



London Borough of Hillingdon

Employment Land and Capacity Study

December 2023

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For and on behalf of Avison Young (UK) Limited and Maccreanor Lavington Limited.

1. Introduction

- 1.1 Avison Young and Maccreeanor Lavington have been commissioned by the London Borough of Hillingdon (LBH) to prepare an Employment Land and Capacity Study (ELCS) to support the review of its Local Plan and the subsequent delivery of its Development Plan.
- 1.2 The purpose of the study is twofold:
- To provide an understanding of the future employment floorspace and land needed to accommodate economic growth in Hillingdon based on industry-accepted economic projections.
 - To determine whether Hillingdon's current employment land supply could meet this identified need, incorporating an assessment of the potential capacity of sites, or whether additional land needs to be allocated for employment uses.
- 1.3 The study goes beyond typical employment land studies as it explores opportunities for industrial intensification and co-location, guided by site-specific capacity assessments, and establishes the nature of employment space that is suitable in different parts of the borough.
- 1.4 The study will be used by LBH to inform its approach to the provision, protection, release and/or enhancement of employment land and premises. It updates and builds on the *Hillingdon Employment Land Study Update (2014)* and *Hillingdon Employment Land Study (2009)* which were used to inform the current *Hillingdon Local Plan*.

Study Approach

- 1.5 The study is split across six chapters to provide a clear overview of both demand for and supply of employment land and space. They are:
- **Policy Context: Understanding the Multi-Scalar Policy Position.**
 - This chapter sets out changes to the national, regional and local policy landscape since the publication of the last *Hillingdon Employment Land Study Update (2014)* to highlight the changing context and provide an understanding of the policies, methodologies, objectives, and ambitions that this document needs to respond to.
 - **Demand Context: Exploring Demand Signals for Employment Floorspace.**
 - This chapter sets out demographic, economic and commercial trends to explore demand signals and consider current and future drivers of economic growth.
 - **Need Context: Determining Future Employment Floorspace Need.**
 - This chapter determines future need for employment land through different industry-accepted forecasts, incorporating a consideration of scenarios and sensitivities informed by the demand context.
 - **Supply Context: Establishing Current and Future Employment Land Supply.**
 - This chapter establishes the total quantum of existing and future employment floorspace and land supply in Hillingdon through a combination of desk-based research and site visits. It also identifies existing sites that have the potential for increased capacity via redevelopment, intensification and/or colocation.
 - **Future Requirements: Considering Current and Future Employment Space Requirements.**
 - This chapter establishes the future employment space requirements for Hillingdon's growth sectors. Going beyond broad use classes it sets out borough-specific space typologies that respond to the local context which have undergone viability testing to ensure deliverability.
 - **Capacity Context: Investigating the Potential of Existing Employment Land.**
 - Using the Hillingdon-specific typologies as a basis this chapter sets out the potential uplift in capacity that can be achieved on opportunity sites across the borough. This is accompanied by a separate detailed capacity study (Annex 1).

- 1.6 These chapters build on one another to provide a clear overview of employment land issues in Hillingdon and are brought together at the end of the study to provide a view on whether identified need can be supported on existing sites or whether alternative approaches are required (see Figure 1). Recommendations are also provided to offer a direction of travel on how to best utilise the borough's land in a viable and deliverable way. This includes advice on locations for different types of economic growth and guidance on the employment land strategy for the borough, providing the base information required by the Greater London Authority (GLA) to pursue a masterplan approach to change within employment areas.
- 1.7 This approach responds to, and goes beyond, the methodology set out in the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG) relating to economic development needs assessments. In line with the NPPF's definition of economic development the study focuses on the following use classes:
- **Class EG(i) - Office:** Offices to carry out operational or administrative functions (former B1a).
 - **Class EG(ii) - Office:** Research and development of products or processes (former B1b).
 - **Class EG(iii) - Industrial:** Light industrial processes (former B1c).
 - **Class B2 - Industrial:** General industrial other than those falling in class EG(iii), typically comprising factory and manufacturing space.
 - **Class B8 - Industrial:** Warehouses, storage and distribution.
 - **Sui Generis - Industrial:** Appropriately located uses in industrial locations (e.g. data centres, scrapyards, display of motor vehicles etc).
- 1.8 It also focuses on the three 'groups' of employment land considered in the previous *Hillingdon Employment Land Study Update (2014)* and *Hillingdon Employment Land Study (2009)*:
- Strategic Industrial Locations (SIL).
 - Locally Significant Industrial Sites (LSIS).
 - Non-designated employment land clusters.

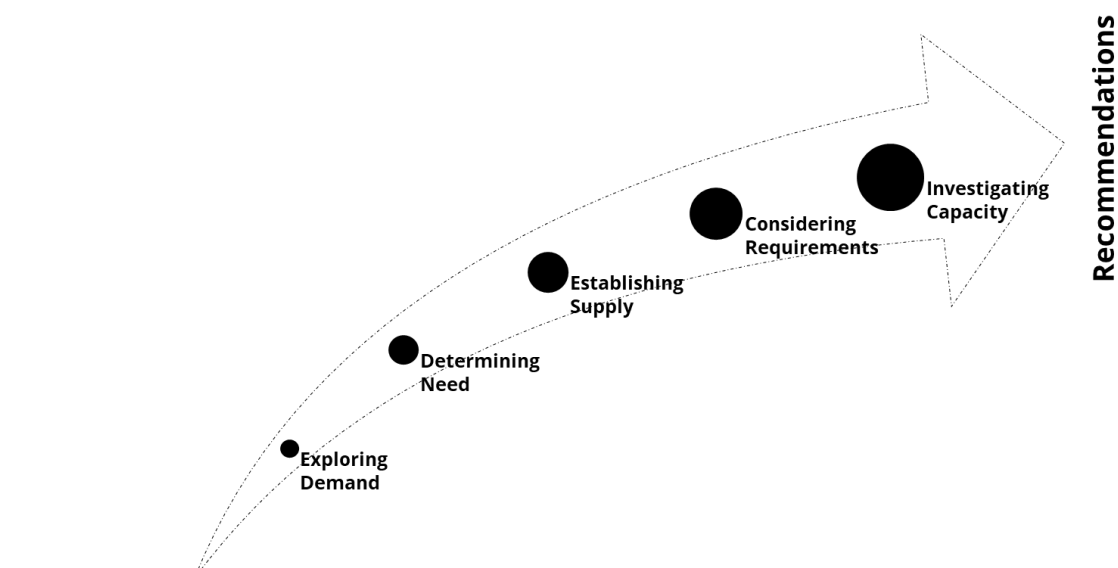


Figure 1: Employment Land and Capacity Study Approach

- 1.9 Throughout the document the borough's position is benchmarked against its immediate neighbours and the wider sub-region. As Figure 2 shows, Hillingdon's immediate neighbours are Ealing, Spelthorne, Slough,

Three Rivers, Harrow and Hounslow¹, and the sub-region incorporates the member boroughs of the West London Alliance – Barnet, Brent, Ealing, Hammersmith & Fulham, Harrow, Hillingdon and Hounslow.

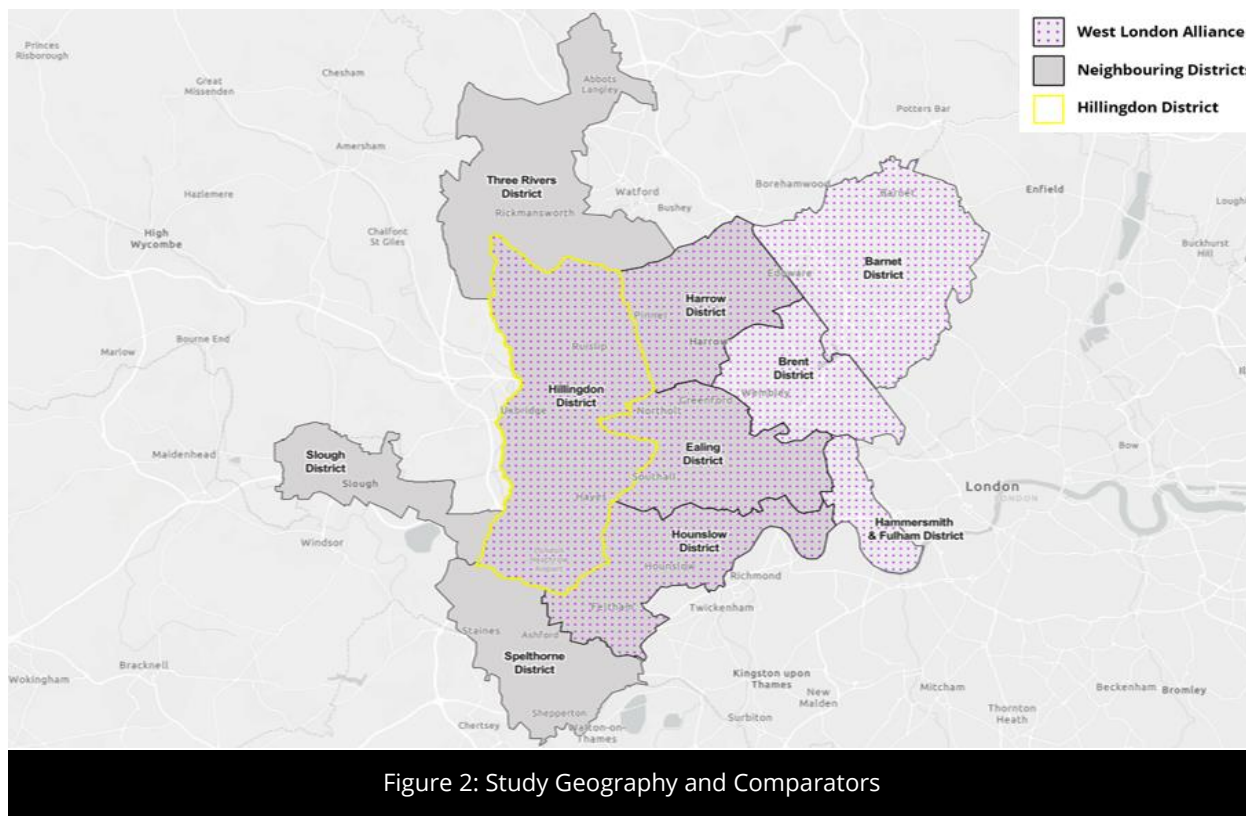


Figure 2: Study Geography and Comparators

¹ The borough's position has not been benchmarked against Buckinghamshire as it covers a much larger geography, encompassing four former district, that stretches as far north as Aylesbury which has a very different socio-economic and market profile to Hillingdon. Data for the former South Buckinghamshire district is also not available for many of the indicators considered.

2. Policy Context: Understanding the Multi-Scalar Policy Position

Chapter Summary

This chapter sets out changes to the national, regional and local policy landscape since the publication of the last *Hillingdon Employment Land Study Update* (2014) to highlight the changing context and provide an understanding of the policies, methodologies, objectives, and ambitions that this study should respond to. Key messages include:

- Since the last *Employment Land Study* the Government has published several iterations of its *National Planning Policy Framework* (NPPF) which sets out its overarching planning policies for England. The latest revision was in July 2021 which, like its predecessor from February 2019, sets out a continued instruction to enact a “*presumption in favour of sustainable development*” through plan making and decision taking.
- The main addition to the latest NPPF is increased support for the storage and distribution sector as well as other high-productivity industries. The document is, however, expected to be revised again in 2023 in line with the introduction of a forthcoming *Levelling Up and Regeneration Bill* (LURB).
- The *Planning Practice Guidance* (PPG) has been revised with the newest iteration published in February 2019 – this provides updated methodologies for local planning authorities to follow to assess the demand for and supply of housing and economic development in their area in accordance with the NPPF. This guidance, alongside the minor update issued in July 2019, will be followed as part of this study.
- The *Town and Country Planning (Use Classes) Order (Amendment) (England)* has also been published since the last *Employment Land Study* and came into effect on 1st September 2020. This includes the introduction of the new Use Class E which subsumes the previous A1, A2, A3, B1, D1 and D2 use classes meaning that planning permission is no longer required for change of use between these former classes.
- Major changes were also made to the *General Permitted Development Order* (GDPO) in 2020. These include the introduction of Class ZA, Class AA, Class AB and Class MA which provide landowners and developers with new Permitted Development Rights related to office and industrial space.
- A new *London Plan* (2021) has been published by the Mayor of London since the last *Employment Land Study* which sets out a new framework for the city's development over the next two decades. It is different to previous iterations as it focuses on “*Good Growth*” – growth that is socially and economically inclusive and environmentally sustainable. It has a stronger emphasis on industrial land than previous iterations - it consumes over a third of its economic policies.
- The Mayor of London has also published his *Economic Development Strategy for London* (2018). This identifies both a need to “*retain sufficient industrial land to keep the economy functioning efficiently*”, and “*[provide] a substantial amount of new office space to accommodate the growth of the services sector*”.
- The West London Alliance has published a range of important sub-regional documents since the last *Hillingdon Employment Land Study Update* (2014). The most relevant for this study are the *West London Alliance Vision for Growth* (2020) and *West London Affordable Workspace Study* (2020).
- LBH's *Local Plan* (2012-2026) sets out the future development strategy for the borough and provides a framework to guide planning decisions. It currently comprises: *Local Plan Part 1: Strategic Policies* (2012), *Local Plan Part 2: Development Management Policies* (2020) and *Local Plan Part 2: Site Allocations and Designations* (2020). A partial review of these three documents is currently underway which will ultimately combine them into a single document covering the period 2023-2038 and reflecting the latest version of the *London Plan* (2021).
- Until a new Local Plan is agreed the existing *Hillingdon Local Plan* remains the adopted Development Plan. This identifies a strategic objective to “*...protect land for employment uses to meet the needs of different sectors of the economy*” as well as “*the release of surplus employment land for other uses*”. Beyond the 10 designated employment sites it states that “*there is more employment land than currently needed, and any release of surplus industrial land will be carefully managed to support Hillingdon's employment generation*”. Based on the 2009 *Employment Land Study* it sets out that 17.58 hectares of surplus industrial and warehousing land could be released between 2011 and 2026.

National Context

National Planning Policy Framework (NPPF) (2021), Ministry of Housing, Communities and Local Government

- 2.1 Since the last *Hillingdon Employment Land Study Update* (2014) Government has published several iterations of its National Planning Policy Framework (NPPF) which sets out its overarching planning policies for England. The latest revision was in July 2021 which, like its predecessor from February 2019, sets out a continued instruction to enact a *"presumption in favour of sustainable development"* through both plan making and decision taking.
- 2.2 By this, the Government mean that the planning system should achieve three objectives: economic, social and environmental. The system should help build a *"strong, responsive and competitive economy"*, support *"strong, vibrant and healthy communities"* and contribute to *"the protection and enhancement of the natural, built and historic environment"*.
- 2.3 As with previous iterations of the Framework, the latest version it makes it clear that Local Planning Authorities (LPAs) should proactively plan to meet the employment land and development needs of businesses through their Local Plans. Local land targets should still be tested through the Local Plan process and LPAs must collect and use reliable information to justify employment land supply policies.
- 2.4 The latest Framework indicates that LPAs should continue to ensure that Local Plans are based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of their area. LPAs are to ensure that their strategies for housing, employment and other uses are integrated and take full account of relevant market and economic signals.
- 2.5 Chapter 6 still states that *"significant weight"* should be placed on the need to support economic growth and productivity through the planning system. To help achieve this economic growth planning policies are to:
- *"Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth"*.
 - *"Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period"*.
 - *"Seek to address potential barriers to investment such as inadequate infrastructure, services or housing or a poor environment"*.
 - *"Be flexible to accommodate needs not previously anticipated in the plan, allowing for new and flexible working practices and to enable a rapid response to economic changes"*.
- 2.6 Paragraph 122 also sets out that planning policies need to reflect changes in demand for land and should be informed by regular reviews of the land allocated for development and land availability. Therefore, where there is no reasonable prospect of development, allocated sites should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.
- 2.7 The updated Framework also still states that LPAs and County Councils (in two tier areas) have a duty to cooperate with each other on planning issues that cross administrative boundaries. It suggests that strategic policy making authorities should engage with their local communities and relevant bodies including Local Enterprise Partnerships (LEPs), Council Councils, infrastructure providers and Combined Authorities.
- 2.8 One change versus the last iteration of the Framework is the introduction of Paragraph 83 which supports storage and distribution operations and highly productive technology industries. Planning policies are now expected to recognise and address the specific locational requirements of these sectors and others. The recognition of storage and distribution operations is considered overdue and reflects the growing role that logistics activities play in the wider economy.

2.9 The NPPF is expected to be revised again in 2023 in line with the introduction of a Levelling Up and Regeneration Bill (LURB). There are several indications that this revision will see the NPPF align more closely with the intent of the Government's Levelling Up White Paper which was published in February 2022:

- The Levelling Up and Regeneration Bill consultation highlights Government's intent to ensure that national planning policies empower local leaders to attract investment, drive economic growth and grow the private sector.
- It indicates that a review of the NPPF may involve a reshaping of policies under '*Chapter 6: Building a Strong, Competitive Economy*' to align to the economic vision in the Levelling Up White Paper by:
 - Making sure that Local Plans in every part of the country support new business investment and give existing business, including SMEs, the confidence to expand and grow.
 - Supporting the sectors and businesses that will drive up productivity. There is an ambition for technology companies, life sciences and those involved in Research and Development to invest more and grow more in every part of the country.
- It also highlights potential for wider changes to the NPPF including proposals to consult on "*a more positive framework for supporting economic development, including reviewing the approach to supporting employment land and the consideration of supply chain and connectivity issues*".

National Planning Practice Guidance (PPG) (2019), Ministry of Housing, Communities and Local Government

2.10 The Planning Practice Guidance (PPG) has also been revised recently with the newest iteration published in February 2019 – this provides updated methodologies for LPAs to follow to assess the demand for and supply of housing and economic development in their area in accordance with the requirements of the NPPF. A further revision related to storage and distribution and specialised sectors was issued in July 2019.

2.11 The revised PPG acknowledges that national economic trends will not apply universally and business needs will vary according to local circumstances and market conditions. It therefore states that LPAs should continue to liaise closely with the business community to understand their current and potential future requirements – they are expected to consider:

- *"The recent pattern of employment land supply and loss to other uses"*.
- *"Market intelligence (from local data, discussions with developers and property agents and engagement with business and economic forums)"*.
- *"Market signals such as changes in rental values and differentials between land values in different uses"*.
- *"Public information on employment land and premises required"*.
- *"Information held by other public sector bodies and utilities in relation to infrastructure constraints"*.
- *"The existing stock of employment land which should indicate the demand for and supply of employment land and determine the likely business needs and future market requirements"*.
- *"The locational and premises requirements of particular types of businesses"*.
- *"Potential oversupply and evidence of market failure"*.

2.12 When examining the recent take-up of employment land, the revised PPG advises that it remains important to consider projections (based on past trends), forecasts (based on future scenarios) and occurrences where sites have been developed for specialist economic uses. In terms of forecasting future trends, it advises that:

- *"Plan makers should consider forecasts of quantitative and qualitative need i.e. the number of units and amount of floorspace but also its particular characteristics e.g. footprint of economic uses or proximity to infrastructure"*.
- *"Local authorities should develop an idea of future needs based on a range of data which is current and robust"*.
- *"Emerging sectors that are well suited to the area being covered by the analysis should be encouraged where possible"*.
- *"The available stock of land should be compared with the particular requirements of the area so that 'gaps' in local employment land provision can be identified"*.

- 2.13 It also states that plan makers should consider:
- *“Sectoral and employment forecasts and projections (labour demand)”.*
 - *“Demographically derived assessments of future employment needs (labour supply techniques)”.*
 - *“Analysis based on the past take up of employment land and property and/or future property market requirements”.*
 - *“Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics”.*
- 2.14 To derive employment land requirements, it states that when translating employment and output forecasts into land requirements there are four key relationships which need to be quantified:
1. Standard Industrial Classification sectors to use classes.
 2. Standard Industrial Classification sectors to type of property.
 3. Employment to floorspace (employment density).
 4. Floorspace to site area (plot ratio based on industrial proxies).
- 2.15 The July 2019 amendment extends the guidance by recognising the critical role of storage and distribution and the associated need for more warehousing space. It advises that strategic facilities serving national or regional markets are likely to require significant amounts of land, good access to strategic transport networks, sufficient power capacity and access to appropriately skilled local labour. It suggests that need can be informed by engagement with *“logistics developers and occupiers to understand the changing nature of requirements in terms of type, size and location including impact of new technologies”*, *“analysis of market signals, including trends in take up and availability of logistics land”*, and *“analysis of economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities”*.

Town and Country Planning Act (TCPA) (2020), HM Government

- 2.16 The *Town and Country Planning (Use Classes) Order (Amendment) (England)* has also been published since the last *Hillingdon Employment Land Study Update* (2014) and came into effect on 1st September 2020. This has fundamentally changed the Use Class Order that was used at the time of the previous study.
- 2.17 Most notable has been the introduction of the new Use Class E - *“Commercial, Business and Service”*. This subsumes the previous A1 (Retail and Shops), A2 (Financial and Professional Services), A3 (Food and Drink), B1 (Office, Research and Development and Light Industrial), D1 (Non-Residential Institutions), D2 (Assembly, Leisure and Entertainment) uses into a single use class meaning that planning permission is no longer required for change of use between these former classes. This includes the conversion or loss of office, research and development and light industrial space (former D1) to other categories with Class E.
- 2.18 The Residential (C classes), General Industrial (B2) and Storage and Distribution (B8) use classes remain unchanged by the amendments. The NPPF and PPG also remain unchanged and LPAs are still required to understand and plan for their business needs regardless of the Use Class Order amendments.

General Permitted Development Order (GPDO) (2020), HM Government

- 2.19 Major changes were also made to the General Permitted Development Order (GDPO) in 2020 which represents a material change to the context. Notably, it introduced Class ZA which allows for the demolition of a single detached building used for office, research and development or light industrial processes (previous B1 use class), or a free-standing purpose-built block of flats, to be replaced by an individual detached block of flats or a single detached house within the footprint of the old building, with up to two additional storeys. This applies to buildings that have been vacant for six months and were built before 31st December 1989.
- 2.20 The GDPO also introduced Class AA and Class AB. The allows for the construction of up to two new storeys of flats in the airspace above detached (Class AA) and semi-detached/terraced buildings (Class AB) in commercial (former A1, A2, A3 or B1a use classes) or mixed use, including where there is an element of

residential use. This is unlikely to have as much of an impact on employment land as Class ZA, but could disrupt existing businesses and future-redevelopment schemes (e.g. for out-of-town retail parks) if elements of residential are introduced on an ad hoc basis.

- 2.21 In April 2021 the Government also announced that they would introduce a new Permitted Development Right, known as Class MA, to allow the newly introduced Class E uses to be converted to residential use. This became law in August 2021 and applies to buildings that have been vacant for at least three continuous months prior to submission of the prior approval. Crucially, the previous right to convert an office of unlimited size to residential (under Class O) has been terminated and the new Class MA has a maximum limit of 1,500sqm (16,146 sqft) per building.

Regional Context

London Plan (2021), Greater London Authority

- 2.22 A new *London Plan* (2021) has been published by the Mayor of London since the last *Hillingdon Employment Land Study Update* (2014), which sets out the framework for the city's development over the next two decades. It is different to previous iterations as it focuses on "*Good Growth*" – growth that is socially and economically inclusive and environmentally sustainable.
- 2.23 *Chapter 6: Economy* is of particular note as it sets out policies related to London's economy and employment land. It is considered an important pillar of the whole document as it has a direct impact on achieving other strategic policies. It has seen many changes since the preceding London Plan, particularly in relation to industrial land which is now the focus on over one-third of its policies.
- 2.24 The most relevant policies are:
- **Policy E1:** This sets out that offices should be supported in locations such as town centres and existing urban business parks. It refers to evidence that indicates that future demand could exceed supply and it identifies locations outside the Central Activity Zone to support prime office development. It states that existing viable office floorspace capacity should be retained, supported by Article 4 Directions to remove Permitted Development Rights where appropriate, to facilitate the redevelopment, renewal and re-provision of office space where viable.
 - **Policy E2:** This identifies that local Development Plans should support the provision and, where appropriate, protection of a range of B Use Class business space, in terms of type, use size and price point, specifically referring to supporting provision of low-cost accommodation.
 - **Policy E3:** This asks boroughs to provide detailed affordable workspace policies in light of local evidence of need and viability. It defines affordable workspace as at "*rents maintained below the market rate for that space for a specific social, cultural or economic development purpose such as:*
 1. *For specific sectors that have social value such as charities, voluntary and community organisations or social enterprises.*
 2. *For specific sectors that have cultural value such as creative and artists' workspace, rehearsal and performance space and makerspace.*
 3. *For disadvantaged groups starting up in any sector.*
 4. *Supporting educational outcomes through connections to schools, colleges or higher education.*
 5. *Supporting start-up and early stage businesses or regeneration*".
 - **Policy E4:** In alignment with the NPPF, this sets out an objective to ensure a "*sufficient supply of land and premises in different parts of London to meet current and future demands for industrial and related functions*". Policies E4:A1 and E4:A2 state that provision of "*light and general industrial uses*" should be a mechanism of providing industrial economic development as well as "*storage and logistics/distribution (Use Class B8), including 'last mile' distribution close to central London and the Northern Isle of Dogs*". Policy E4:A8 further states that that flexible (B1c/B2/B8) hybrid space is also important "*to accommodate services that support the wider London economy and population*". As well as creating new industrial land, the London Plan is

clear about the importance of retaining London's existing industrial land. Policy E4:C states that *"the retention, enhancement and provision of additional industrial capacity"* should be planned, monitored and managed for designated sites (notably Strategic Industrial Locations², Locally Significant Industrial Sites³ and Non-Designated Industrial Sites).

- **Policy E5:** This stipulates that Strategic Industrial Locations (SILs) *"should be managed proactively through a plan-led process to sustain them as London's main reservoirs of industrial, logistics and related capacity"*. London Borough are expected to *"define the detailed boundary of SILs in policies maps"* in order to locate, measure and compare socio-economic impact. They also need to *"develop local policies to protect and intensify the function of SILs and enhance their attractiveness and competitiveness"*. Development proposals are to be supported where the uses proposed are industrial-type activities. London has around 55 SILs, four of which are in Hillingdon: Hayes Industrial Area, North Uxbridge Industrial Estate, Stonefield Way and Uxbridge Industrial Estate (see Figure 3).

Policy E5:D reemphasises the mandate of Policy E4:C that *"development proposals within or adjacent to SILs should not compromise the integrity or effectiveness of these locations in accommodating industrial type activities and their ability to operate on a 24-hour basis, for mainly B1c, B2 and B8 planning uses"*. Any residential development that comes forward adjacent to SILs is expected to be designed to ensure that current or potential industrial activities are not compromised or curtailed.

- **Policy E6:** This makes clear that boroughs are expected to designate and define detailed boundaries and policies for Locally Significant Industrial Sites (LSISs), justified by evidence in local Employment Land Reviews. Boroughs are to make it clear in policy that a range of industrial and related uses are acceptable in LSISs.
- **Policy E7:** This sets out principles for industrial intensification, co-location and substitution. It states that Development Plans should be proactive and encourage the intensification of business uses in Use Classes B1c, B2 and B8 occupying all categories of industrial land through:
 - Introduction of small units.
 - Development of multi-storey schemes.
 - Addition of basements.
 - More efficient use of land through higher plot ratios having regard to operational requirements (including servicing) and mitigating impacts on the transport network where necessary.

It states that industrial intensification should be considered in SILS and LSIS to provide additional capacity. It also identifies that intensification can be used in these contexts to *"support the delivery of residential and other uses, such as social infrastructure, or to contribute to town centre renewal"* if certain criteria are met – for example:

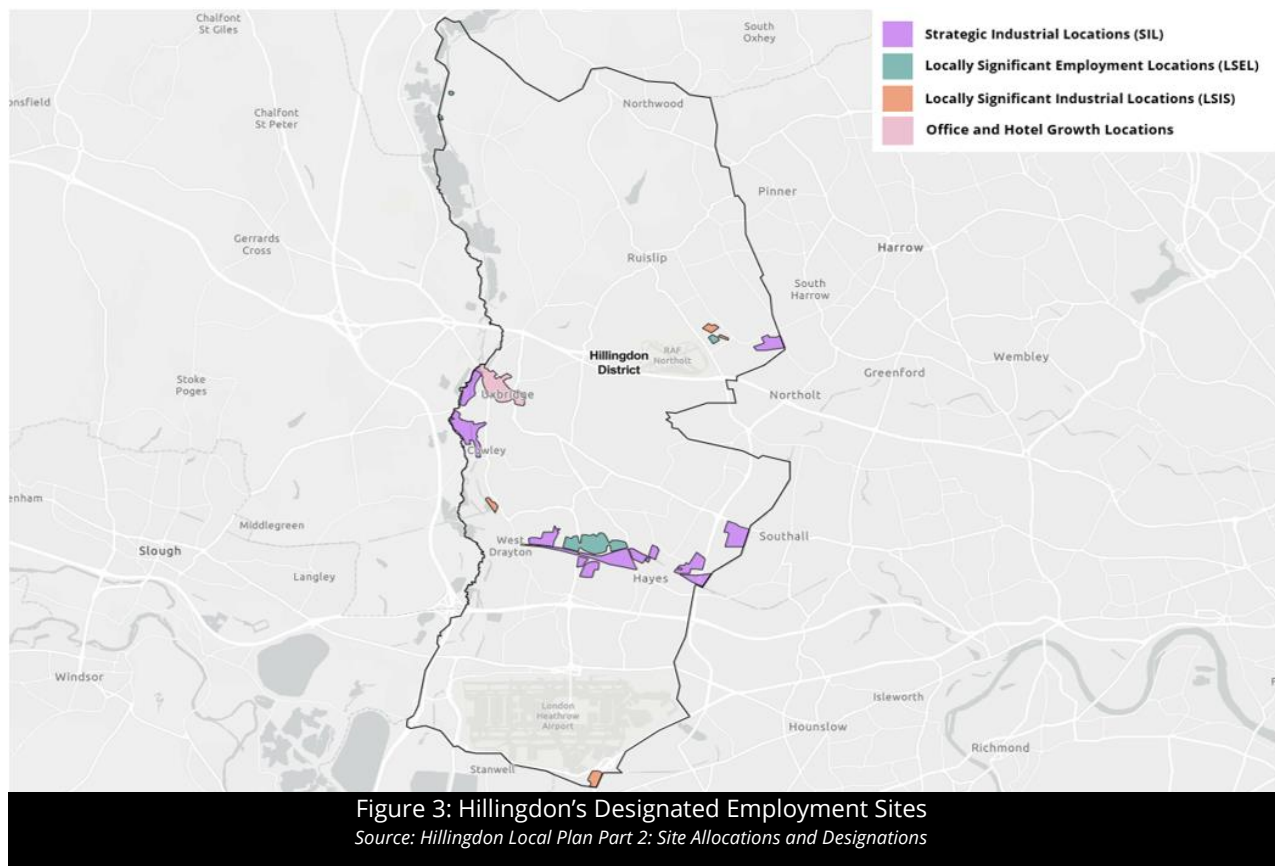
- The industrial and related activities on-site and in surrounding areas are not compromised in terms of their continued efficient function, access, service arrangements and days / hours of operation noting that many businesses have 7-day / 24-hour access and operational requirements.
- The intensified industrial, storage and distribution uses are completed and operational in advance of any residential component being occupied.
- Appropriate design mitigation is provided in any residential element with particular consideration given to: safety and security; the layout, orientation, access, servicing and delivery arrangements of the uses in order to minimise conflict; design quality, public realm, visual impact and amenity for residents; vibration and noise; and, air quality, including dust, odour, and emissions and potential contamination.

² Strategic Industrial Locations (SILs) are London's main reservoirs of industrial and related capacity. There are two types of SILs: Preferred Industrial Locations (PIL) and Industrial Business Parks (IBP) – the former are suitable for industrial, wholesale, distribution, waste management and recycling and the latter are more suited to specialist industrial and office development. The London Plan states that development proposals within or adjacent to SILs should not compromise the integrity or effectiveness of these locations in accommodating industrial type activities.

³ Locally Significant Industrial Sites (LSISs) are sites that have local importance for industrial and related functions, which complement provision in SILs.

This must be considered as part of a plan-led process of SIL or LSIS intensification and consolidation in collaboration with the GLA.

- 2.25 Importantly, the *London Plan* (2021) sets out that Uxbridge is considered to have “*speculative office potential*”, meaning it has capacity, demand and viability to accommodate new speculative office development. It states that existing urban business parks such as Stockley Park should be consolidated and take steps towards greater transport sustainability.



London Industrial Land Supply Study (2023), Greater London Authority

- 2.26 A key part of the evidence base for the *London Plan* (2021) is the *London Industrial Land Supply Study (2023)*. This updates the previous *London Industrial Land Supply Study (2015)* by providing a comprehensive overview of London's industrial supply base, alongside an assessment of the economic function, character and role of SILs across the capital. Key messages from the study are set about below.

Key Message 1: Land Supply Pressures

- 2.27 *London's industrial land supply has shrunk significantly over the last 20 years, but the loss of land has occurred at the most significant rate in the last five years. The planning pipeline signifies that this trend is set to persist at an unprecedented rate.*
- The land use vacancy rate is just 4% (down consistently from 16% in 2001). The scale of decrease has been most pronounced since 2015. In comparison, Hillingdon is reported to have a land use vacancy rate of 0.4%.
 - Land in industrial use in London has seen continued decline over the last 20 years, with heavy pressure from competing land uses, and particularly residential uses. Between 2001 and 2020, 355 ha of industrial land has been lost.
 - The 2017 London Industrial Demand Study recommended a benchmark release of 232 ha between 2016 and 2041 but between 2015 and 2020 there has already been a loss of 352 ha, demonstrating erosion

of land beyond the recommended release in all sub-regions. This has been most stark in East London but remains a challenge across the city.

- Looking at the future pipeline, there is an estimated 736 ha of land in industrial and related uses in the planning pipeline that could potentially change to non-industrial uses presenting even greater pressure on supply of land. About 30% of this is proposed Local Plan release from SIL or LSIS designations.
- Growth of non-industrial employment between 2015 and 2019 in designated industrial areas is particularly significant in some boroughs including Islington (+25%), Barking and Dagenham (+17%), Brent (+14%) and Harrow (+11%). Reported figures for Hillingdon are c.1.8% over the same time period.

Key Message 2: Floorspace Supply Pressure

2.28 *Loss of industrial land in London has direct implications for floorspace, with a chronic (and worsening) undersupply of industrial stock. Of the stock that does exist, there is a significant challenge here around obsolescence particularly in the context of Minimum Energy Efficiency Standard (MEES) regulations.*

- Floorspace capacity in London is very tight, with vacancy currently sitting at 3.2%. This rate remains low across all unit typologies and geographies. Comparatively, Hillingdon's vacancy sits at 4% according to this report.
- The highest levels of vacancy are seen within the 25-50k sqft category (4.1%), whilst units sized 2.5-5k sqft and 100k+ sqft present the lowest vacancy level (each c.1.7%).
- At borough level, floorspace vacancy rates range from lower than 2% in Hackney, Harrow, Hounslow, Kensington and Chelsea and Richmond to 7% in Bromley and 8% in Sutton.
- The existing inventory of stock is dated. At least 60% of London's industrial buildings were completed or last renovated prior to 2000 and just 4% of stock was completed/last renovated post-2010. This indicates the need for new or upgraded stock, particularly in the context of MEES regulations, which requires all properties being let to achieve an EPC rating of E with this due to rise to C by 2030.
- Combined, an under-supply of industrial stock and a high risk of obsolescence presents a critical risk to the future vitality of the sector. Delivery of new stock will be of paramount importance to address these issues.

Key Message 3: Deep and Broadening Demand

2.29 *Against this supply context, industrial demand is at unprecedented levels in London across a whole host of uses and unit sizes. This demand/supply imbalance is driving strong rental value and capital value growth.*

- There has been significant growth in demand for 'big box' distribution stock fuelled by changing consumer habits and the growth of e-commerce. This has focused on key locations with good access to the strategic road network including Ealing, Barking and Dagenham and Enfield.
- The strength in demand for stock of this nature relative to the existing undersupply has been a significant factor driving increased industrial rents, capital values and land values across London.
- As the strength in demand is set to continue a growing development pipeline for 'big box' stock and continued upward pressure on rents and values are likely.
- This demand is expected to be supplemented by a growing market for non-traditional B-class uses including Film and TV Production with similar requirements for large floorplate space in Outer London.
- In addition, the changing nature of consumer habits and industrial trends indicate that demand is growing for a wider range of industrial typologies, including final mile distribution space which typically focuses on smaller floorplates and close proximity to residential areas.
- Headline industrial rents have seen strong growth – now at £19psf – which reflects a 36% uplift on the 10-year average of £14psf. As expected, smaller buildings reflect higher values psf, but there is a premium for 100k sqft plus, due to the depth of demand for logistics, and an array of wider uses the feed demand for units of this nature.
- Capital values reflect an even steeper trend, seeing 62% uplift on the 10-year average to reach £318 psf.
- These value shifts are indicative of a market with extremely tight, and worsening supply, against a growing basis of demand.

London Industrial Land Demand Study (2017), Greater London Authority

2.30 The *London Industrial Land Demand Study (2017)* also forms an integral part of the evidence base for the *London Plan (2021)*. It assesses land demand for different types of industrial activities and quantifies the amount of industrial land London needs to maintain to ensure it continues to function as a successful and sustainable city. Key messages from the study include:

- The report projects a reduction in demand for general and light Industrial land to 166.5 ha over the period 2016-41. The study assumes that there will be a growth in warehouse demand of 280 ha over the period 2016-41.
- The major transport investment programme required to support London's growth to 2050 is expected to generate additional demand for industrial land. This will primarily include land for new rail and bus depots and for new stations. The GLA state that the overall scale of demand to 2050 could be around 200 ha or more.
- Combining the various projections together, the updated benchmark projections for London suggest that for the period 2016-41 a total of 233 ha of industrial land can be released or an average of 9.3 ha per annum.
- This figure is much a lower level of release than set out in the 2011 Industrial Land Benchmark study and can be explained by industrial land being released faster than the benchmark guidance, and current GLA economic projections showing industrial employment in London declining at a much slower rate than those which informed the previous study.
- This suggests much stronger policy is needed if industrial land releases are to be restricted to the benchmark targets. If industrial land were to continue to be released at the same rates when the report was realised the GLA project this would result in the loss of 1,630 ha of industrial land by 2041.

London Intensification and Co-Location Study (2019), Greater London Authority

2.31 Aligned with this preceding documents is the *London Intensification and Co-Location Study (2019)*, which provides guidance on the acceptability of industrial intensification and co-location with residential, as well as testing the viability and deliverability of proposals based on the guidance provided. The study has shaped policies set out in the *London Plan (2021)* and can be used by landowners, developers and LPAs to make decisions about their industrial assets. The study covers the following five areas:

1. **Defining and Measuring Industrial Intensification** to support the implementation of planning policies and the assessment of planning applications.
2. **Specifications and Construction Costs** to provide definitions of industrial space specification to ensure industrial intensification with residential results in genuine 'industrial space'.
3. **Urban Scale Guidance** to provide guidance on the development of industrial intensification and associated co-location with residential beyond the individual site boundary.
4. **Testing Proposals** to test the broad viability of industrial intensification in London.
5. **Deliverability Commentary** to provide general commentary on wider deliverability issues and potential barriers to delivery, as well as any opportunities for market actors or requirements for public sector intervention of various kinds.

Mayor's Economic Development Strategy (2018), Greater London Authority

2.32 The *Mayor's Economic Development Strategy for London (2018)* has also been published since the last *Hillingdon Employment Land Study Update (2014)*. This document summarises the diversity of London's economy, sets out key challenges London faces and identifies opportunities to curate a more inclusive, equitable and sustainable economy.

2.33 Chapter 4, *Creating the Conditions for Growth*, states that "industrial areas help to keep London's economy working effectively" however "industrial land in London has been lost at almost three times the benchmark set by the *London Plan*". Assuming sustained demand, lower industrial land supply equates to increased rents as

well as higher road congestion as businesses are forced to move to cheaper industrial land locations away from London.

- 2.34 Despite this loss of industrial land, the *“Mayor wants to ensure that London retains sufficient industrial land to keep the economy functioning efficiently”*, predominately by *“intensifying the way London’s industrial land is used, through more multi-storey industrial buildings with associated shared yard space or co-location alongside residential development; and help to enhance the physical condition of London’s industrial estates by supporting the creation of Industrial Business Improvement Districts (IBIDs)”*.
- 2.35 In addition to this, the Mayor identifies an ambition to support the growth in services across the city. The document, which was written before COVID-19, identifies a need for *“a substantial amount of new office space to accommodate the growth of the services sector”*. It sets out that spaces should be accommodated *“through new sites, redevelopment or intensification, otherwise rents could rise to uncompetitive levels and growth could be constrained”*. The Central Activities Zone and Isle of Dogs North (i.e. Canary Wharf) are identified as the main focus areas for office development, as well as Stratford, Old Oak and *“viable office clusters in town centres (including those in outer London) as part of creating diverse local economies”*.

West London Vision for Growth and Affordable Workspace Study (2020), West London Alliance

- 2.36 Alongside London-level policy and strategy, the West London Alliance has published a range of relevant sub-regional documents since the last *Hillingdon Employment Land Study Update* (2014). Examples include the *West London Strategic Infrastructure Delivery Plan* (2020), *Green Jobs and Skills in West London Study* (2022), *West London Build and Recover Economic Strategy* (2019) and the *West London Strategic Housing Market Assessment* (2019).
- 2.37 Of most relevance to this study is the *West London Alliance Vision for Growth* (2020), which sets out a collective vision and strategy for the sub-region’s economy. Shaped around the aspirations of the *West London Build and Recover Economic Strategy* (2019), it sets out seven thematic areas and ambitions for each. These are summarised below:
1. **Growth Sectors:** Capitalise on the opportunity to develop a growth sectors ‘innovation district’ spanning the sub-region and branching out across the country.
 2. **Aviation Communities:** Minimise job losses with major aviation employers through the wider supply chain and support BAME residents and those at risk of a loss of livelihood due to Heathrow’s downturn.
 3. **Skills and Employment:** Use funding and policy to enable an economic recovery in which entrenched disadvantage is addressed and inclusion and wellbeing promoted.
 4. **Entrepreneurs and Microbusinesses:** Increase productivity and job creation by increasing skill levels of owner managers and self-employed in “traditional” enterprise entry-level businesses.
 5. **Green Recovery:** Enable West London to be a national leader in key elements of the green economy.
 6. **Town Centres:** Ensure town centres are successful, sustainable, and resilient places that are at the heart of their communities and differentiated by a rediscovered local identity, heritage and character, whilst simultaneously reinventing themselves for the modern post-Covid age.
 7. **Housing and Infrastructure:** Deliver the new homes West Londoners need - affordable to all, supported by strong infrastructure, and providing a high quality of life.
- 2.38 Another study of relevance is the *West London Alliance Affordable Workspace Study* (2020) which looks at determining the need for, and potential approaches to delivering, affordable workspace across the sub-regional area. Key points from the study are summarised below:
- There is no single ‘industry standard’ definition on affordability, and it should not be defined solely on the basis of rent paid by the operator or final end user. It can encompass a range of different factors such as: discounted rent, lease incentives, ‘all in rent,’ rent structures, fit-out, right sizing, shared facilities, use intensification, meanwhile uses, and business rates. This is important in relation to future affordable workspace delivery in terms of broadening the understanding of different delivery models and suitable fit-outs that can be considered.

- There are wider influences across West London driving demand for affordable workspace. This includes major rail investments, the presence and access to key economic assets and cluster drivers including universities, colleges and hospitals (such as Brunel University and Hillingdon Hospital), the potential expansion of Heathrow Airport, and the wider regeneration and development investments across the nine designated opportunity areas in West London.
- Key projections for growth indicate particularly strong sector activities for Hillingdon in Administrative and Supportive Services, Professional Services and Construction activities. These drive the need for both office-type and industrial-style commercial spaces, some of which could be affordable workspace.

2.39 The culmination of all the analysis leads to an understanding of key sectors and activities that are likely to be of strategic importance in West London and which will inherently require a variety of different workspaces to support and encourage growth. These activities include Film and Media, Science and Health, Logistics and Freight, Food Manufacturing, and Professional/Technical Services. Typically, these activities occupy co-working office, small scale light industrial (B1c), and creative (B1a/b/c) spaces.

2.40 In response, nine hypothetical workspace typologies are put forward by the study, some with co-location of residential, to support competing growth objectives. This includes a range of typologies at different sizes and scales as well as an understanding of suitability for the identified specific sector activities important to West London. Thinking around key types of sites (e.g. town centre location, edge of industrial etc.) is set out, with advice around general design considerations. This includes amenity space, access and servicing, street frontage etc.

2.41 Detailed delivery considerations are also provided. These covers key topics such as:

- The need to consider scale and operational viability.
- Securing appropriate levels of specification and fit-out.
- Appropriate operational fit outs.

West London Waste Plan (WLWP) (2015), London Boroughs of Brent, Ealing, Harrow, Hillingdon, Hounslow and Richmond and Old Oak and Park Royal Development Corporation

2.42 Another relevant sub-regional document is the *West London Waste Plan (WLWP) (2015)*, which was published at the same time as the last *Hillingdon Employment Land Study Update (2014)*. This identifies the issues and objectives to be met in waste management within West London up to 2026. It sets out partner boroughs' long-term vision, spatial strategy and policies for the sustainable management of waste over this period. It is a Development Plan Document and forms part of Hillingdon's *Local Plan* evidence base. Relevant policies include the following:

- **WLWP Policy 1 'Location of Waste Development'**: This states that waste development proposals outlined within the WLWP will generally be supported, provided that they comply with other WLWP policies and the boroughs' Local Plans. It also aims to ensure that any redevelopment of existing waste sites must ensure that the quantity of waste to be managed is equal to or greater than the quantity of waste which the site is currently permitted for.
- **WLWP Policy 2 'Ensuring High Quality Development'**: This outlines that all development proposals needed to demonstrate that the appropriate level of sustainable environmental design has been applied to both the construction and operational phases of the development. This includes minimising the impact of noise, dust, litter, odour and other emissions as well as ensuring development is of a scale, form and character appropriate to its location. Development proposals should also consider alternative methods of waste transfer such as by water and rail to reduce the impact on local road networks.

Local Context

Hillingdon Local Plan, London Borough of Hillingdon

2.43 LBH's current *Local Plan* sets out the future development strategy for the borough and provides a framework to guide planning decisions. It comprises:

- *Local Plan Part 1: Strategic Policies* (adopted November 2012).
- *Local Plan Part 2: Development Management Policies* (adopted January 2020).
- *Local Plan Part 2: Site Allocations and Designations* (adopted January 2020).

2.44 As identified in the borough's *Local Development Scheme* (2021) a partial review of these three documents is currently underway which will ultimately combine them into a single document. This new *Local Plan* will cover the period 2023-2038 and will reflect the latest version of the *London Plan* (2021). This review is to cover the following sections of the current suite of documents:

- The vision.
- Strategic policies for the economy, housing, historic and built environment, environmental improvement, transport and infrastructure.
- Development management policies in relation to the economy, town centres, housing, historic and built environment, design, environmental improvements, community infrastructure and transport.
- The Site Allocations and Designations.
- The Policies Map as required.

A Regulation 18 Consultation will take place in 2023 and the review of the *Local Plan* will be informed by the findings of this study.

2.45 Until this happens the existing *Local Plan* is the current adopted Development Plan. Part 1 is the same version that underpinned the last *Hillingdon Employment Land Study Update* (2014) and remains unchanged since then. Its overarching strategic objective for the economy, as set out in Chapter 5, is to "...protect land for employment uses to meet the needs of different sectors of the economy.. [and] Manage the release of surplus employment land for other uses". To support this, it proposes:

- Four SILs: Uxbridge Industrial Estate (Preferred Industrial Location), Victoria Road/Stonefield Way (Preferred Industrial Location), Hayes Industrial Area (Preferred Industrial Location) and North Uxbridge (Industrial Business Park).
- Three LSISs: Packet Boat Lane (Cowley), Braintree Road Industrial Area (South Ruislip) and Covert Farm (Heathrow).
- Three Locally Significant Employment Locations (LSELs)⁴: Summerhouse Land/Salamander Quay (Harefield), Stockley Park and Odyssey Business Park (South Ruislip).

2.46 Based on available forecasts at the time of publication it identifies that "*there is more employment land than currently needed, and any release of surplus industrial land will be carefully managed to support Hillingdon's employment generation whilst creating opportunities for regeneration and release to other uses including much needed housing*". Based on the *Hillingdon Employment Land Study* (2009) it sets out that 17.58 hectares of surplus industrial and warehousing land could be released between 2011 and 2026 - this was later revised to between 16.3 and 20.6 hectares of land following the *Hillingdon Employment Land Study Update* (2014).

2.47 The most relevant employment land policies in the *Part 1* document are:

- **Policy E1, Managing the Supply of Employment Land:** LBH will accommodate growth by protecting SILs and the designation of LSISs and Locally Significant Employment Locations (LSEL).

⁴ These are like SILs but have a light industrial, office and research role.

- **Policy E2, Location of Employment Growth:** LBH will accommodate 9,000 new jobs during the plan period. Most of this employment growth will be directed towards suitable sites in the Heathrow Opportunity Area, SILS, LSEs, LSISs, Uxbridge Town Centre and Hayes Town Centre.
- **Policy E3, Strategy for Heathrow Opportunity Area:** LBH will prepare a Local Development Document (LDD) for the Heathrow area to achieve future growth.
- **Policy E4, Uxbridge:** LBH will strengthen the status of Uxbridge Town Centre as a Metropolitan Centre by delivering growth and promoting Uxbridge as a suitable location for retail, offices, hotels, recreation and leisure, entertainment and culture, evening and night-time economy, education, community services and mixed-use development.
- **Policy E5, Town and Local Centres:** LBH will accommodate additional retail growth in established centres in accordance with the conclusions of the latest evidence base.
- **Policy E6, Small and Medium-Sized Enterprises (SME):** LBH will encourage the development of affordable accommodation for small and medium-sized businesses in appropriate sustainable locations throughout the borough.

2.48 Since then, the *Local Plan Part 2: Site Allocations and Designations* and *Local Plan Part 2: Development Managements Policies* have been adopted which add detail to the strategic policies identified in *Part 1*. The former identifies both sites to protect and release. The latter sets out policies to assist in the determination of planning applications related to both designated and non-designated employment sites and offices.

2.49 In terms of Designated Employment Sites (i.e. SILs, LSIS, LSEs), Policy DME1 identifies what types of proposal would and would not be supported. It states:

- A. LBH will support employment proposals in SILs - Preferred Industrial Locations (PIL) or Industrial Business Parks (IBP) - in accordance with relevant policies in the London Plan.
- B. LBH will support industrial and warehousing uses (Use Classes B1 (c), B2 and B8) and Sui Generis uses that are appropriate in an industrial area within LSISs.
- C. LBH will support light industrial, office and research & development activities (B1 (a) (b) (c) Use Classes) within LSEs.
- D. Proposals for other uses will be acceptable in SILs, LSEs and on LSIS only where:
 - i) There is no realistic prospect of the land being developed in accordance with criterion A, B or C above; or
 - ii) Sites have been vacant and consistently marketed for a period of 2 years; and,
 - iii) The proposed alternative use does not conflict with the policies and objectives of the *Local Plan*.
- E. Development adjacent to SILs, LSIS and LSEs must be located and/or designed as to not compromise the integrity or operation of employment areas.
- F. Proposals for small scale ancillary development which supports occupiers and the workforce on designated employment sites, such as 'walk to' services including workplace crèches, cafes and small scale food outlets, will be supported.

2.50 For employment sites that are not designated, Policy DME2 states that the loss of floorspace or land will normally be permitted if there is no realistic prospect of the land being used for employment purposes or whether existing uses are unsuitable or negatively impacting local amenity.

2.51 Policy DME3 also sets out that LBH will prioritise Stockley Park and Uxbridge Town Centre for office development and will support proposals for new office development in these locations. Proposals for alternative uses are expected demonstrate that a site has been actively marketed for two years, is no longer viable for office uses and that surrounding employment uses will not be compromised. Beyond these priority locations proposals for smaller scale office floorspace will be supported, and loss will be resisted where possible. Importantly, it identifies that proposals for office uses in LSEs will be permitted as long as they do not result in the loss of light industrial accommodation where there is demand for these uses.

Neighbouring Boroughs' Employment Land Requirements

2.52 A number of Hillingdon's neighbouring boroughs have updated their Local Plans since the last iteration of the *Hillingdon Employment Land Study Update* (2014). Key messages around employment requirements are identified below to provide an overview of wider demand and need:

- **Ealing Draft Local Plan (2022):** The *West London Employment Land Evidence (2019)* study draws on detailed sectoral and local labour demand modelling provided by Oxford Economics to identify industrial floorspace requirements. This contrasts with the *London Industrial Land Demand Study (LILDS) (2017)* which for uses rebased GLA pan-London sector growth rates to project future requirements. Within Ealing, the industrial land needs are summarised from both in their policy documents – West London Evidence: 1.0 ha of industrial need; LILDS (Ha) 35.6 ha of industrial need.
- **Harrow Core Strategy (2012):** The *West London Employment Land Evidence (2019)* also presents the industrial land needs for Harrow. This states there is a need for 2.5 ha for industrial land, whereas the LILDS notes there is a need for 1.2 ha of industrial land.
- **Slough Core Strategy (2006):** The *Eastern Berkshire FEMA Economic Development Needs Assessment (2016)* states that the land requirement for office and industrial in Slough is as follows for the three scenarios considered: Baseline Labour Demand (Industrial 130.2ha, Office 18.6ha), Past Completion Rates (Industrial 74.6 ha, Office 8.4 ha), and Labour Supply (Industrial 157.6ha, Office 22.6ha).
- **Spelthorne Emerging Local Plan (2022):** The *Spelthorne Employment Land Needs Assessment (ELNA) 2022 – 2037* sets out that the borough anticipate that just over 1.8 ha of office and research & development space will be required over the plan period and just under 1.2 ha of B8 warehousing and storage will be required. However it is anticipated that just under 1.1 ha of B2 light industrial floorspace will no longer be required leaving a total B Class requirement of around 1.9 ha over the time period.
- **Three Rivers Local Plan (2014):** The *South West Herts Economic Study Update (2019)* provides information on how much industrial land is needed across Three Rivers. It notes that the need for industrial space in Three Rivers from 2018-2036 is 2.9 Ha.
- **Hounslow Local Plan (2015):** *The Hounslow Employment Land Review 2020* forecast the gross demand for industrial space as some 25.3 Ha over the plan period 2019 – 34. For the extended plan period 2019 – 39, the forecast demand is 29.9 Ha. These figures assume that no existing industrial space is lost in addition to the current pipeline of planning permissions.

Table 1: Neighbouring Boroughs' Employment Land Requirements

	Industrial Need	Plan Period	Sources
LB Ealing	West London Evidence: 1.0 ha of industrial need; LILDS (Ha) 35.6 ha of industrial need.	-	<i>The West London Employment Land Evidence (2019)</i> <i>London Industrial Land Demand Study (LILDS) (2017)</i>
LB Harrow	West London Evidence: 2.5 ha of industrial need; LILDS (Ha) 1.2 ha of industrial need	-	<i>The West London Employment Land Evidence (2019)</i> <i>London Industrial Land Demand Study (LILDS) (2017)</i>
Slough	Baseline Labour Demand – Industrial: 130.2 ha	-	<i>Eastern Berkshire FEMA Economic Development Needs Assessment (2016)</i>
Spelthorne	B Class requirement: 1.9 ha	2022 – 2037	<i>The Spelthorne Employment Land Needs Assessment (ELNA) (2022 – 2037)</i>
Three Rivers	Industrial (Gross Demand): 2.9 ha	2018 – 2036	<i>The South West Herts Economic Study Update (2019)</i>
LB Hounslow	Industrial (Gross Demand): 25.3 ha ; Extended Plan period (2019-39) 29.9 ha	2019 – 2034	<i>The Hounslow Employment Land Review (2020)</i>

3. Demand Context: Exploring Demand Signals for Employment Floorspace

Chapter Summary

This chapter sets out socio-economic and commercial market trends to explore local demand signals as well as current and future drivers of economic growth. Key messages include:

- Hillingdon's population has increased by **+10%** over the last ten years to **305,000** – this is a higher growth rate than most of its immediate neighbours as well as London and the West London Alliance more broadly. The borough is expected to accommodate a *further* **+22,700** people over the next two decades.
- Hillingdon has a lower proportion of residents either in employment or self-employment (**71%**) compared to most of its immediate neighbours as well as London and the West London Alliance. It also has a higher proportion of residents with no qualifications (**19%**) and fewer people with degree-level qualifications (**28%**). This is reflected in the occupational profile which is dominated by mid-range roles.
- Hillingdon has a much larger economy than its neighbours with over **14,300** businesses supporting around **203,000** jobs. This is mainly due to Heathrow which is the largest single-site employer in the country and a major attractor for businesses which cluster in nearby industrial estates (e.g. Hayes Industrial Estate) and town centres (e.g. Uxbridge Town Centre).
- Hillingdon's employment base has not increased over the last decade of available data – this is likely to reflect the significant impact that the COVID-19 pandemic and its associated lockdowns had on Heathrow Airport and its supply chain businesses.
- Hillingdon's employment mix is dominated by the Transport and Storage (**30,000** jobs), Business Administration and Support Services (**28,000** jobs), Health (**16,000** jobs), Professional, Scientific and Technical (**14,000** jobs), Retail (**14,000** jobs) and Education sectors (**14,000** jobs). Notably there are **3.14x** more jobs in Hillingdon's Transport and Storage sector than represented in the national economy.
- Over the past five years (2015-2021) the sectors that have declined in Hillingdon include Professional, Scientific and Technical Activities (**-21%** jobs), Information and Communications (**-14%** jobs), Property (**-14%** jobs) and Transport and Storage (**-10%** jobs). In contrast the biggest growth sectors have been Finance and Insurance (**+20%** jobs), Construction (**+14%** jobs), Accommodation and Food Services (**+12%** jobs) and Business Administration and Support (**+4%** jobs).
- Hillingdon's office market is significantly larger than most of its neighbouring boroughs with **472** office properties.
- Hillingdon's average office rents are **c.£30 psf** which sits just below Hounslow's average of **c.£33 psf**. This is relatively high but rental growth has been weak over the last decade and has flatlined across the past few years. The highest rents are achieved around Hayes, Uxbridge and Heathrow – these are traditional office hubs and have seen newer build / more modern stock come onto the market.
- Hillingdon has high office vacancy rates, which have worsened over the last ten years – unadjusted headline figures currently sit at **15%**, which is 5 percentage points higher than 2013.
- Hillingdon's office market take-up tends to be for units below 5,000 sqft though there is demand for units up to 10,000 sqft, and over 20,000 sqft. This reflects take-up by bluechip multi-nationals.
- Hillingdon's industrial market is larger than its comparator locations, with the exception of Ealing. It comprises **583** properties.
- The local industrial market is overheating and is dominated by demand from the existing aviation industry but also 'last mile' distribution activity as well as data centres.
- Hillingdon's average industrial rents are relatively high at **c.£19.50psf** but slightly below both Hounslow and Ealing's average rents at **c.£20psf**. Hillingdon's industrial rents have strengthened over the last ten years, in line with Ealing, Hounslow, and the West London Alliance as a whole.
- Hillingdon's reported unadjusted industrial vacancy rates saw a low of **2%** in 2019 but this has since increased to **5%** in 2023 – both of these figures are, however, below the GLA's 8% benchmark for a 'healthy' industrial market. The increase in recent years represents, in part, new stock being constructed rather than 'true' vacancy.

- Industrial take-up over the last ten years in Hillingdon (c.500 deals) is half of that of Hounslow (c.1,028 deals), and far below Ealing (c. 828). Agents comment that this is due to Heathrow's activity 'cooling' down – though this is not anticipated to remain as it has a cyclical industrial market.
- Hillingdon's industrial take-up has primarily been for smaller, industrial units of between **2,000 to 10,00sqft**. Whilst this may be the case, there has been strong take up across all size categories including a higher number of deals for larger units over 100,000 sqft category (c.9 deals) than most of its neighbours.

Socio-Economic Conditions

National Picture

- 3.1 England and Wales' population has increased by **+6%** since 2011 to around **59.6m** according to the most recent Census⁵. The places that have seen the greatest rises are the South East (+643k), London (+625k) and East of England (+488k). Projections indicate that the population could reach **71m** by 2045 with growth expected across the whole country⁶.
- 3.2 Since 2011 the population has continued to age with around **18.6%** of England's residents now 65 or older versus **16.5%** at the previous Census. This is expected to continue further with projections indicating that this will rise to **24%** by 2043⁷.
- 3.3 In line with this, the United Kingdom's (UK) economy has grown significantly over the last decade as it emerged from the Global Financial Crisis in 2008. Gross Domestic Product (GDP) has increased by **+16%** since 2011 to **\$3.13tn**⁸ which has been accompanied by a continued fall in the unemployment rate which now sits at **3.7%** - one of the lowest rates in history⁹.
- 3.4 The broad economic sectors that have grown the most during this period are (see Figure 4)¹⁰:
- Health which has 348,000 more jobs than in 2015 (+10%).
 - Professional, Scientific & Technical which has 259,000 more jobs than in 2015 (+10%).
 - Transport & Storage which has 223,000 more jobs than in 2015 (+16%).
 - Accommodation & Food Service which has 196,000 more jobs than in 2015 (+10%)
 - Construction which has 156,000 more jobs than in 2015 (+12%).
 - Information & Communications which has 124,000 more jobs than in 2015 (+10%).
- 3.5 These sectors have been boosted by a wide range of factors ranging from the country's growing and ageing population to the acceleration of e-commerce and automation following the COVID-19 pandemic.
- 3.6 In contrast the broad economic sectors that have declined the most during this period are:
- Retail which has -71,000 fewer jobs than in 2015 (-3%).
 - Wholesale which has -69,000 fewer jobs than in 2015 (-7%).
 - Manufacturing which has -53,000 fewer jobs than in 2015 (-3%).
 - Arts, Entertainment and Recreation which has -9,000 fewer jobs than in 2015 (-1%).
 - Motor Trades which has -6,000 fewer jobs than in 2015 (-1%).

⁵ ONS Census, 2021.

⁶ ONS Population Projections, 2022.

⁷ Ibid.

⁸ World Bank National Accounts, 2021.

⁹ ONS Employment in the UK, 2023.

¹⁰ The Office for National Statistics (ONS) changed their methodology for collecting employment data in 2015 so it is not possible to look at trends back to 2011 without manipulating the datasets using broad assumptions.

3.7 This is similarly influenced by different factors ranging from the decline in bricks and motor retail to the decision to leave the European Union.

3.8 Since 2020, however, the national economy has stalled due to three broad factors:

- The impact of the COVID-19 pandemic and its associated public health restrictions on business activity and consumer purchasing.
- The impact of the decision to leave the European Union (EU) on both trading and migration patterns.
- The impact of the conflict between Russia and Ukraine on commodity prices (i.e. energy, food and other supplies).

3.9 These macro-economic forces have pushed the country towards a recession characterised by falling GDP and rising inflation as reflected in the Consumer Price Index. The Bank of England have responded by increasing the base interest rate to **4.25%** to slow inflation - this is expected to increase further in 2023 as inflation continues apace with reductions in 2024 and 2025. Moving forward the Office for Budget Responsibility (OBR) project that real GDP will fall by **-0.23%** in 2023 before returning positive in 2024 and reaching **+2.5%** in 2025¹¹.

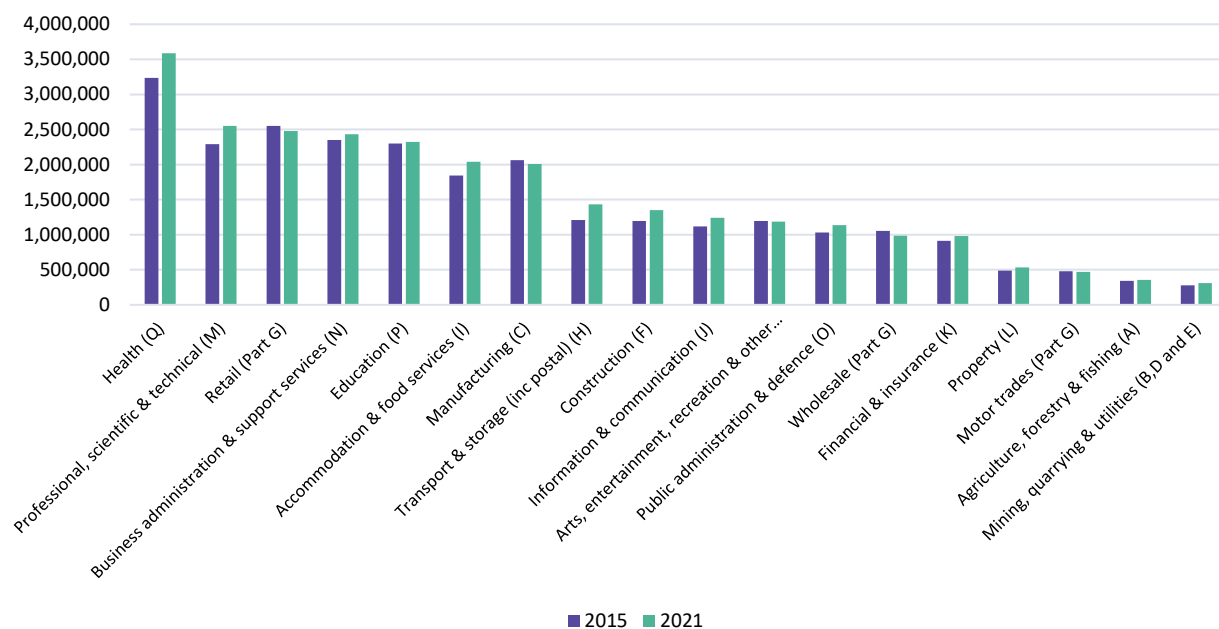


Figure 4: UK Employment by Broad Sector (2015 and 2021)

Source: ONS Business Register and Employment Survey (2022)

Hillingdon's Population

3.10 At the local level, Hillingdon is characterised by a large, diverse and growing resident population. The latest Census indicates that there are around **305,000** people living in the borough which is **+10%** more than in 2011 (see Table 1). This means Hillingdon has experienced a greater proportional population increase than most of its immediate neighbours over this period, bar Slough (+11%) and Hounslow (+11%), as well as London (+7%), the West London Alliance¹² (+8%) and the country (+6%) as a whole.

3.11 Hillingdon's population is concentrated in its more urban areas which are in the middle and southern end of the borough. As Figure 5 shows, the highest population densities are in places like Uxbridge, Cowley, West Drayton, Hayes and Ruislip which are characterised by a mix of medium and high-density housing types. Most of these areas have also seen among the greatest population increases since 2011 reflecting, in part,

¹¹ Office for Budget Responsibility, Economic and Fiscal Outlook, March 2023.

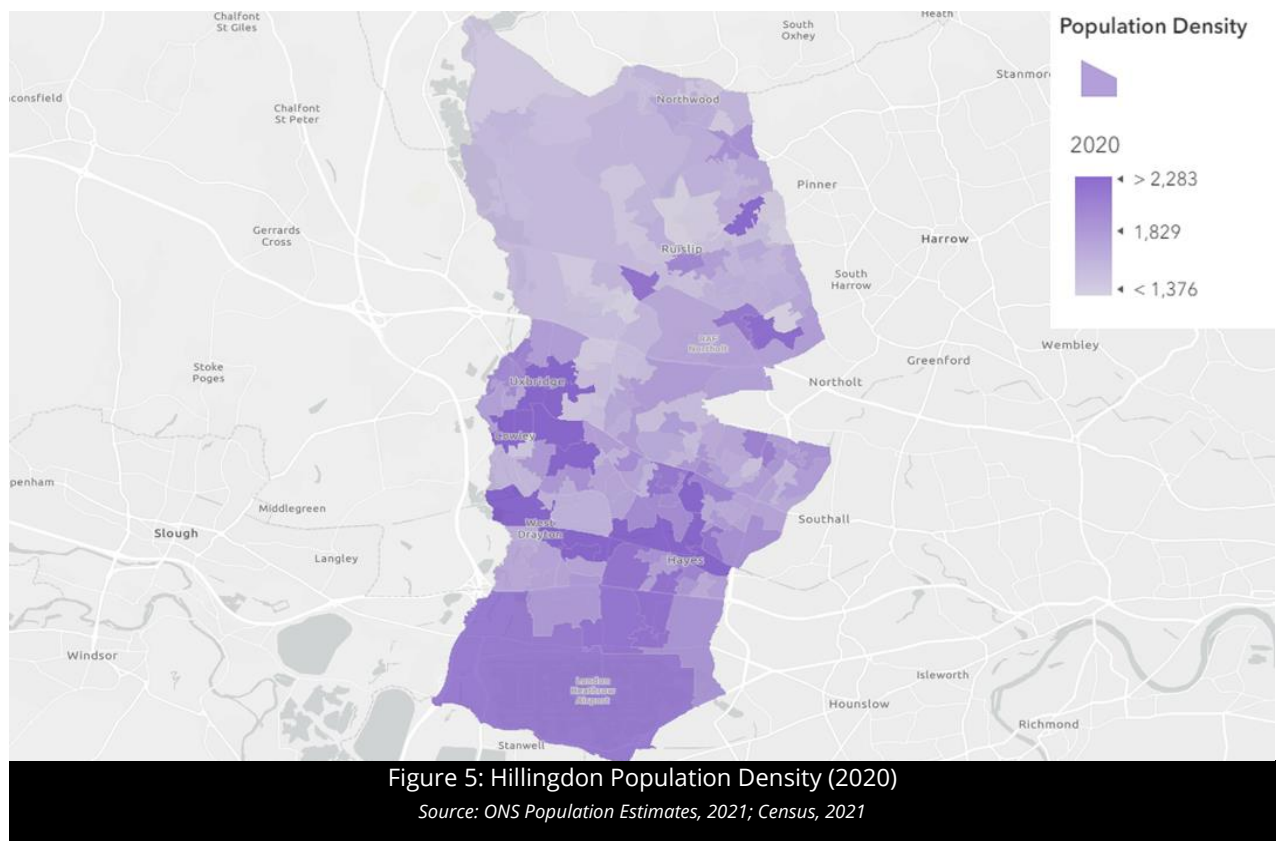
¹² The West London Alliance geography incorporates the London Boroughs of Barnet, Brent, Ealing, Hammersmith & Fulham, Harrow, Hillingdon and Hounslow.

higher levels of housing development (see Figure 6) – examples of high-profile schemes that have partially or fully come forward during this period include:

- St Andrew's Park, Uxbridge (1,300 new homes).
- Hayes Village, Hayes (1,500 new homes).
- Drayton Garden Village, West Drayton (775 new homes).
- Highfield Court, West Ruislip (415 new homes).
- High Point Village, Hayes (600 new homes).
- Old Vinyl Factory, Hayes (600 New Homes).
- Padcroft Works, West Drayton (300 New Homes).

3.12 The borough's most northern areas have much lower population densities corresponding with their rural and green belt characteristics, and most have seen a decrease in population since 2011.

3.13 The age profile of this resident population reflects the borough's Outer London location – as shown in Figure 7, there is lower proportion of 'younger' working-aged people (aged 20-35) versus the London average but a strong representation of more mature working age adults (aged 35-60) and children (aged 0-19). Unlike some Outer London boroughs, the proportion of people at retirement age (aged 65+) is however in line with the London average.



3.14 Moving forward, projections from the Office for National Statistics (ONS) indicate that Hillingdon's population will increase by over +22,700 over the next two decades which represents a +7.4% increase versus the baseline (Table 2)¹³. This is significantly more than the borough's neighbours which are expected to see more modest levels of growth – notably Hounslow (+10,487), Harrow (+5,195), Slough (+3,370) and Spelthorne (+2,310). Projections also indicate that the 65+ age group will see by the greatest proportional increase over this period (+37%) with the working age population only expected to rise by +2% (Figure 8). Similar trends are expected across the borough's neighbours and the wider West London Alliance geography.

¹³ ONS Population Estimates, 2021. N.B. These are trend-based projections, which means assumptions for future levels of births, deaths and migration are based on observed levels over the past five years.

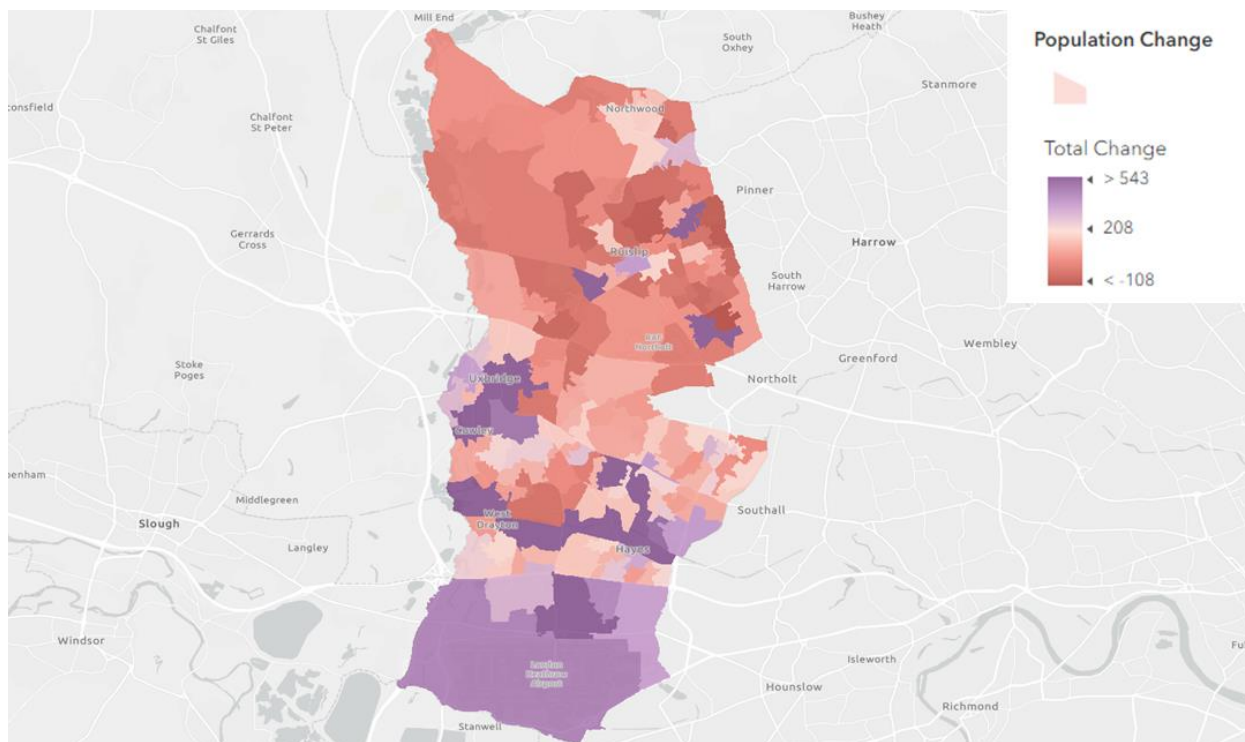


Figure 6: Hillingdon Population Change (2011-2021)

Source: ONS Population Estimates, 2021; Census, 2021

Table 2: Population Growth by Borough

	LB Hillingdon	LB Ealing	LB Harrow	Slough	Spelt-horne	Three Rivers	LB Hounslow	West London Alliance	London
2011	275,499	339,314	240,499	140,713	95,852	87,921	254,927	1,962,467	8,204,407
2021	304,792	366,127	260,987	158,289	102,995	93,952	287,940	2,130,698	8,796,628
Total Growth	+29,293	+26,813	+20,488	+17,576	+7,143	+6,031	+33,013	+168,231	+592,221
% Growth	+10%	+7%	+8%	+11%	+7%	+6%	+11%	+8%	+7%

Source: ONS Population Estimates, 2021; Census, 2021

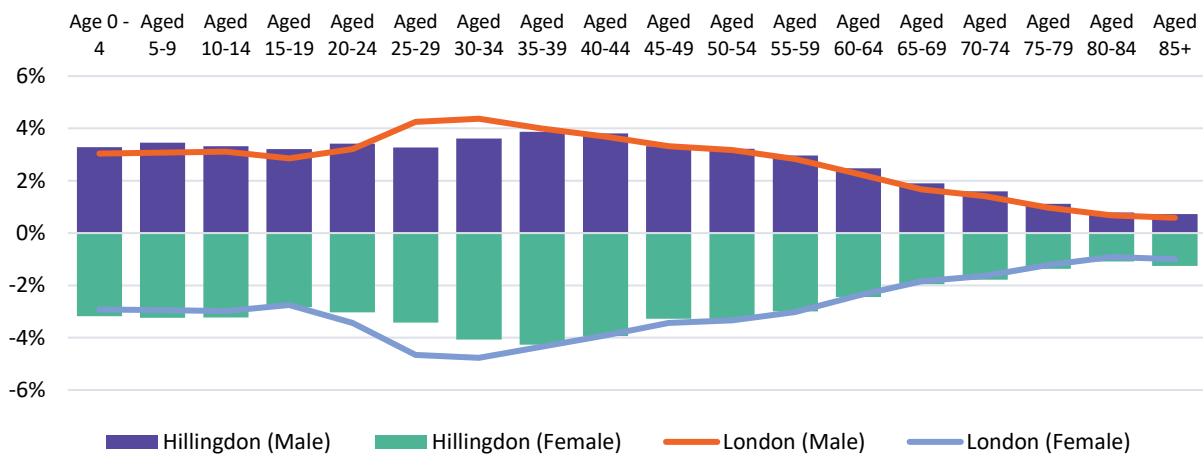


Figure 7: Hillingdon Age Profile versus London (2021)

Source: ONS Population Estimates, 2021; Census, 2021

Table 3: Projected Population Change by Borough (2018-2043)

	LB Hillingdon	LB Ealing	LB Harrow	Slough	Spelthorne	Three Rivers	LB Hounslow	West London Alliance	London
2018	304,824	341,982	250,149	149,112	99,334	93,045	270,782	2,076,098	8,908,081
2043	327,532	337,792	255,344	152,482	101,644	94,120	281,269	2,210,461	9,814,032
Difference	+22,708	-4,190	+5,195	+3,370	+2,310	+1,075	+10,487	+134,363	+905,951
% Change	7.4	-1.2	2.1	2.3	2.3	1.2	3.9	6.5	10.2

Source: ONS Population Estimates, 2021; Census, 2021

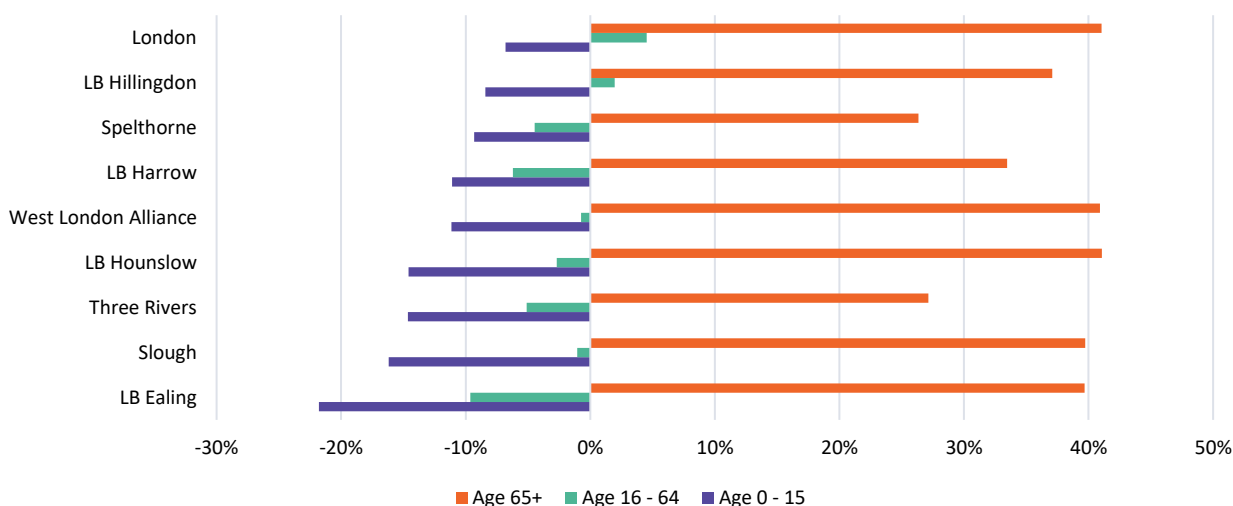


Figure 8: Projected Population Growth By Age Group (2018-2043)

Source: ONS Population Projections, 2021

Hillingdon’s Labour Market

3.15 Despite having a dynamic and growing population, Hillingdon has a lower proportion of residents that are either in employment or self-employment (**71%**) versus most of its neighbours, as well as London (**75%**) and the West London Alliance (**74%**) more broadly (see Figure 9). Current figures are **3** percentage points higher than ten years ago representing positive progress (see Figure 10), but the borough still underperforms against most of its neighbours on this metric. The recent impacts of COVID-19 on Heathrow Airport and its supply chain businesses may be reflected in these figures given they have traditionally provided high levels of employment for local residents.

3.16 These figures may also link to that fact that Hillingdon has a slightly higher proportion of residents with no qualifications compared to many of its neighbours and the London and West London Alliance averages – **19%** versus 18% across London, 18% in Three Rivers, 17% in Hounslow, 17% in Harrow, 17% in Ealing and 17% across the West London Alliance. Hillingdon also has a significantly lower proportion of people with degree-level qualifications (Level 4+) compared to many of its neighbours, as well as across London and West London Alliance more broadly – **28%** are qualified to this level versus 34% in Three Rivers, 35% in Hounslow, 37% in Harrow, 37% in Hounslow, 37% across the West London Alliance and 38% in London (see Figure 11).

3.17 This qualification profile is reflected in the borough’s occupational profile which is characterised by a relatively low proportion of residents (**7%**) working in Manager, Director or Senior Director roles versus its neighbours (see Table 3). Most people in Hillingdon are engaged in mid-range roles such as Professional Occupations (**30%**), Associate Professional Occupations (**13%**) and Administrative and Secretarial Occupations (**15%**). This translates to a median gross salary of **£34,149** for the borough and annual mean salary of **£37,670**, both of which represent a **+18%** and **+16%** increase versus 2012 (see Table 5).

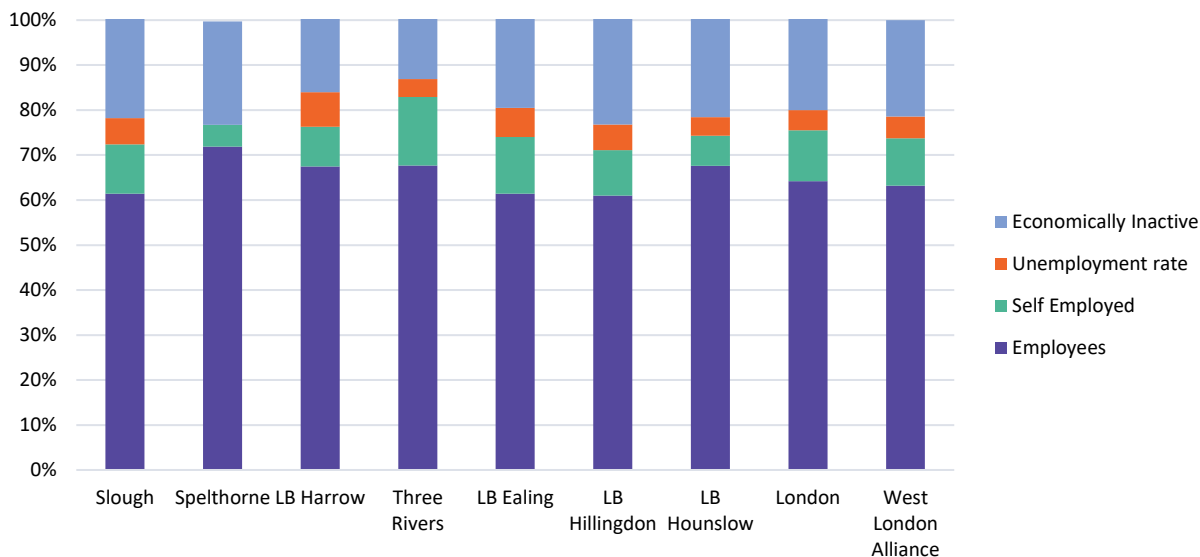


Figure 9: Economic Activity by Borough (2021)
 Source: ONS Population Estimates, 2021; Census, 2021

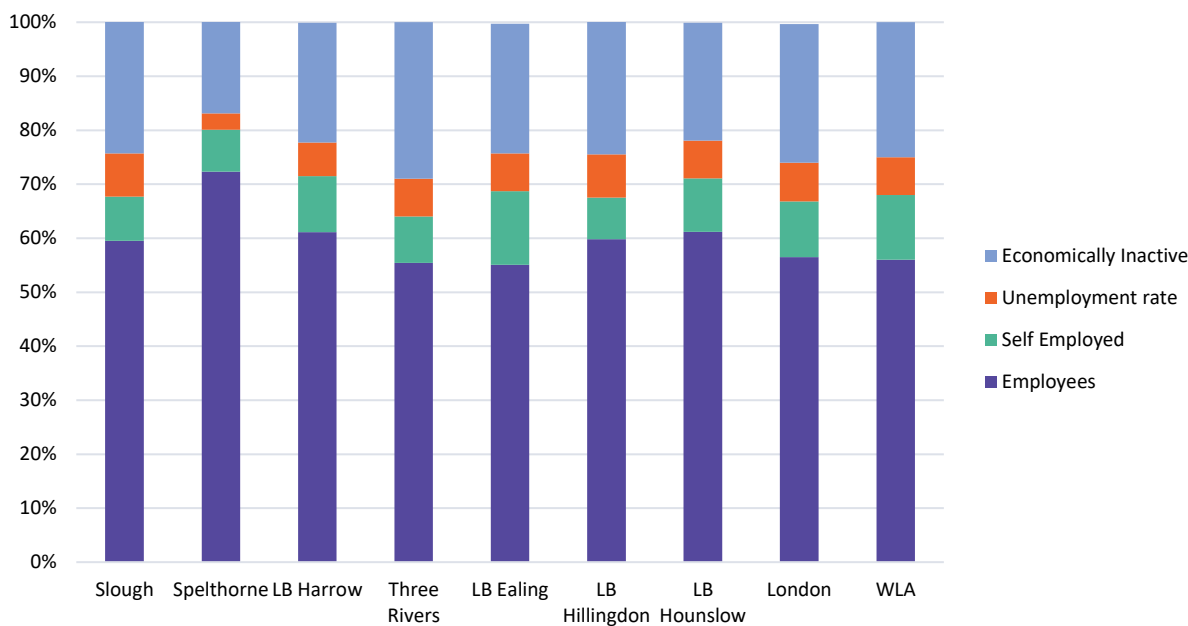


Figure 10: Economic Activity by Borough (2011)
 Source: ONS Population Estimates, 2021; Census, 2021

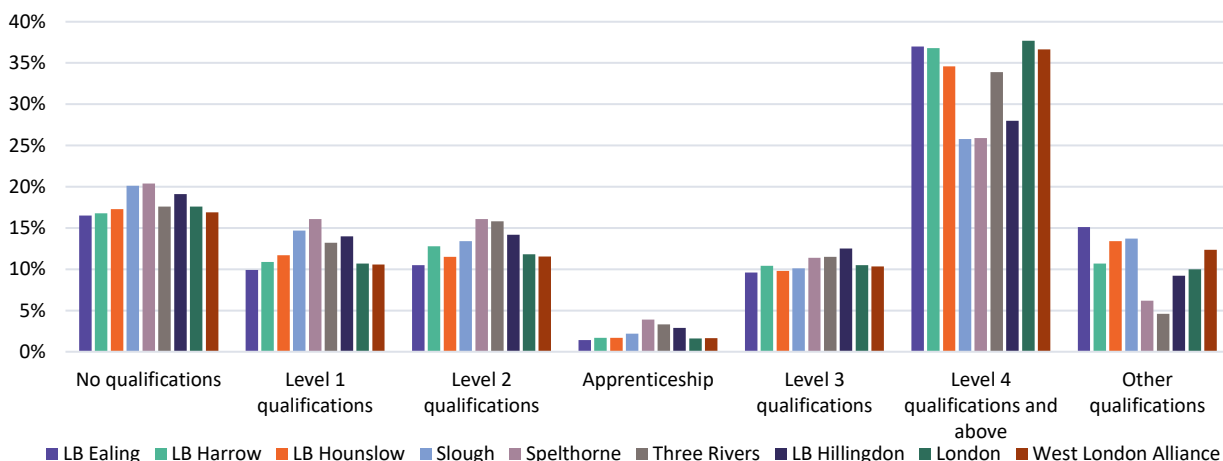


Figure 11: Qualification Levels by Borough (2021)
 Source: ONS Population Estimates, 2021

Table 4: Occupational Profile by Borough (2021)

	Managers, directors and senior officials	Professional occupations	Associate professional occupations	Administrative and secretarial occupations	Skilled trades occupations	Caring, leisure and other service occupations	Sales and customer service occupations	Process, plant and machine operatives	Elementary occupations
LB Hillingdon	7%	30%	13%	15%	8%	8%	6%	5%	9%
LB Ealing	16%	34%	16%	10%	5%	9%	5%	2%	4%
LB Harrow	11%	42%	15%	8%	4%	6%	5%	1%	8%
Slough	7%	19%	11%	11%	12%	11%	4%	9%	14%
Spelthorne	7%	29%	16%	13%	7%	4%	12%	6%	6%
Three Rivers	13%	36%	14%	12%	7%	8%	4%	2%	4%
LB Hounslow	11%	23%	17%	13%	9%	5%	6%	4%	12%
West London Alliance	12%	32%	16%	10%	6%	8%	5%	3%	7%
London	12%	34%	17%	9%	6%	6%	5%	3%	7%

Source: ONS Population Estimates, 2021

Table 5: Annual Average Gross Pay by Borough (2011-2022)

	Median	Change 2012 - 2022 (%)	Mean	Change 2012 - 2022 (%)
LB Hillingdon	£34,149	+18%	£37,670	+16%
LB Ealing	£30,941	+14%	£41,949	+23%
LB Harrow	£31,935	+20%	£37,118	+18%
Slough	£30,694	+19%	£35,155	+26%
Spelthorne	-	-	£38,810	+12%
Three Rivers	£32,665	+24%	£43,085	+16%
LB Hounslow	£31,104	+17%	£37,964	+15%
West London Alliance	£32,768	+18%	£40,860	+17%
London	£33,970	+18%	£44,190	+16%

Source: ONS Population Estimates, 2021

Hillingdon's Economy

- 3.18 Even though the borough has a lower proportion of residents that are either employed or self-employed compared to most of its neighbours, it has a *much* larger economy. In total Hillingdon has over **14,300** businesses that support **c203,000** jobs which is significantly more than in Hounslow (174,000 jobs), Ealing (158,000 jobs), Slough (94,000 jobs), Harrow (85,000 jobs), Three Rivers (50,000 jobs) and Spelthorne (43,000 jobs) (see Table 6). Unlike its neighbours it also has a job density figure over one, which means that there is more than one job in the area for every resident of working age (see Figure 12).
- 3.19 These trends are mainly due to the presence of Heathrow Airport in the south of the borough which is the largest single-site employer in the country – prior to the pandemic it provided over **75,000** jobs on-site and a further **40,000** jobs across its local supply chain¹⁴. This is highlighted in Figure 13 which shows a high concentration of employment around Heathrow, as well as nearby employment sites that support the airport or benefit from its proximity (e.g. Stockley Park and Hayes Industrial Area).
- 3.20 Another important employment node is Uxbridge which is home to many established businesses that have their headquarters in and around the town centre – examples include Coca-Cola, Hertz, Herbalife, GiffGaff, General Mills, and Mitsubishi Electric. The area also has some relatively large industrial areas, including the Uxbridge Industrial Estate and North Uxbridge Industrial Estate, and is close to Brunel University which is a major local employer.
- 3.21 Unlike its neighbours Hillingdon's employment base has not, however, grown over the last decade of available data – neighbours have seen between +5 and 26% growth over the same period (Spelthorne and Three Rivers respectively).
- 3.22 This is likely to reflect the significant impact that the COVID-19 pandemic and its associated lockdowns had on Heathrow Airport and its supply chain businesses – a report commissioned by the West London Alliance shows that the slowdown in both passenger and cargo volumes at Heathrow Airport saw Gross Value Added (GVA) fall by **-23%** across West London's air transport sector in 2020 alone alongside thousands of job losses¹⁵. These are likely to have counterbalanced by gains in other parts of the borough's employment base.
- 3.23 This is seen spatially in Figure 14 which shows Hillingdon's employment change over time. It is clear that the number of jobs has fallen in and around Heathrow, but there has been growth in other parts of the borough – notably in areas with an industrial presence (e.g. Hayes, Harlington, Ruislip, Uxbridge and Ruislip).
- 3.24 In terms of its broad sector mix, the borough's biggest industries in terms of employment are (see **Table 8**):
- Transport and Storage: **30,000** jobs (-10% lower than in 2015).
 - Notable employers include: Heathrow Airport (Heathrow), British Airways (Heathrow), Menzies Aviation (Heathrow), DHL (West Drayton), UPS (Uxbridge), TNT (Hayes), DPD (Uxbridge), CEVA Logistics (West Drayton) and FedEx (Uxbridge).
 - Business Administration and Support Services: **28,000** jobs (+4% higher than in 2015).
 - Notable employers include: G4S (Uxbridge), Avarto (Uxbridge), Capita (Uxbridge), Addecco (Uxbridge), Ranstad (Uxbridge) and Job Centre Plus (Uxbridge).
 - Health: **16,000 jobs** (+6% higher than in 2015).
 - Notable employers include: Hillingdon Hospitals NHS Foundation Trust (Various), Hillingdon Primary Care Trust (West Drayton), Hillingdon Clinical Commissioning Group (Uxbridge), Hillingdon Mind (Uxbridge) and Age UK Hillingdon (Uxbridge).
 - Professional, Scientific and Technical Activities: **14,000** jobs (-21% lower than in 2015).
 - Notable employers include: Fujitsu (Uxbridge), Siemens (Uxbridge), Oracle (Uxbridge), Xerox (Uxbridge), Cognizant (Uxbridge), ADP (Stockley Park), GSK (Stockley Park) and Accenture (Hayes), Canon Europe (Stockley Park).
 - Retail: **14,000 jobs** (-7% lower than in 2015).

¹⁴ Heathrow Airport, Heathrow: Best Placed for Britain.

¹⁵ West London Alliance, How Has Coronavirus Impacted the Economy of West London.

- Notable employers include: Tesco Extra (Hayes), B&Q (Ruislip), Next Home and Gardens (Hayes), the Range (Hayes), Poundland (Uxbridge), Currys PC World (Hayes), Aldi (Ruislip), Matalan (Hayes), Marks and Spencer (Stockley Park), Sainsbury's (Ruislip) and TK Max (Uxbridge).
- Education: **14,000** jobs (0% change versus 2015).
 - Notable employers include: Brunel University (near Uxbridge), Uxbridge College (Uxbridge), The Skills Hub (Uxbridge), London International College of Business and Technology (Uxbridge), Buckinghamshire New University (Uxbridge) and QA Ltd (Uxbridge).

3.25 Two of these sectors are 'specialised' versus the national economy:

- There are **3.14x** more jobs in the Transport and Storage sector than represented in the national economy.
- There are **1.73x** more jobs in the Business Administration and Support Services sector than represented in the national economy.

3.26 Other 'specialised' sectors that have smaller employment bases include:

- There are **1.37x** more jobs in the Wholesale sector than represented in the national economy.
- There are **1.23x** more jobs in the Accommodation and Food Services sector than represented in the national economy.

3.27 Both of these relate to the presence of Heathrow.

Table 6: Employment by Borough (2011–2021)

	2011 Total Employment	2021 Total Employment	% Change (2011-2021)
LB Hillingdon	202,000	203,000	0%
LB Ealing	148,000	158,000	+6%
LB Harrow	76,000	85,000	+11%
Slough	87,000	94,000	+7%
Spelthorne	41,000	43,000	+5%
Three Rivers	37,000	50,000	+26%
LB Hounslow	150,000	174,000	+14%
London	5,028,000	6,165,000	+18%
West London Alliance	978,000	1,095,000	+11%

Source: ONS BRES, 2021

- 3.28 In terms of trajectory, the sectors that have seen the largest declines since 2015 are Professional, Scientific and Technical Activities (-21% jobs), Information and Communications (-14% jobs), Property (-14% jobs) and Transport and Storage (-10% jobs). These trends buck what is happening at the national level where all of these sectors have grown at pace (see Figure 4). While some of these are likely to relate to the temporary impact of COVID-19 on Heathrow this may reflect a more fundamental shift in the makeup of the local economy.
- 3.29 PMA reports that over the COVID-19 pandemic (2020 to 2021), there were four major employment contractions in Hillingdon as set out in Table 7 below. BA's decision to downsize could have been exacerbated by COVID-19's impact on the industry as a whole. In terms of the other major moves, it may be that those businesses have moved out of London, to more affordable premises or to locations/premises that better meet their requirements.

Table 7: Employment Contractions

Name	Sector	Number	Date	Comments
GlaxoSmithKline	Manuf	-c2000	2020	Out-mover. GSK moved all employees to Brentford HQ.
Heathrow Airport Holdings (formerly BAA)	Services	-c450	2020	Contraction. Roles lost in head office.
Pladis (formerly United Biscuits)	Manuf	-c450	2021	Out-mover. Moved HQ to Chiswick Park.
PwC	F&BS	-c450	2021	Out-mover. Moved to new Watford office in merger of St Albans and Uxbridge centres.

Source: PMA, 2023

3.30 Sectors that have expanded include Financial and Insurance (+20% jobs), Construction (+14% jobs), Accommodation and Food Services (+12% jobs) and Business Administration and Support (+4% jobs). These are all growth sectors at the national level as well.

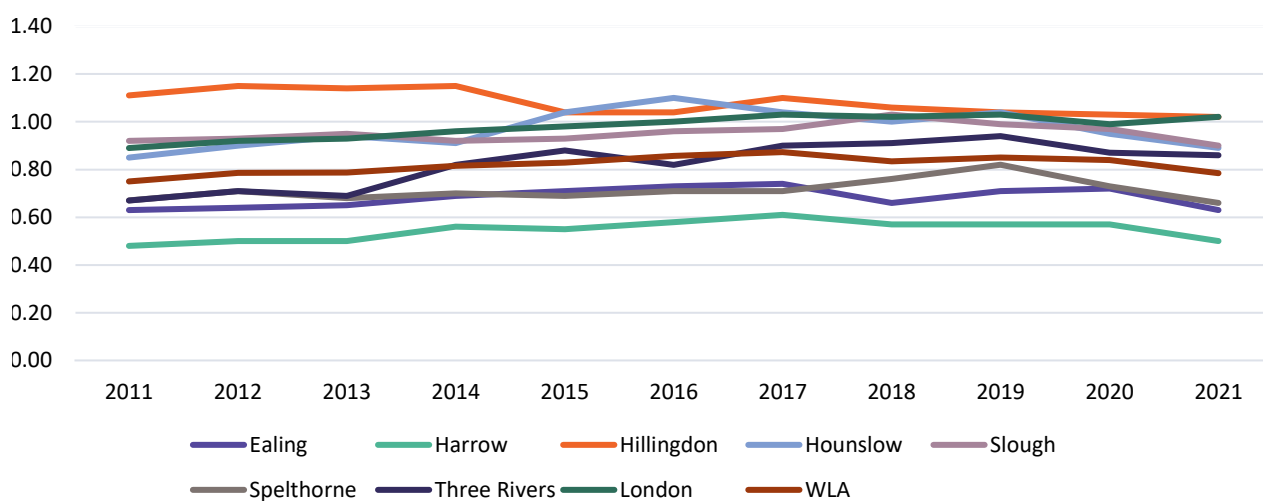


Figure 12: Job Density by Borough (2011-2021)

Source: ONS Job Density, 2021

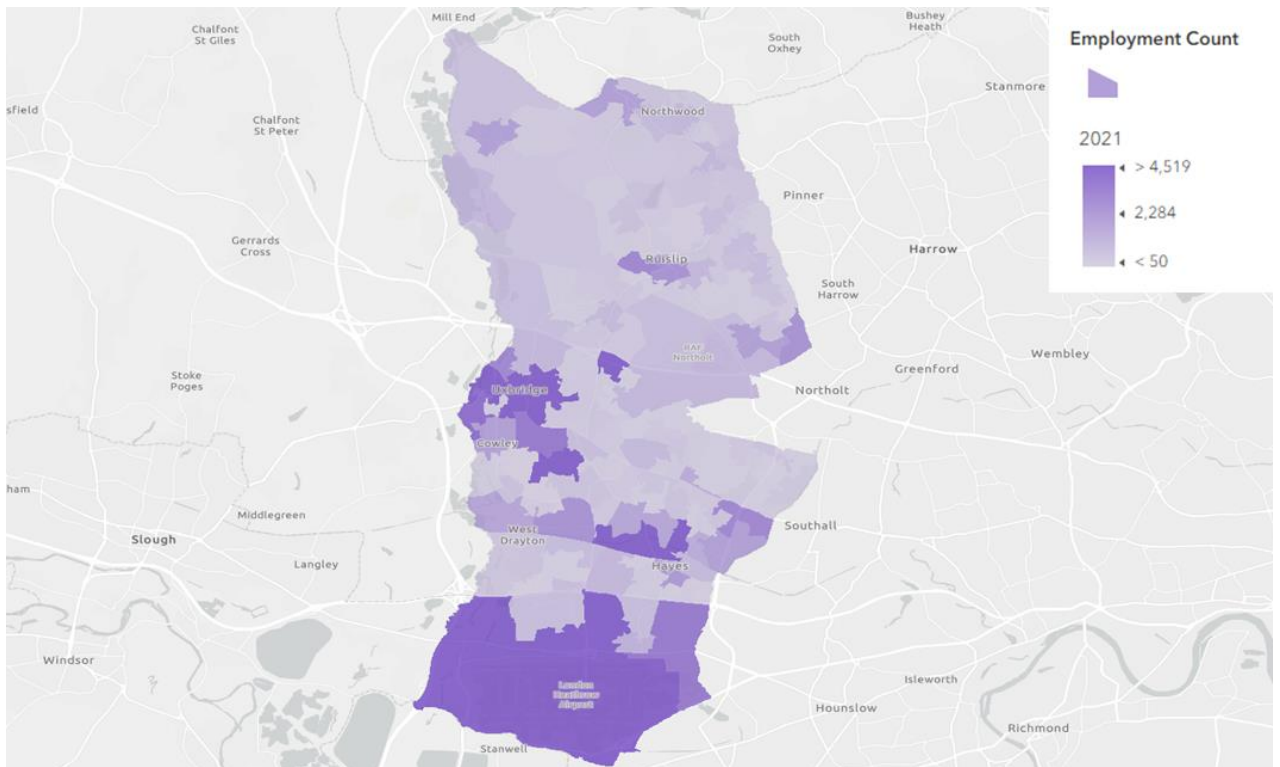


Figure 13: Employment Distribution (2021)

Source: ONS BRES, 2021

Note: Employment refers to local jobs within businesses based in the borough.

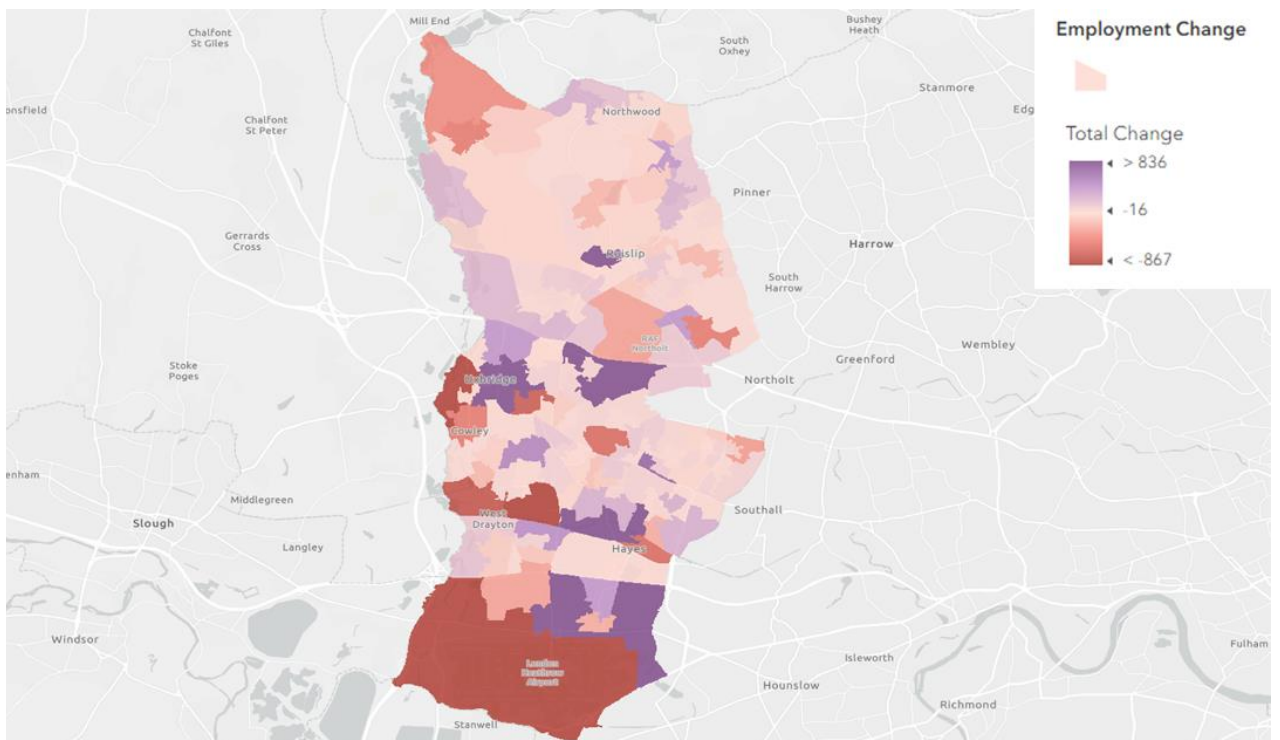


Figure 14: Hillingdon Employment Change (2011-2021)

Source: ONS Population Estimates, 2021

Note: Employment refers to local jobs within businesses based in the borough.

Table 8: Hillingdon Employment by Sector (2015–2021)

Type	2015	% of Total	2021	% of Total	Change (Actual)	Change (%)	Location Quotient
Agriculture, forestry & fishing (A)	125	0%	150	0%	+25	+17%	0.06
Mining, quarrying & utilities (B,D and E)	1,250	1%	1,250	1%	0	0%	0.60
Manufacturing (C)	7,000	4%	7,000	4%	0	0%	0.52
Construction (F)	6,000	3%	7,000	4%	+1000	+14%	0.78
Motor trades (Part G)	2,500	1%	2,500	1%	0	0%	0.79
Wholesale (Part G)	9,000	5%	9,000	5%	0	0%	1.37
Retail (Part G)	15,000	8%	14,000	8%	-1000	-7%	0.85
Transport & storage (inc postal) (H)	33,000	18%	30,000	16%	-3000	-10%	3.14
Accommodation & food services (I)	15,000	8%	17,000	9%	+2000	+12%	1.25
Information & communication (J)	8,000	4%	7,000	4%	-1000	-14%	0.85
Financial & insurance (K)	2,000	1%	2,500	1%	+500	+20%	0.38
Property (L)	2,000	1%	1,750	1%	-250	-14%	0.49
Professional, scientific & technical (M)	17,000	9%	14,000	8%	-3000	-21%	0.82
Business administration & support services (N)	27,000	14%	28,000	15%	+1000	+4%	1.73
Public administration & defense (O)	8,000	4%	7,000	4%	-1000	-14%	0.92
Education (P)	14,000	8%	14,000	8%	0	0%	0.90
Health (Q)	15,000	8%	16,000	9%	+1000	+6%	0.67
Arts, entertainment, recreation & other services (R,S,T and U)	4,500	2%	4,500	2%	0	0%	0.57
Total	186,375		182,650		-3725	-2%	

Source: ONS BRES, 2021

Commercial Market Trends

National Office Picture

- 3.31 The economic downturn and shift to remote working precipitated by the COVID-19 pandemic reduced demand for office space over the short-term. Demand is, however, a complex issue influenced by a wide range of factors such as financial returns, population growth, technology, economic growth, culture and productivity. Evidence relating to these factors led to a consensus among commentators that demand for office space was likely to rebound moving into the 'post-COVID' period.
- 3.32 These expectations have been borne out over the last twelve months – Avison Young's most recent *Economic and Property Market Review* (2023) shows that central London's office market take-up reached **13m** sqft in 2022 which is more than the 12.3m sq ft taken up in 2019 – the vacancy rate also declined from 7.7% in Q3

to **7.3%** in Q4. Similarly, the Big Nine Regional city markets¹⁶ saw **8.2m** sqft taken up in 2022 which is close to the 8.9m sq ft taken up in 2019.

3.33 This recovery is, however, expected to stall over the short-term due to inflation, rising interest rates and the energy crisis. Together, these factors are creating a more challenging environment for the investment market with both occupiers and investors alike taking a more stringent view of current and future opportunities.

3.34 While there is a mixed picture in relation to overall demand, the changing working patterns introduced during the COVID-19 pandemic have had a definite impact on the nature of demand. This is because most employees and employers recognise the personal and productivity benefits of remote working, but generally agree that it does not provide the community, collaboration and development opportunities offered by in-person interaction experienced in offices.

3.35 This has led to a rise in hybrid working as the 'new norm' (i.e. a mix of home and in-person working) which has pushed many businesses to look for more flexible commercial space that suits this new working pattern – an occupier survey undertaken by Colliers International¹⁷ suggests that around **77%** of office employers have shifted to a 'hybrid format' compared to 20% pre-pandemic. These shifts are causing occupiers and investors to focus more on wellbeing, collaboration and experience when considering office space rather than a traditional narrower focus on size and location.

3.36 This is captured in Avison Young's *Fit for the Future: The Impact of COVID-19 on Workplace and Portfolio Strategies (2021)* research¹⁸ which highlights that employee wellbeing is now at the forefront of occupiers' minds. Employers recognise that remote working has been good for many people, but that employees need to be in the office on a flexible basis to improve their wellbeing and to interact more closely with colleagues and friends. Survey evidence from ISG¹⁹ suggests that employees believe that spending around two days in an office per week is optimal for wellbeing.

3.37 This shifting trend is summarised by New London Architecture:

"While businesses are very likely to retain some form of physical office as a base for their community, we should expect this to be combined with higher levels of remote working than ever before. Offices, as a result, will have to adapt, functioning more as data centres... that empower people working outside of the central office, while also maintaining a culture of collaboration that was so central to open-plan offices and co-working spaces".

3.38 The upshot of this is that the nature of space requirements is starting to shift with occupiers increasingly looking for high-quality flexible space that can respond rapidly to changing business needs, support employee wellbeing and enable collaboration. Rather than looking for large, fixed spaces many occupiers are seeking space that meets their core needs but also allows them to hire more desks or collaboration space when required. The following factors are expected to be important to office occupiers over the next few years:

- Flexible lease terms.
- Access to co-working/touch down space.
- Access to space to meet and collaborate.
- Access to temporary 'project' space.
- Spaces that are adaptable.
- More desk space per head.
- A variety of breakout spaces.
- Enhanced audio-visual technology to support hybrid working patterns.
- Good quality ventilation and air filtration.
- Thorough communal hygiene arrangements built into leases.

¹⁶ Birmingham, Bristol, Cardiff, Edinburgh, Glasgow, Leeds, Liverpool, Manchester, and Newcastle.

¹⁷ Colliers International, Office Recovery – The Great Experiment (2021).

¹⁸ Avison Young's *Fit for the Future: The Impact of COVID-19 on Workplace and Portfolio Strategies (2021)*.

¹⁹ ISG's Power of Place Survey (2020).

- Well-connected locations near to public transport and local amenities.
- 3.39 Not included on the above list, but a key consideration in Hillingdon's context is the provision of car parking. There is no 'one size fits all' approach here, but given the public transport connectivity in some locations across the borough, the inclusion of car parking spaces will be an important factor to occupiers' 'attractiveness' and operations. Where this applies could be Stockley Park for example. Increasingly, there are shifts towards collectivisation of car parks, to make more efficient use of employment sites.
- 3.40 Additionally, the following trends have started to emerge:
- The average lease period for office space across central London has become shorter and has dropped below five years for the first time²⁰. While this is not a new trend, this milestone underpins the continued demand for flexibility from central London office occupiers.
 - For the first half of 2023, the four largest office deals across the country were for high quality new space. CBRE also anecdotally report that prime high-quality space is currently letting more quickly than older secondary stock²¹.
 - Avison Young's agents report that supporting/ancillary facilities are becoming more important to attract workers back into the office and to support collaboration and employee wellbeing. Facilities that are becoming more desirable include outdoor space, event/exhibition spaces, creches, cafés etc.
- 3.41 It is worth noting that access to good technology and high-speed broadband connectivity is an essential enabler of hybrid working. The right digital infrastructure is crucial to link people working remotely to those in offices. Businesses will need to invest in technology to stay connected and in smart solutions to increase security while reducing inefficiencies and costs. Employees are starting to expect a seamless experience from their physical and virtual workplaces with the integration of remote workers into meetings and conversations. This ultimately feeds into and impacts the quality of fit-out expected.
- 3.42 The geography of demand for office space is also starting to shift in response to the impacts of COVID-19 pandemic. Major urban centres are still driving demand due to their inherent attractors (i.e. economic opportunities, social connections and amenity offer), but some employers are looking to locate parts of their office portfolio in suburban or satellite locations closer to where employees live in response to the rise in remote working. This could have a real impact on local high streets and neighbourhoods – particularly those with public transport connections into central London. In relation to the above (and London in particular), the Local Enterprise Action Partnership (LEAP)²² write:
- "Remote working gives rise to the viability of 'hub and spoke' flexible workspace hubs across the city. Outer London's high streets can benefit from this latent demand, with the end of line stations in particular being able to serve their residential neighbourhoods, as well as their wider commuter catchments".*
- 3.43 This chimes with Avison Young's occupier survey²³, which indicates that one fifth of respondents anticipate that they will disperse their office portfolios to be closer to where their workforce lives and want to work. It is anticipated that liveable, well-connected suburbs and towns with easy access into urban centres will benefit most from this shift in demand.

Hillingdon's Office Picture

- 3.44 Hillingdon itself has two major office submarkets - Uxbridge forms a 'town centre submarket' and the office areas around Heathrow airport make up an 'out-of-town submarket', most notably Stockley Park:
- Uxbridge is located 19 miles north west of Central London and is served by both the Metropolitan and Piccadilly London Underground lines – it is also less than a ten-minute drive from the M40 and M25.

²⁰ Colliers, Top 5 Trends for London Offices (2023).

²¹ CBRE, UK Real Estate Market Outlook (2023).

²² LEAP, Flexible Workspace on Our High Streets (2021).

²³ Avison Young, Fit for the Future: The Impact of COVID-19 on Workplace and Portfolio Strategies (2021e).

- The 'out-of-town' office areas are similarly closely served by the M3, M25 and M4 and have varying access to London Underground stations (Zones 4-6) and several mainline stations.
- 3.45 In the early 1990s The M4 Corridor was a 'hot bed' for high-tech companies looking to expand into the UK. This mainly comprised Japanese and American firms who favoured the area due to its proximity to both Heathrow and central London. This, alongside favourable construction costs and the availability of land, created an attractive environment to support new large-scale HQ-style office development around Heathrow and the wider Uxbridge area.
- 3.46 This lasted until the mid-2000s when Hillingdon started to lose out to other attractive and well-connected parts of London. This shift has continued to the present day and Hillingdon still suffers from above-average office vacancy rates, particularly in Uxbridge and Stockley Park. Over the last few years new flexible offers have supported occupancy, but ultimately the demand for larger floorplate offices has slowed down significantly particularly following the COVID-19 pandemic. Notable moves in recent years include: GlaxoSmith Kline relocated all their staff from their Stockley Park base to the firm's HQ in Brentford in 2020; PwC consolidated teams in their Uxbridge and St Albans offices to a new base in Watford in 2021; and, Pladis (formerly United Biscuits) have moved to a new HQ in Chiswick Park in 2021.
- 3.47 The arrival of the Elizabeth Line has created further challenges for Hillingdon's office market – it has created greater competition as it has made 'trendier' central London locations more accessible and has opened other outer London locations to occupiers. This, in recent years, has underlined the importance of wider town centre offerings and amenities in attracting office occupiers. This is a particular challenge for the 'town centre submarket' as Uxbridge Town Centre is in need of regeneration and rejuvenation to meet changing occupier expectations.
- 3.48 Our agents believe that the 'out-of-town' office market will remain important as Heathrow continues to be one of the world's busiest international airports. The airport's presence has attracted a range of airline related firms alongside occupiers from the Technology, Media, Telecommunications, Production and Professional Services sectors and this is likely to continue moving forward. Both the Life Sciences and Creative industries also have some presence in Hillingdon and are expected to continue driving demand for office floorspace – but on a smaller scale to that of the aviation activity.

Hillingdon's Office Market Trends

Table 9: Office, All Properties

	Current Rents (£psf)	Rental Growth (10 years)	Current Vacancy* (2023)
Hillingdon	£29.67	26%	15%
Ealing	£28.91	29%	6%
Harrow	£25.19	37%	3%
Hounslow	£33.17	26%	8%
Slough	£25.14	27%	9%
Spelthorne	£27.16	25%	6%
Three Rivers	£21.01	30%	5%
West London Alliance	£32.71	29%	9%

Source: Costar, 2023 * This relates to total floorspace vacancy across Hillingdon.

Office Rents

- 3.49 Hillingdon's average office rents are **c.£30** psf which is higher than all its neighbours bar Hounslow which has an average of c.£33 psf. While this in part links to the size and quality of the units let, it signals that demand persists for office properties in the borough.
- 3.50 Hillingdon has, however, seen slightly lower levels of rental growth over the last ten years versus many of its neighbours which may indicate a dampening of demand over time. Across the comparator areas, Hillingdon, Hounslow, Ealing and the West London Alliance as a whole saw average rents rise rapidly from 2013 to a peak in 2016 before falling slightly and flatlining to 2023 (see Figure 15).
- 3.51 Spelthorne, Slough and Three Rivers, in contrast, have seen a gentle but longer-term rise with current rents ranging from £24 to £27 psf. Harrow is the outlier as office rents have seen significant growth from 2013 to 2023 here - the trend line in Figure 15 shows that average rents increased rapidly from 2013 to 2019, experienced a small dip across the COVID-19 period (2020-2021), and saw an upward trajectory moving into 2023.
- 3.52 Figure 16 sets out a visual representation of the current rents achieved across Hillingdon. As shown, the highest rents are achieved in the 'town centre submarket' and 'out-out-town submarket' - i.e. around Hayes, Heathrow and Uxbridge, with lower rents in the north of the borough and along the Uxbridge Road. Higher rents correlate with the borough's more established office locations and where newer build and more modern stock is located.

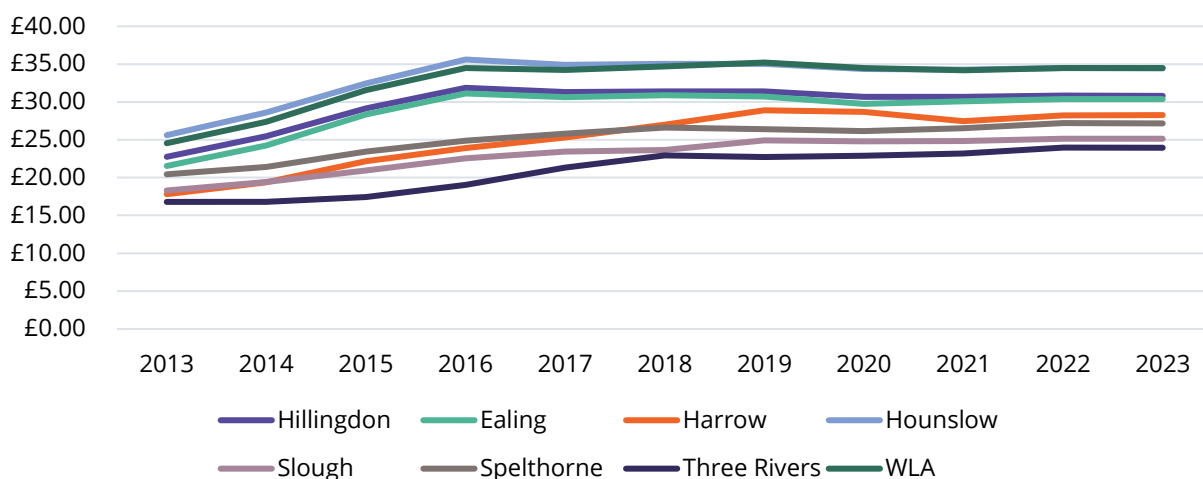


Figure 15: Achieved Rent Office Space, Hillingdon, and Comparator Locations
Source: Costar, 2023

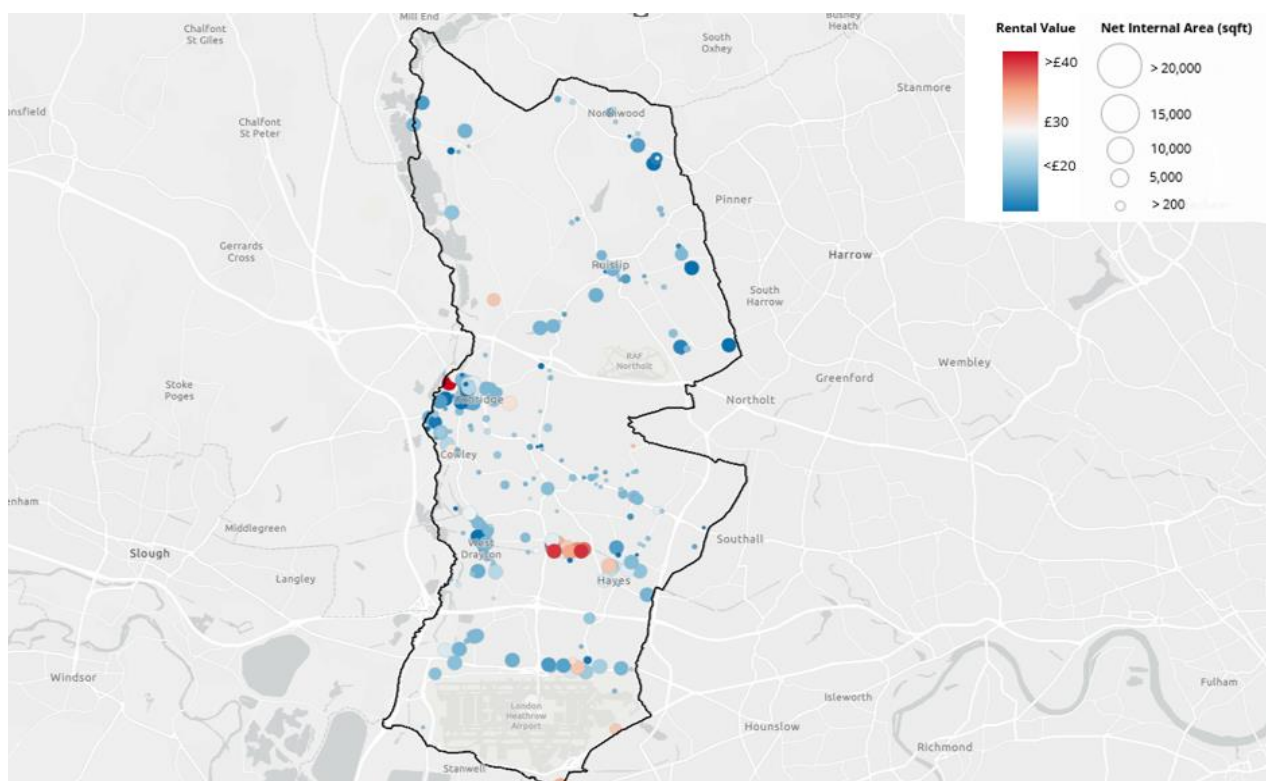


Figure 16: Office Rents across Hillingdon (£psf)

Source: Costar, 2023

Note: The size of each circle indicates the total office floorspace (NIA) by postcode (each dot represents a postcode). The colour key breaks down the rent psf for each office postcode - red showing more expensive rents and blue showing lower cost rents.

Office Vacancy Rates

3.53 Hillingdon’s office vacancy rates are significantly higher than all its neighbours with headline unadjusted figures sitting at **c.15%** - this is also much higher than the West London Alliance average of c.9%. This signals that there may be a need to re-consider existing provision to ensure it better meets the need of existing and future occupiers.

Table 10: Office, Unadjusted Vacancy Rates, 2013-2023

Period	Hillingdon	Ealing	Harrow	Hounslow	Slough	Spelthorne	Three Rivers	WLA
2023	15%	6%	3%	8%	9%	6%	5%	9%
2022	15%	6%	3%	8%	9%	6%	5%	9%
2021	14%	3%	2%	7%	10%	6%	5%	8%
2020	13%	4%	2%	5%	9%	4%	3%	7%
2019	11%	2%	1%	4%	10%	4%	3%	6%
2018	10%	3%	1%	7%	14%	5%	2%	6%
2017	11%	6%	2%	7%	15%	6%	4%	8%
2016	12%	4%	3%	7%	13%	6%	5%	8%
2015	12%	3%	4%	7%	13%	8%	5%	7%
2014	12%	4%	5%	4%	14%	11%	5%	5%
2013	10%	8%	7%	6%	10%	8%	9%	7%

Source: Costar, 2023 Note: This relates to total floorspace vacancy across Hillingdon.

3.54 In line with dampening rental growth, these vacancy rates have risen over time with an increase of five percentage points over the last decade (see Table 10). The only other neighbouring borough that has seen

vacancy rates as high as Hillingdon's is Slough, but these have slowly fallen to c9% in 2023. While this is still relatively high, Hillingdon's demand is weakening and Slough's occupancy is increasing – this could link to the delivery of new office supply or the removal of older supply from the market in Slough. Hounslow's vacancy rates have similarly worsened over the 10-year period but remain significantly below Hillingdon's year-on-year average at 8%.

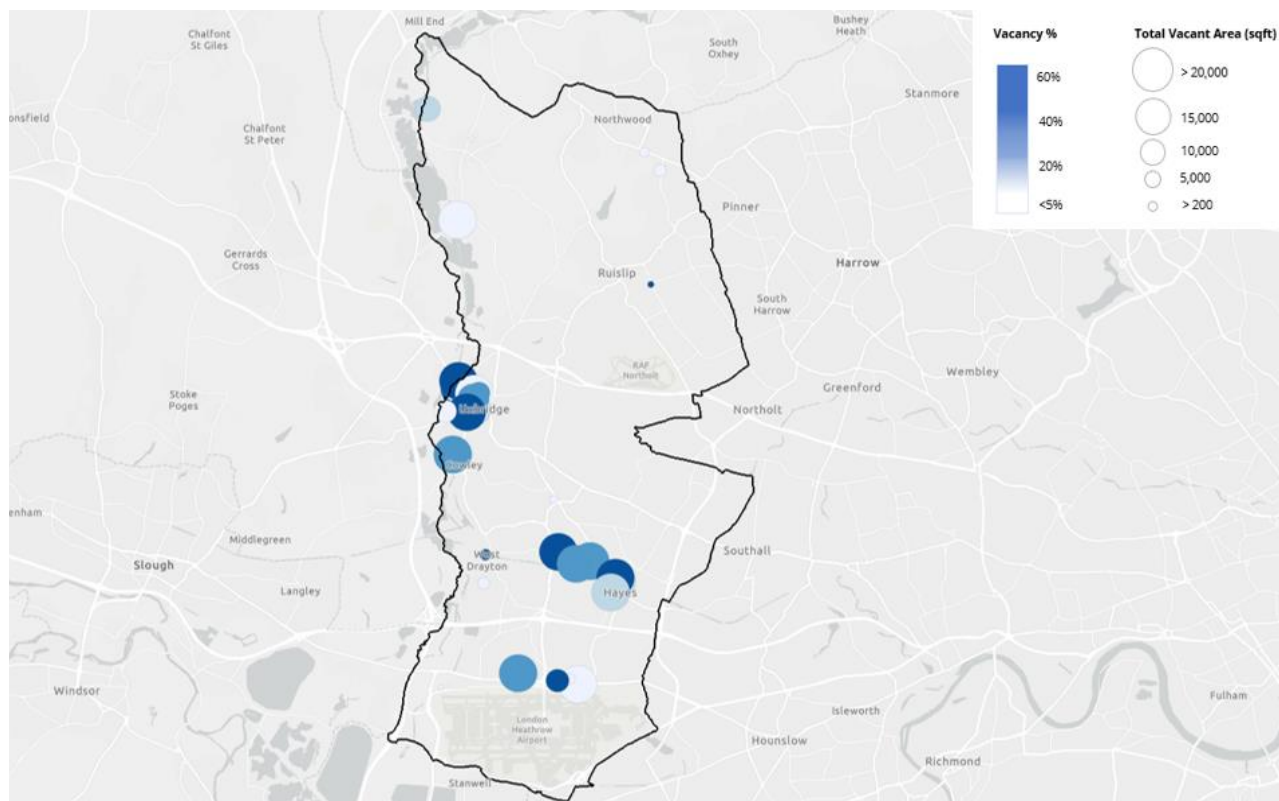


Figure 17: Vacancy Office Map Hillingdon (Unadjusted Figures)

Source: Costar, 2023

Note: The size of each point indicates the total amount of vacant office floorspace (sqft), by postcode (each dot represents a postcode). The colour key shows the percentage of vacant floorspace within each cluster.

3.55 The highest concentration of vacant offices in Hillingdon is in and around Uxbridge town centre as shown in Figure 17. The remaining vacant units are distributed more diffusely across the borough with pockets around Hayes, Stockley Park, West Drayton, Heathrow and Ruislip.

Focus On: Stockley Park

Stockley Park is the largest out of town office location in Hillingdon - it has over 1.7 million sqft of office floorspace and 22 office buildings across the site. While it was once considered a premier out of town business park its 'health' has changed over the past five years characterised by a gradual increase in vacancy. This trend has been accelerated by the rise of hybrid working following COVID-19 with headline unadjusted vacancy rates now sitting at 40% of total floorspace. There are a few important trends that link to this:

- High Rents: The market rent is relatively high across Stockley Park as shown in Figure 16 (£36.10 psf), compared to the wider Hillingdon office market (£30.71).
- Ageing Stock: On average, the office stock was built around 1995 with several renovations taking place in 2015-2016 (6 units renovated). The most recent office renovation came in 2021 but other buildings have not yet been upgraded despite higher demand for Grade A office space.
- Changing Demand: More recent changes have seen office occupiers moving out of Stockley Park with industrial occupiers moving in – reflecting a broader shift in demand at both national and regional levels. Iron Bridge Road, for example, saw the expansion of Prologis Park with two new industrial units built in

2016. Further expansion (Phase II) of the site is currently taking place with two more industrial units coming forward this year, bringing over 300,000 sqft of additional industrial floorspace.

Office Take-up

- 3.56 In terms of take-up, Hillingdon has seen around **340** office lease deals over the last ten years (see Table 11) – the average size of unit per deal is **c9,000** sq ft which is larger than most other neighbouring boroughs and reflects the nature of local stock. Hounslow's office market, which similar in size, is relatively more dynamic with almost double the number of properties leased over the same time period. Moreover, the average unit let in Hounslow is much smaller at c.6,200 sqft which is likely to reflect the presence of smaller town centre properties.
- 3.57 At a finer grain, take-up figures for units categorised into different size brackets across the ten year period illustrate that demand for office units in Hillingdon tend to be for space below 10,000 sqft - take up has been highest for units between 500 to 2,000 sqft (**101** deals) with equally strong demand for units with floorplates of 2,000 to 5,000 sqft (83 deals). This follows a very similar take-up profile to Ealing.

Table 11: Office, Take-up, 2013-2023

	Total Deals	Total sqft leased	Avg. size of unit (sqft)	Rent £psf
Hillingdon	342	3,074,984	8,991	£23.52
Ealing	384	1,254,898	3,268	£22.32
Harrow	218	424,338	1,947	£23.70
Hounslow	615	3,794,331	6,170	£28.09
Slough	243	2,249,794	9,258	£18.42
Spelthorne	160	709,022	4,431	£22.75
Three Rivers	178	1,212,758	6,813	£18.72
West London Alliance	3,889	20,300,024	5,220	£35.40

Source: Costar, 2023

Table 12: Office, Take-up by Floorspace Bracket, 2013-2023

	< 500 sqft	500 - 2,000 sqft	2,000 - 5,000 sqft	5,000 - 10,000 sqft	10,000 - 15,000 sqft	15,000 - 20,000 sqft	> 20,000 sqft	Total Properties	Total Floorspace leased (sqft)
Hillingdon	22	101	83	68	25	9	34	342	3,074,984
Ealing	105	130	81	46	6	5	11	384	1,254,898
Harrow	43	119	38	13	2	3	0	218	424,338
Hounslow	89	204	157	80	23	16	46	615	3,794,331
Slough	24	65	53	53	14	6	28	243	2,249,794
Spelthorne	26	66	36	17	6	3	6	160	709,022
Three Rivers	12	64	55	23	5	2	17	178	1,212,758
West London Alliance	538	1,520	932	485	141	66	207	3,889	20,300,024

Source: Costar, 2023

3.58 Interestingly, Hillingdon has seen a higher number of units leased the over 20,000 sqft floorspace bracket over the last ten year versus its neighbours (34 deals), which is reflective of businesses taking up headquarter type space within the 'town centre' and 'out-of-town' office submarkets – these occupiers tend to be multi-national businesses such as IMG Studios, General Mills and Mitsubishi Electric. Only Hounslow compares in that size bracket, with a reported 46 deals over the last decade. This is not surprising given the transport connectivity and existing clusters of creative and life science presence within and close to the borough boundaries.

National Industrial Picture

3.59 National demand for industrial space has been resilient throughout the COVID-19 pandemic and beyond, with record levels of take-up in recent years. As set out in Avison Young's latest *Big Box Bulletin* (2023), which focuses on Grade A industrial space over 100,000 sqft, 2022 saw **37.6m** sqft let across the UK. This represents a **+7.1%** increase in take-up versus the five-year average and marks three consecutive years of **30m+** sqft take-up.

3.60 There are four main trends influencing rising demand for industrial stock:

- **On-Shoring:** Linked to both BREXIT and the COVID-19 pandemic many occupiers have increased their stock holding and local contingency capacity to increase resilience in supply chains. Geo-political conditions such as the war in Ukraine, and the Suez Canal obstruction in 2021, have furthered this trend. Many businesses are on-shoring storage activity that has traditionally been undertaken overseas to avoid any disruption resulting from border controls or other socio-political shocks. Commentators also expect to see some reshoring of manufacturing from Europe and the Far East to improve resilience in global supply chains.
- **Automation:** The development of new advanced technology is leading to an increase in automation across many industrial sectors. This is creating demand for industrial units with both greater building heights, particularly those in excess of 20m, and good levels of electrical power. Whilst automation is being increasingly adopted to improve efficiency this is usually in conjunction with a warehouse labour force rather than as a direct replacement.
- **E-Commerce:** The UK already had the highest penetration of online sales in the world before the COVID-19 pandemic, but the various lockdowns accelerated this trend. E-commerce can be split into two main categories, food and non-food retail, and activity in both parts of the industry increased significantly during and after the pandemic. This rising consumer demand led to an immediate reaction across the e-commerce sector, focused on the largest multi-million sqft buildings to last mile logistics facilities below 100,000 sqft.
- **Technology:** Many industrial sectors are going through a technological revolution. This is particularly the case for the automotive industry which is seeing a transfer from the internal combustion engine to electric motors which requires major investment by the industry in new technology and Gigafactories. Similarly, the rising role of digital and data in the day-to-day lives of people and businesses is creating demand for more data storage driving the creation of energy-intensive data centres across the country.

3.61 In London a severe lack of general industrial and light industrial stock of all sizes and typologies has limited market activity. Since 2001 industrial vacancy rates have dropped from **16%** to around **4%** today – this illustrates that stock is well-used and unlikely to be meeting demand from businesses²⁴. This is emphasised in Centre for London's *Making Space: Accommodating London's Industrial Future* report which sets out:

"The 2017 London Industrial Land Demand Study showed that in several London subregions, including central London, there were virtually no vacant industrial buildings for businesses to move into... Such low vacancy rates mean that industrial businesses are highly unlikely to find accommodation that meets their needs at a price they can afford. Anecdotal evidence from our interviews confirmed that industrial businesses have great difficulty in finding suitable space to operate from in London".

²⁴ Centre for London, *Making Space: Accommodating London's Industrial Future* (2022).

- 3.62 This constrained supply picture has put immense upwards pressures on land values, with some sites in London commanding up to **£10m** per acre. Rents also increased significantly during 2022, rising by an average of **+13.4%** across the country as a whole²⁵.
- 3.63 While new industrial buildings are being built in London there are relatively few of them, and they tend to be designed for high-value and high-growth industries such as logistics or data centres. This is because demand is particularly high from businesses in these sectors which are able to afford higher rents than some other more traditional industrial sectors. This is highlighted in PwC's Emerging Trends in Real Estate Report (2021), which predicts that demand is expected to remain strong from logistics, life science and data centre occupiers moving forward, and they present clear opportunities for investors.
- 3.64 While the provision of such space is important for London's economy, more traditional industrial activities that require both industrial and light industrial space have reported that the demand from higher-value occupiers has further inflated industrial rents making it more difficult for them to access the space they need at a price they can afford. This is being exacerbated by the loss of supply across both Inner and Outer London in recent decades.
- 3.65 These trends are captured in the GLA's new *Industrial Land Supply Audit (2023)* - as set out in the policy context chapter, London's land supply has shrunk significantly over the last 20 years with the most significant loss over the past five years. The planning pipeline signifies that this trend is set to persist at an unprecedented rate in coming years. Of the stock that does exist, there is also a significant challenge around obsolescence particularly in the context of Minimum Energy Efficiency Standard (MEES) regulations.

Hillingdon's Industrial Picture

- 3.66 Heathrow and its supply chain drive significant demand for warehousing in Hillingdon. Demand around the airport has historically been dominated by Transport & Storage businesses carrying out functions for airlines and logistics companies that receive air freight. More recently, e-commerce retailers have increasingly started to feature in the market to service their 'last-mile' functions with the likes of Amazon and Ocado occupying space locally.
- 3.67 Whilst the south of the borough has seen speculative development following the Great Recession, large units, particularly those over 100,000 sqft, remain in relatively short supply given planning and development constraints around Heathrow. Agents anticipate that future demand will mainly be for medium to larger units that are less than 100,000 sqft – they expect few units upwards of 200,000 sqft to be required.
- 3.68 While there is little manufacturing activity overall, food manufacturers have a strong presence in the area to provide catering for airlines. Alpha LSG Sky Chef and Gate Gourmet remain major employers despite cuts to staffing as a result of the impact of COVID-19 on the aviation industry. These businesses are expected to underpin some demand moving forward.
- 3.69 Industrial space is in high demand from data centre providers across the borough. The shift to cloud-computing, streaming and requirements for servers within London has created a significant need for data centres along the M4 corridor – particularly in Hillingdon and Slough. Data centres tend to be delivered in clusters (within a 15km radius of one another) to enable a 'parent and child' model – essentially a back-up system across data centres. This is an important consideration given the lack of industrial supply across Hillingdon.
- 3.70 This drive for data centres is already starting to have an adverse effect on Hillingdon's more traditional industrial occupiers as it is driving rental and land value increases. This is significant as it is extremely challenging to 'cool down' a market in unless significant additional supply is introduced.

²⁵ Avison Young, Big Box Bulletin (2023).

Hillingdon Industrial Market Trends

Table 13: Industrial, All Properties

	Current Rents (Epsf)	Rental Growth (10 years)	Current Vacancy Rate
Hillingdon	£19.45	51%	5%
Ealing	£20.07	51%	5%
Harrow	£17.61	50%	12%
Hounslow	£20.03	51%	4%
Slough	£16.82	39%	3%
Spelthorne	£17.14	46%	0%
Three Rivers	£15.27	43%	2%
West London Alliance	£19.80	51%	5%

Source: Costar, 2023

Industrial Rents

- 3.71 Hillingdon’s average industrial rents are relatively high at **c.£19.50** psf but are slightly below both Hounslow and Ealing’s average rents which are c.£20 psf respectively. This potentially signals a slight preference for units in those locations, though all three boroughs have experienced similar levels of rental growth across the last ten years (see Table 12) which suggests that industrial demand is heating up in these locations reflecting national and London-wide trends.
- 3.72 As Figure 18 shows Hillingdon’s industrial rents have strengthened progressively over the last decade in line with Ealing, Hounslow and West London as a whole. Across all comparator areas, there has been a steady incline in rents since 2013 but Harrow, Slough and Spelthorne’s rents sit slightly lower at around £18 psf. Should Hillingdon’s rents continue to rise, this may create affordability issues for some occupiers who may be forced to take alternative accommodation in more affordable neighbouring locations.
- 3.73 As shown in Figure 19, most of Hillingdon’s lettings have occurred around Hayes, West Drayton, Heathrow and Uxbridge. Some of the higher achieved rents have been in the south of the borough near Heathrow – this is not surprising given the cargo and distribution activity here cannot be located elsewhere. There is, however, little diversity in the rents across the borough with units predominantly leasing at £10-£20 psf.

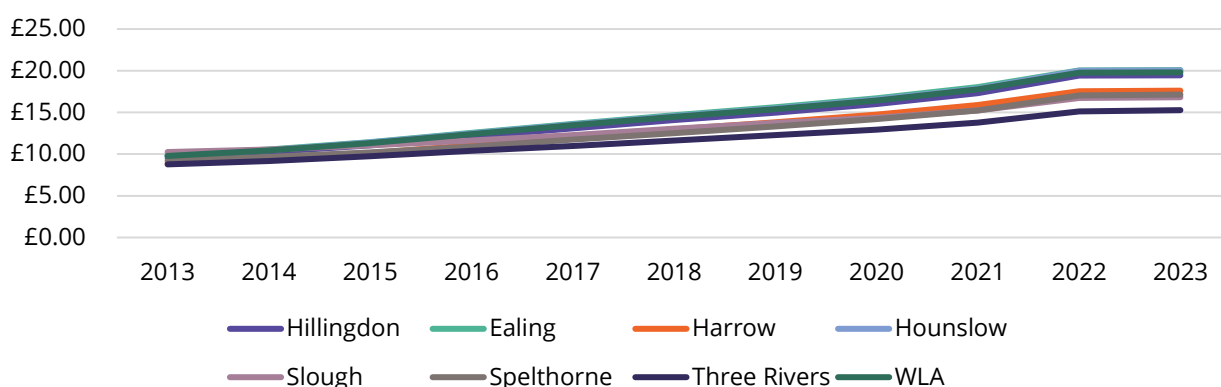


Figure 18: Achieved Rent Industrial Space, Hillingdon, and Comparator Locations

Source: Costar, 2023

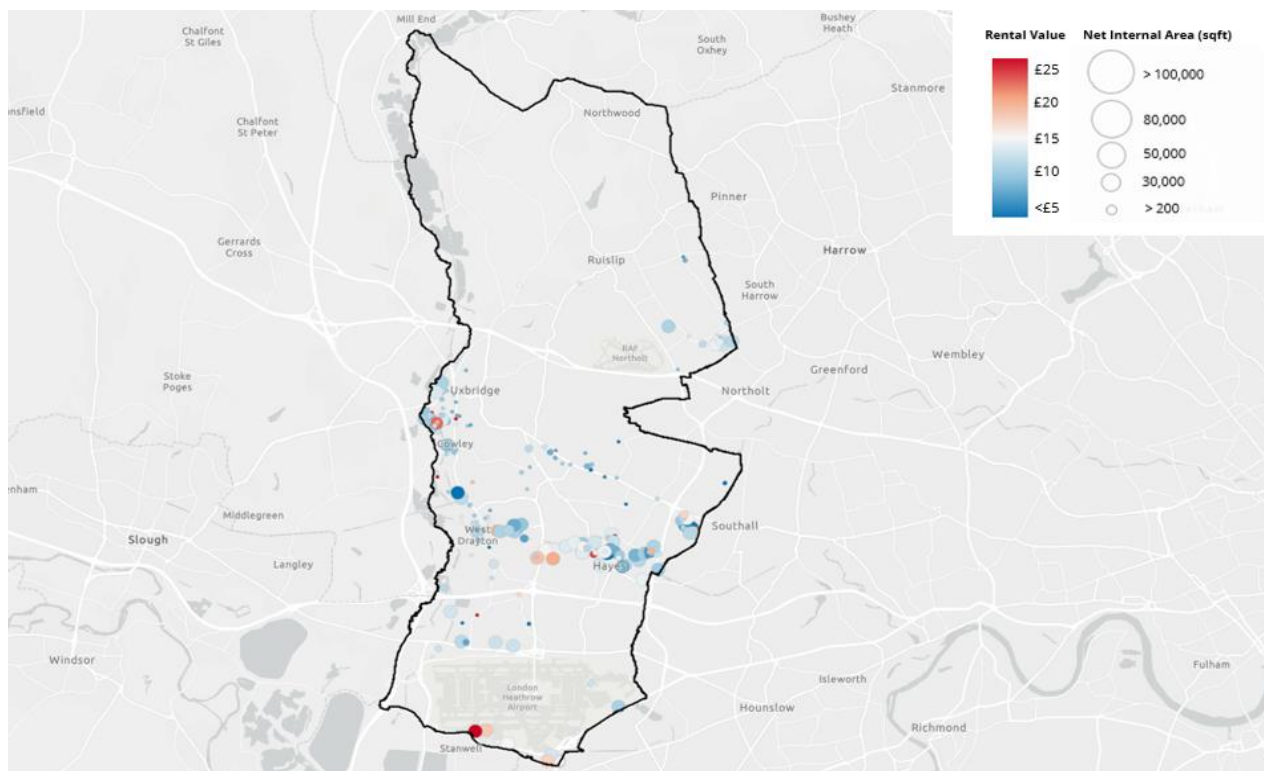


Figure 19: Industrial Rents across Hillingdon (£psf)
 Source: Costar, 2023
 Note: The size of each circle indicates the total office floorspace (NIA) by postcode (each dot represents a postcode). The colour key breaks down the rent psf for each office postcode - red showing more expensive rents and blue showing lower cost rents.

Industrial Vacancy Rates

3.74 Hillingdon’s headline industrial vacancy rates are low at **5%** which is below the GLA’s recommended 8% benchmark – vacancy rates lower than this mean that businesses looking to expand or locate in an area are often unable to limiting the economic growth and success of an area.

Table 14: Industrial, Headline Unadjusted Vacancy Rates, 2013-2023

Period	Hillingdon	Ealing	Harrow	Hounslow	Slough	Spelthorne	Three Rivers	WLA
2023	5%	5%	12%	4%	3%	0%	2%	5%
2022	5%	5%	12%	4%	3%	0%	1%	4%
2021	4%	3%	1%	1%	2%	4%	2%	3%
2020	4%	4%	2%	4%	2%	6%	1%	3%
2019	2%	3%	1%	3%	3%	2%	3%	2%
2018	5%	4%	1%	4%	2%	2%	1%	3%
2017	8%	5%	1%	6%	3%	3%	3%	5%
2016	8%	3%	4%	6%	4%	1%	1%	4%
2015	7%	3%	3%	5%	5%	4%	1%	4%
2014	8%	5%	6%	8%	6%	7%	3%	6%
2013	6%	8%	8%	8%	5%	10%	4%	6%

Source: Costar, 2023

3.75 This is a common theme across the borough’s neighbours, except in Harrow which has recently experienced a significant and anomalous increase in vacancy rates. We expect that Hillingdon’s vacancy rates are, in

reality, likely to be even lower than this as a significant proportion of existing vacant space can be attributed to four industrial properties currently under construction which total **c.1.6mn** sq ft of space.

3.76 The four properties under construction are set out in Table 15 below. Of note, there are two properties within the new Prologis Park development which accounts for c.339,600 sq ft whilst the new data centre development (Union Park) will be almost double this size, c.675,000 sq ft. Other than this a small warehouse is being delivered in Riverside way, extending c.50,500 sq ft.

Table 15: Industrial, Under Construction

Property Name	Property Type	NIA (sq ft)
Phase II Prologis Park West London	Industrial	195,719
Phase II Prologis Park West London	Industrial	143,849
Union Park Data Centre	Light industrial	675,000
Riverside Way	Industrial	50,504

Source: Costar, 2023

3.77 As the map below shows there are no strong clusters of industrial vacancy across the borough, with almost none in central and northern areas. A small number of vacant units can be found around Hayes and West Drayton.

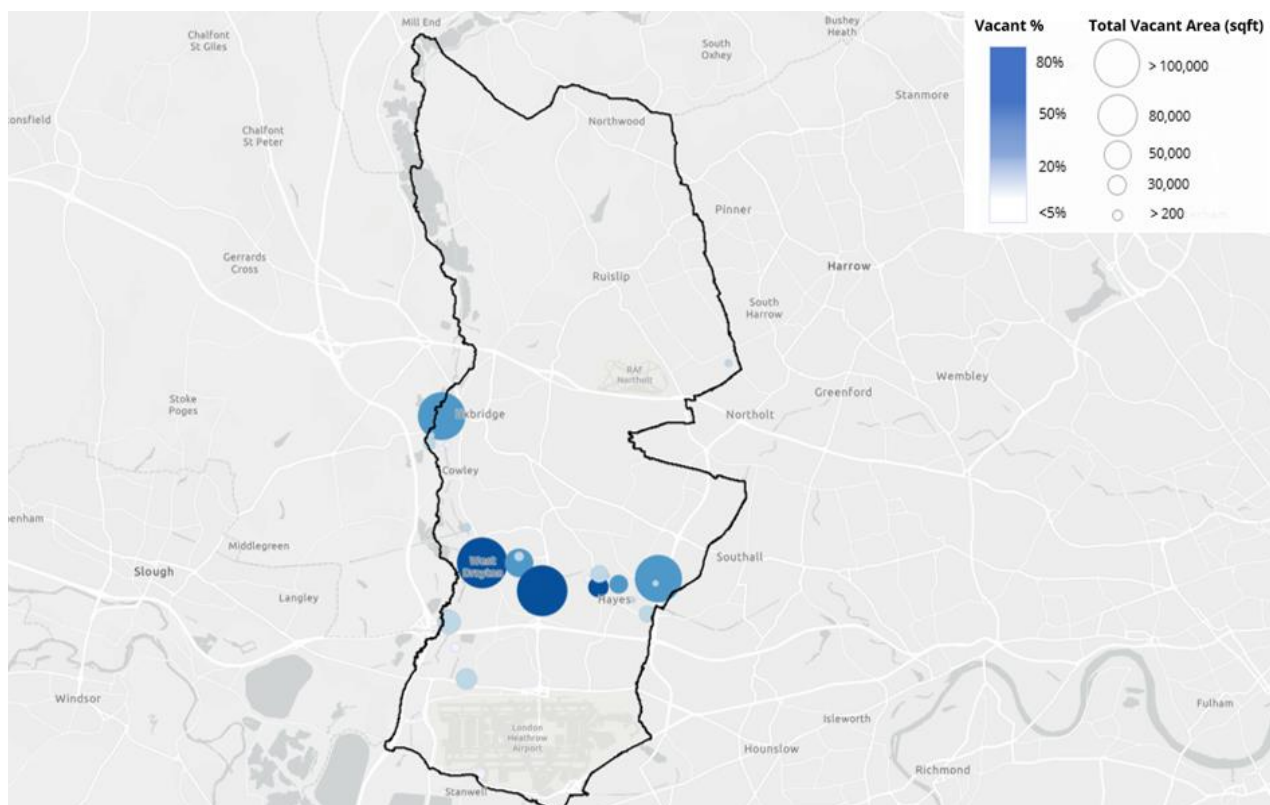


Figure 20: Industrial Vacancy across Hillingdon (Headline Unadjusted)

Source: Costar, 2023

Note: The size of each point indicates the total amount of vacant industrial floorspace (sqft), by postcode (each dot represents a postcode). The colour key shows the percentage of vacant floorspace within each cluster.

Industrial Take-up

3.78 As shown in Table 16, there has been far less industrial take-up over the last ten years in Hillingdon (c.500 deals) versus Hounslow (c.1,028 deals) and Ealing (c. 828) indicating that the borough has a less dynamic

market. Average unit sizes leased in Hillingdon are, however, comparatively larger at **c.14,600** sqft against 13,500 and 10,600 sq ft in Ealing and Hounslow respectively.

Table 16: Industrial, Take-up, 2013-2023

	Total Deals	Total sqft leased	Avg. size of unit (sqft)	Rent £psf
Hillingdon	500	7,291,019	14,582	£11.97
Ealing	828	11,186,752	13,511	£13.27
Harrow	98	507,605	5,180	£11.27
Hounslow	1,087	11,495,084	10,575	£12.11
Slough	625	8,629,897	13,808	£12.29
Spelthorne	137	2,027,085	14,796	£10.82
Three Rivers	98	439,815	4,488	£11.58
West London Alliance	3,853	45,214,661	11,735	£11.58

Source: Costar, 2023

3.79 Drilling down into leasing activity, Hillingdon's industrial take-up has primarily been for smaller units of between 2,000 to 10,00 sq ft over the last ten years – there have been **124** deals for units within this size bracket over this period. Whilst this may be the case, there has been strong take up across all size categories– including a higher number of deals for larger units over 100,000 sq ft category (**c.9** deals) than most of the borough's neighbours.

Table 17: Industrial, Take-up by floorspace bracket, 2013-2023

	< 2,000 sqft	2,000 - 5,000 sqft	5,000 - 10,000 sqft	10,000 - 20,000 sqft	20,000 - 50,000 sqft	50,000 - 100,000 sqft	> 100,000 sqft	Total Properties	Total Floorspace leased (sqft)
Hillingdon	84	124	108	74	81	20	9	500	7,291,019
Ealing	81	233	232	148	96	29	9	828	11,186,752
Harrow	30	29	30	6	3	0	0	98	507,605
Hounslow	149	317	281	202	111	23	4	1,087	11,495,084
Slough	148	163	139	82	64	15	14	625	8,629,897
Spelthorne	29	39	34	10	17	6	2	137	2,027,085
Three Rivers	24	57	10	3	4	0	0	98	439,815
West London Alliance	672	1,113	958	574	398	97	41	3,853	45,214,661

Source: Costar, 2023

4. Need Context: Determining Future Employment Floorspace Need

Chapter Summary

This chapter determines Hillingdon's future economic development needs through the analysis of different scenarios and sensitivities informed by the demand context set out in the preceding chapter. Four scenarios are considered which focus on:

1. Labour Demand: This draws on employment projections from Experian and the GLA.
2. Adjusted Labour Demand: This adjusts employment projections from Experian and the GLA based on market signals.
3. Past Development Rates: This projects forward past commercial development rates.
4. Past Take Up Rates: This projects forward past commercial take up rates.

Following analysis of these scenarios, as well as a consideration of the benefits and disbenefits of each, a preferred scenario has been identified which is provided as a recommendation for the minimum employment floorspace to plan for as part of the borough's new *Local Plan (2023-2038)*. As set out later in the chapter this is a variant of the Adjusted Labour Demand scenario which identifies both 'optimistic' and 'conservative' figures (i.e. a range) for future need. It identifies the following floorspace requirements by use class over the plan period – these figures allow for 'best practice' safety margin adjustments.

	Conservative figures without safety margin	Conservative figures with safety margin adjustment	Optimistic figures without safety margin	Optimistic figures with safety margin adjustment
Floorspace (SQM)				
EG(i)/(ii) (office)	+88,732	+95,831	+120,688	+130,343
B2/EG(iii) (general industrial)	+39,423	+42,577	+41,929	+45,283
B8 (warehousing)	+116,145	+125,437	+136,393	+147,304
Total	+244,300	+263,845	+299,010	+322,930

These figures have also been through a sensitivity test using evidence underpinning the *London Plan (2021)* – most notably related to employment densities as explained in more detail later in the chapter. The impact of these changes on the preferred scenario figures is set out in the table below.

	Conservative figures without safety margin	Conservative figures with safety margin adjustment	Optimistic figures without safety margin	Optimistic figures with safety margin adjustment
Floorspace (SQM)				
EG(i)/(ii) (office)	+77,128	+83,298	+97,412	+105,205
B2/EG(iii) (general industrial)	+39,423	+42,577	+41,929	+45,283
B8 (warehousing)	+75,419	+81,453	+88,567	+95,652
Total	+191,970	+207,328	+227,908	+246,141

It is recommended that the revised *Local Plan (2023-2038)* provides for the pre-sensitivity test figures as shown in the first table. While both approaches are robust and appropriate for the context, the employment densities aligned to the national guidance are more realistic based on the nature of commercial space and

economic activity being undertaken across the borough. It is also recommended that LBH reviews this position every five years to ensure that the figures remain appropriate and relevant during the course of the revised *Local Plan (2023-2038)* period.

- 4.1 This chapter identifies future economic growth needs in Hillingdon. In line with the PPG, a series of scenarios are used to do this starting with labour demand forecasts followed by a consideration of 'reasonable alternatives'. The four scenarios considered are²⁶:
- Scenario 1: Labour Demand: This scenario draws on employment projections from Experian and the GLA.
 - Scenario 2: Adjusted Labour Demand: The scenario adjusts employment projections from Experian and the GLA based on market signals.
 - Scenario 3: Past Development Rates: This scenario projects forward past commercial development rates using data from Authority Monitoring Reports (AMR) and the Planning London Datahub.
 - Scenario 4: Past Take Up Rates: This scenario projects forward past commercial take up rates using data from CoStar.
- 4.2 The outputs from these scenarios are used to identify a preferred forecast to form the basis of future planning. It is important to note that each scenario has limitations and careful thought has been put into how appropriate each is to local circumstances.

Scenario 1: Labour Demand

- 4.3 The first scenario, which focuses on labour demand, uses employment projections to determine future employment space requirements. While there are inherent limitations of using projections of this nature, particularly in the context of ongoing changes to the economy, they are widely recognised as valuable to indicate the broad scale and direction of future economic growth – the PPG also advocates the use of such projections as a starting point for a study of this nature²⁷.
- 4.4 The first projection draws on Experian's latest *Local Market Forecasts* (April 2023). These provide overall employment growth figures for Hillingdon which factor in demographic trends and projections that are consistent with those used by the Department for Levelling Up, Housing and Communities (DLUHC). They also provide employment projections for 38 economic 'categories' which align to Standard Industry Classification (SIC) codes, allowing figures to be translated directly into employment floorspace and land requirements for specific use classes.
- 4.5 The second projection, which represents a more conservative 'lower growth' perspective, draws on the GLA's borough-level *Employment Projections (2022)* as set out in their *London Long Term Labour Market Projections (2022)*²⁸. As stated in the accompanying report "...projections are based on historic productivity trends and assumptions about the future path of economic output... [B]orough-level projections are also informed by plans for employment site capacity".
- 4.6 While the GLA's projections provide overall employment growth figures for Hillingdon they do not, however, break this down by sector which means they cannot be directly translated into employment floorspace and land requirements. To overcome this total employment growth figures have been translated into the 38 categories used by Experian based on the share of employment growth within each sector for each year of the Experian forecast.
- 4.7 For both sets of projections the detailed sector breakdown is used as the basis for aggregating groups of activity into land use types (i.e. EG(i)/(ii) office, B2/EG(iii) general industrial and B8 distribution). Employment growth figures for each use type are then used to determine additional employment floorspace requirements by use type based on employment density assumptions from the latest Homes and

²⁶ This study does not include a labour supply scenario as the complexity of London's labour market makes it difficult to develop a robust projection of the borough's future workforce, particularly as the latest Census does not include evidence on commuting flows.

²⁷ Paragraph 027.

²⁸ Greater London Authority, *London Long Term Labour Market Projections*, 2022.

Communities Agency (HCA) *Employment Density Guide* (2015) and our understanding of the nature of current and likely future economic activity in the borough:

- EG(i)/(ii) (office) – 10 sqm per employee (NIA). This reflects the mix of professional, scientific, technical and administration activities that underpin Hillingdon’s current economy and are expected to drive future growth.
- B2/EG(iii) (general industrial) – 36 sqm per employee (GIA). This reflects the on-going demand for light industrial space and provides a reasonable mid-point estimate for future workshop and studio requirements.
- B8 (warehousing) – 77 sqm per employee (GEA). This reflects the borough’s future and current role as a location for storage, distribution and final mile activities associated with Heathrow and its supply chain.

4.8 Sensitivity testing is undertaken later in this chapter to consider the impact of changing these employment densities to those set out in the evidence base underpinning the *London Plan* (2021).

Experian Labour Demand Scenario

4.9 As shown in Figure 21, Experian forecast that there will be a net increase of **+23,800 FTE jobs** in Hillingdon between 2022 and 2038 which translates to a **+14%** change versus the baseline. An uneven level of employment growth is expected across the Experian categories – those that are expected to see the greatest growth include:

- Professional Services (+6,200 FTE jobs).
- Administration and Support Services (+5,800 FTE jobs).
- Land Transport, Storage and Post (+2,700 FTE jobs).
- Accommodation and Food Services (+2,200 FTE jobs).
- Health (+1,300 FTE jobs).
- Computing and Information Services (+1,000 FTE jobs).
- Education (+800 FTE jobs).

4.10 These forecasts underline the importance of private sector activity to Hillingdon’s current and future economy reflecting its attractiveness to both office and industrial occupiers – strategic advantages include the presence of Heathrow, the proximity of the M25, the borough’s public transport connectivity into Central London and the breadth and depth of the labour pool.

4.11 Despite a decline in some important private sector industries in recent years, these forecasts indicate that some office (e.g. Professional Services and Computing and Information Services) and industrial (e.g. Land Transport, Storage and Post and Wholesale) sectors are expected to see a strong recovery over the new *Local Plan* period. While office-based activity is expected to be the main driver of future employment growth, there are a number of important industrial sectors that will also need to be accommodated (e.g. Land Transport, Storage and Post and Wholesale).

4.12 These forecasts also underline the impact of the expansion of the borough’s population in driving economic growth, with sectors that are required to serve a larger resident population among growth areas (i.e. Health, Education and Residential Care). The expected growth in Construction activity partly reflects the same drivers linked to the large building programme occurring across the borough.

4.13 In contrast, the sectors showing the greatest projected decline over the period include Extraction and Mining (-100 FTE jobs), Printing and Recorded Media (-100 FTE jobs), Computer and Electronic Products (-100 FTE jobs) and Media Activities (-100 FTE jobs) reflecting their declining role in the local economy in recent decades. A large number of sectors are not expected to see any employment change including a number of manufacturing activities, as well as Insurance, Pensions and Telecoms – these have not historically been important or prominent industries in Hillingdon.

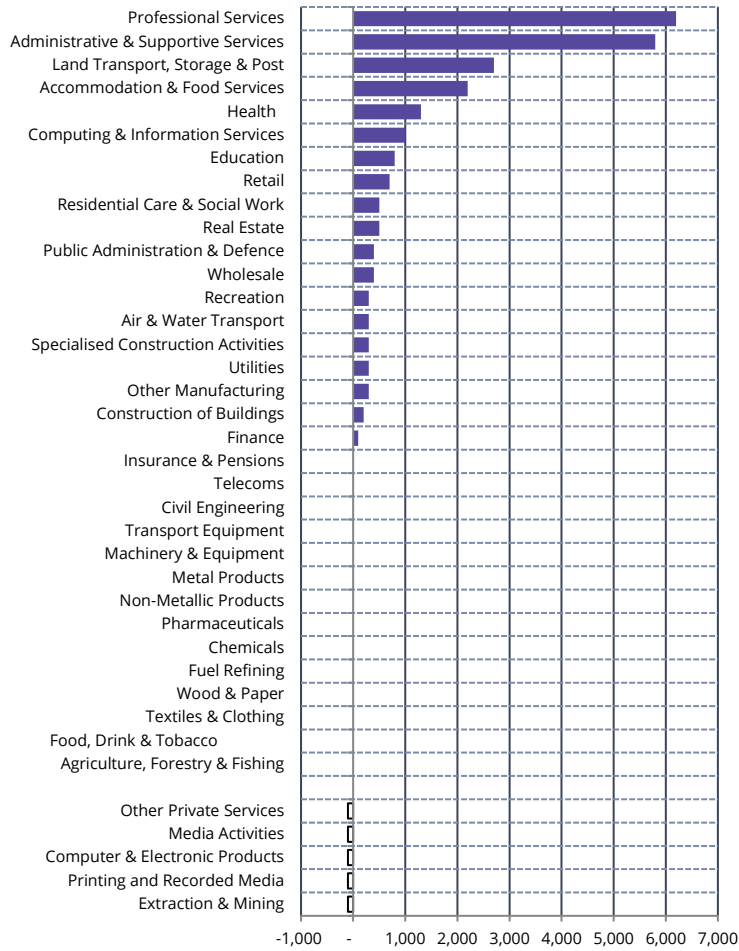


Figure 21 Experian Employment Projections by Sector (2022-2038)
 Source: Experian and Avison Young, 2023

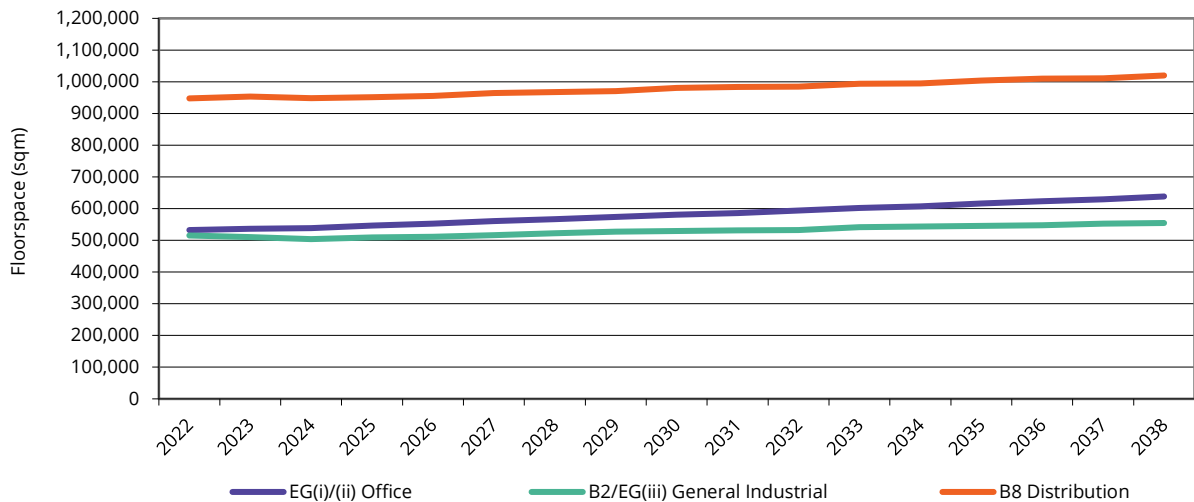


Figure 22: Experian Base Forecast for Office (EG(i)/(ii)), General Industrial (B2/EG(iii)) or Distribution (B8) Floorspace (Old 'B' Class).
 Source: Experian and Avison Young, 2023

4.14 Translating this data into broad use categories it is clear that around **53%** of employment growth will be in sectors that require office (EG(i)/(ii)), general industrial (B2/EG(iii)) or distribution (B8) floorspace – these are traditionally grouped under the banner of ‘B class space’ based on the old Use Class Order. This translates to **+12,621** FTE jobs distributed across the following space types:

- EG(i)/(ii) (office) – **+10,584** FTE jobs.
- B2/EG(iii) (general industrial) – **+1,098** FTE jobs.
- B8 (warehousing) – **+939** FTE jobs.

4.15 Using the Employment Density assumptions previously discussed this results in a need to provide an additional **217,627 sqm** of 'B Class space' to 2038, driven by a significant requirement for additional 'office' space (see Figure 22):

- EG(i)/(ii) (office) – **+105,843** sqm.
- B2/EG(iii) (general industrial) – **+39,517** sqm.
- B8 (warehousing) – **+72,267** sqm.

GLA Labour Demand Scenario

4.16 In contrast to Experian, the 'lower growth' GLA forecasts indicate that there will be a net increase of **+16,082** FTE jobs in Hillingdon between 2022 and 2038 which translates to a **+8%** change against the baseline – this is not expected to occur in a linear fashion with employment expected to rise more rapidly at the beginning of the period before falling towards the end.

4.17 Following the translation of these figures to different sectors using proportions from Experian, it is evident that around **9,136** of these FTE jobs will be in sectors that require office (EG(i)/(ii)), general industrial (B2/EG(iii)) or distribution (B8) floorspace – this equates to:

- EG(i)/(ii) (office) – **+8,462** FTE jobs.
- B2/EG(iii) (general industrial) – **+366** FTE jobs.
- B8 (warehousing) – **+308** FTE jobs.

When considered against Employment Density assumptions this equates to a need to provide an additional **121,535** sqm of 'B Class space' to 2038 (see Figure 23) broken down as follows:

- EG(i)/(ii) (office) – **+84,622** sqm.
- B2/EG(iii) (general industrial) – **+13,166** sqm.
- B8 (warehousing) – **+23,747** sqm.

4.18 As set out in Table 18 below the GLA's projections anticipate lower overall employment growth than Experian, as well as damper expectations for general industrial and distribution space. This might be explained by the following reasons:

- The GLA's more muted forecasting of employment growth over the long time impacts the ability of the forecast to show a 'recovery' of sectors that have seen significant short-term contraction as a result of the COVID-19 pandemic whereas the Experian prediction of larger longer term growth allows these early losses to be recovered and continue to deliver additional jobs.
- The GLA forecast is constraining its assessment of economic potential by 'baking in' the implications of historic policy decisions, most notably planned losses of employment land, without necessarily including any 'allowance' for growth being delivered in other ways or the market adjusting and meeting needs through intensification on sites not yet released or even bringing forward sites expected to be lost as enhanced employment provision.

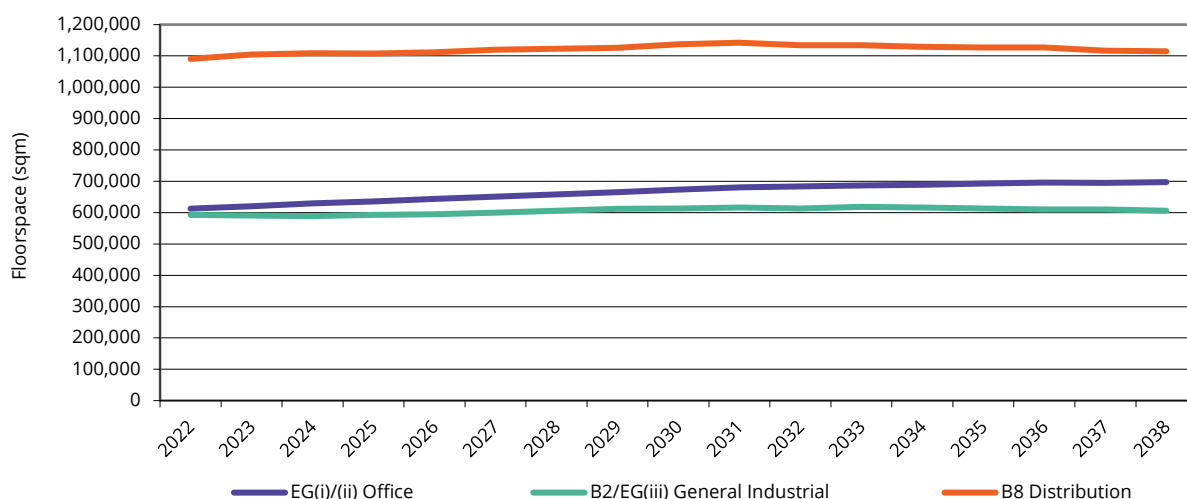


Figure 23: GLA Base Forecast for Office (EG(i)/(ii)), General Industrial (B2/EG(iii)) or Distribution (B8) Floorspace (Old 'B' Class).

Source: GLA Economics and Avison Young, 2023

Table 18: Base Labour Demand Floorspace Projection Results (2022-2038)

	Constant		Experian		GLA	
	Employment Density	Plot Ratio	Jobs (FTE)	Floorspace (sqm)	Jobs (FTE)	Floorspace (sqm)
EG(i)/(ii) (office)	10	2	+10,584	+105,843	+8,462	+84,622
B2/EG(iii) (general industrial)	36	0.4	+1,098	+39,517	+366	+13,166
B8 (warehousing)	77	0.4	+939	+72,267	+308	+23,747
Total	N/A	N/A	+12,621	+217,627	+9,136	+121,535

Source: Experian, GLA Economics, HCA & Avison Young, 2023

Scenario 2: Adjusted Labour Demand

- 4.19 The Experian and GLA labour demand projections provide a useful basis for understanding the broad scale and direction of economic growth in Hillingdon, but as with any nationally derived forecasts do not fully consider the local context and market signals. As highlighted in the preceding chapter, there are many drivers that could impact future demand ranging from the changing nature of office work to the rising importance of logistics space.
- 4.20 Factors that could impact local demand are set out in the table below and their impact on floorspace need is considered drawing on secondary sources. These 'signals' have been applied to the base labour demand projections from Experian and the GLA to estimate the impact they could have on future employment floorspace requirements in Hillingdon.

Table 19 Labour Demand Adjustment Factors

Influencing Factor	Description	Adjustments Made to Labour Demand Forecasts
<p>Changing Nature of Office Work</p>	<p>As set out in the preceding chapter the changing working patterns introduced during the COVID-19 pandemic have had a long-term impact on the nature of office demand. This is because most office-based employees and employers recognise the personal and productivity benefits of remote working, but generally agree that it does not provide the community, collaboration and development opportunities offered by in-person interaction experienced in offices.</p> <p>This has led to a rise in hybrid working as the ‘new norm’ (i.e. a mix of home and in-person working) which has pushed many businesses to look for more flexible commercial space that suits this new working pattern. There are lots of statistics illustrating the increasing role of hybrid working in office workers’ lives:</p> <ul style="list-style-type: none"> • Data from a business survey undertaken by the Chartered Institute of Personnel and Development in June 2022²⁹ shows that more than three quarters of businesses allow hybrid working through either formal or informal arrangements. Around half expect their employees to be in for at least two days or three days per week. • Data from a worker survey undertaken by the ONS in January 2023 shows that over 40% of workers now work at home either all the time or in a hybrid fashion – just under 30% identified themselves specifically as ‘hybrid workers’. Figures were higher in London where 40% of respondents identified as ‘hybrid’ workers³⁰. • An occupier survey undertaken by Colliers International in June 2021 suggests that around 77% of office employers have shifted to a hybrid format compared to 20% pre-pandemic³¹. <p>These shifts are causing occupiers and investors to focus more on wellbeing, collaboration and experience when considering office space rather than a traditional narrower focus on size and location. Agents report that, in general, occupiers are requiring less floorspace <i>in total</i> compared to before the COVID-19 pandemic linked to the shift to hybrid working, but that densities per desk are generally rising due to the increasing requirement for wellbeing, collaboration, socialising and meeting type space within offices.</p> <p>It is unlikely that the Experian and GLA base projections sufficiently take this into account given both anticipate high levels of need for additional office space in Hillingdon. While employment may increase in office-based sectors as suggested, the traditional linear relationship between employee number and the amount of office space required has changed.</p>	<p>Based on ONS data about the proportion of home and hybrid workers ³²it has been assumed that between 60% (conservative) and 70% (optimistic) of employment generated by office-based sectors (EG(i)/(ii)) will translate to floorspace requirements moving forward.</p> <p>Based on changing occupier requirements it has also been assumed that office employment densities will increase slightly and reflect densities traditionally associated with in out-of-town office parks where more facilities have historically been provided. Densities of between 13 (conservative) and 14 sqm (optimistic) per employee (NIA) have been used.</p>
<p>Rising Importance of Logistics</p>	<p>As set out in the preceding chapter national demand for logistics space has increased significantly over the last five years driven by a range of factors including onshoring, automation, e-commerce and technology. This demand has filtered through to London which, when combined with a highly constrained industrial market, has pushed down vacancies and driven up rents across the city. Hillingdon has felt the brunt of these pressures as reflected in industrial vacancy rates falling from 7% in 2015 to 5% in 2022 and rents increasing from £11.05 psf to £19.41 psf over the same period.</p> <p>Hillingdon’s industrial demand is primarily driven by Heathrow which is the UK’s largest airport and a significant attractor of inward investment. The main link between the airport and employment land is through logistics operations – it is the largest port</p>	<p>Based on projections from the British Property Federation, and our understanding of Hillingdon’s locational advantages, it has been assumed that Hillingdon’s logistics sector (classified by Experian as ‘Land Transport, Storage and Post’) will grow ahead of trends expected at the national level</p>

²⁹ CIPS, Hybrid Working Survey, 2022

³⁰ ONS, Characteristics of Homeworkers, 2023

³¹ Colliers International, Hybrid Working Occupier Survey, 2021

³² ONS, Characteristics of Homeworkers, 2023

in the UK transporting more than Felixstowe, Southampton and Liverpool ports combined each year. This makes Hillingdon a highly attractive location for warehousing and logistics businesses in turn driving demand for warehousing. The size and scale of passenger operations also attracts businesses that directly supply airlines further underpinning demand for warehousing and logistics space.

If Heathrow proceeds with the construction of a third runway this will generate significant additional demand for warehousing space locally as the volume of cargo and passengers would increase substantially. The delivery of a new runway is, however, beyond the timescales of the new *Local Plan* period (2023-2038) and this study.

That said, Heathrow has plans to double the amount of cargo moving through the airport from 1.54m tonnes per annum (2016) to over 3m tonnes by 2040 using the existing two runways – they plan to do this by improving infrastructure, investing in new automated systems and streamlining existing processes³³. Much of the additional space required to handle this increase is expected to be met through (a) the redevelopment and expansion of existing cargo facilities on-site to the south of the Southern Runway and (b) through the delivery of additional freight forwarding warehouses just off the airport in a consolidated cluster to the south. While these schemes will absorb most demand for logistics and warehousing space there is likely to be some additional demand from linked businesses in locations close to the airport.

The limitation with the labour demand projections from Experian is that they are unlikely to fully capture future demand for warehousing and logistics space in Hillingdon as they reflect historic employment growth in the sector at the local level which is likely to have been constrained by borough's tight industrial market and a lack of space for the delivery of new space on clean sites – the market is likely to have experienced 'suppressed demand'.

If the market was unconstrained the sector may have seen greater levels of growth than it has done in the past, perhaps in line with national growth rates, given the borough's strategic location and advantages. Moving forward the British Property Forum (BPF) estimate that between 2013 and 2035 the logistics sector will see a +31% increase in FTE roles at the national level, which is higher than the overall +20% increase in FTEs expected for the whole country across all sectors over the same period³⁴. The Experian projections also do not appear to factor in the potential off-site demand that may arise from the doubling of cargo throughput at Heathrow airport by 2040.

(optimistic) or slightly below (conservative) this moving forward -- the baseline figures for the sector have been adjusted to increase by +31% (optimistic) or +25% (conservative) by 2038.

Decentralisation of Business Administration Activities

Experian sector projections indicate that Hillingdon's Business Administration and Support Services sector is expected to grow by +5,800 FTE jobs between 2022 and 2038 which is equivalent to +341 FTE jobs per annum. While this is significantly higher than the level of change experienced between 2015 and 2021, it is local sector specialism and has historically seen levels of growth much higher than this.

The main concern from a demand perspective is that many of the jobs that will be generated from the sector are likely to come from employment agencies, support services, cleaning businesses, security services and other similar enterprises. Often businesses of this nature have their registered offices in a particular location, which act as 'pay points', but have employees working across a much more extensive area – this means that they often generate much lower demand for office space than other types of businesses. Employment Land Reviews therefore typically assume that only a small a proportion of jobs generated by the sector require employment floorspace locally.

Based on an understanding of the sector, and approaches used for similar studies, it has been assumed that between 20% (conservative) and 30% (optimistic) of jobs generated by Experian's Administration and Support Services category will create demand for office space.

³³ Heathrow, Cargo Strategy, 2021

³⁴ British Property Federation, Delivering the Goods, 2015

4.21 If the adjustments set out in the table above are applied to the base Experian and GLA projections it has the following impact on floorspace demand:

- Experian: Projected employment changes to **+9,492-11,557** FTE jobs which equates to a greater floorspace requirement of **+244,300-299,010** sqm. The main difference versus the 'base' forecasts is that the use class that demands the most floorspace is now B8 Warehousing (+116,145-136,393 sqm versus +72,267 sqm) instead of office space.
- GLA: Projected employment changes to **+7,817-9,892** FTE jobs which equates to a greater floorspace requirement of **+187,248-241,983** sqm. Again, B8 warehousing has become the use class that demands the most floorspace (+90,689-112,590 sqm versus 23,747 sqm) ahead of office space.

Table 20 Adjusted Labour Demand Floorspace Projection Results (2022-2038)

	Adjusted Experian Labour Demand Scenario				Adjusted GLA Labour Demand Scenario			
	Jobs (FTE)		Floorspace (sqm)		Jobs (FTE)		Floorspace (sqm)	
	Conservative	Optimistic	Conservative	Optimistic	Conservative	Optimistic	Conservative	Optimistic
EG(i)/(ii) (office)	+6,826	+8,621	+88,732	+120,688	+6,194	+7,913	+80,523	+110,782
B2/EG(iii) (industrial)	+1,095	+1,165	+39,423	+41,929	+445	+517	+16,036	+18,611
B8 (warehousing)	+1,508	+1,771	+116,145	+136,393	+1,178	+1,462	+90,689	+112,590
Total	+9,492	+11,557	+244,300	+299,010	+7,817	+9,892	+187,248	+241,983

Source: Experian, GLA, Avison Young, ONS, British Property Federation, HCA

Focus On: Data Centres

Hillingdon is an attractive location for data centres and a significant number have opened within warehouse-type structures over the past five years – analysis undertaken by LBH illustrates that the borough has at least eight in total equating to almost 200,000 sqm of space.

Hillingdon is an ideal location for data centres as it provides easy access to fibre optic networks that cross the Atlantic. West London, incorporating Slough, also has the second largest data centre market in the world – this makes it highly attractive to data centre providers who prefer to deliver centres close to one another to enable a 'parent and child' model that allows them to provide back up to one another.

The existing concentration of data centres, alongside the area's strategic location, could drive demand for more employment land for data centres in the future. In their 2023 *Global Data Centre Outlook* JLL write the following about centres in London:

"Demand for data centre space in this market is there, with record levels of pre-leasing activity this year. London reached more than double the amount take up in pre-lets, with a substantial amount of demand due to come online in 2023 and 2024. London saw 90MW of new supply added in 2022 a growth of 11% for the biggest colocation data centre market in Europe. London now has 906MW at the end of 2022, almost doubling in size from the end of 2016".

Hillingdon and West London cannot, however, accommodate any more data centres at present as the area has significant electrical capacity constraints due to the rapid rise in these facilities across the area. As set out in the GLA's *West London Electrical Capacity Constraints (2022)* document:

“The scale of electricity demanded by data centres has created capacity constraints on both the distribution and transmission networks in the region, absorbing remaining electricity capacity in SSEN’s West London region for the remainder of the decade”.

While Hillingdon had a small amount of capacity at the time the GLA’s report was written, the context has changed following the opening of a number of new data centres in the borough according to LBH.

Due to this, no specific adjustments have been made to the demand and need assessment in relation to data centres. The base Experian and GLA scenarios take into consideration future demand from data centres to an extent, based on past trends, but no specific uplift has been applied and there have been no changes to employment densities.

The latter point is important to note as employment densities are likely to be different for data centres compared to other types of warehousing uses. While there is no industry-standard employment density figure for data centres, which links to significant variations within the sector, evidence from the US Chamber of Commerce suggests that a ‘typical’ data centre is around 15,000 sqm (GIA) and employs in the region of 160 people – this equates to an employment density in the region of 95 sqm per employee which is around 24% higher than the employment density used for B8 uses in this study³⁵.

If the electrical infrastructure position changes in Hillingdon during the Local Plan period it would therefore be sensible to plan for slightly more employment floorspace and land than set out in this scenario. The figures are unlikely to change significantly as the base scenarios ‘bake in’ some levels of expected change, but small adjustments to the employment density could lead to an uplift in employment and associated floorspace for warehousing type uses.

Scenario 3: Past Development Rates

4.22 The third scenario projects forward past employment floorspace completion rates to determine future floorspace requirements. As they reflect market demand and actual development patterns on the ground, these rates can provide a reasonable basis for informing future land needs particularly when analysed over several years.

4.23 Monitoring data on past completion rates by use class was provided by LBH from its Authority Monitoring Reports (AMR) to undertake the assessment. As shown in Table 21 below, net completions for office (EG(i)/(ii)), general industrial (B2/EG(iii)) and distribution (B8) totalled to around **+12,088** sqm between the 2014/15 and 2020/2021 financial years, which translates to **+1,726** sqm each year on average across the period. Broken down by use class this equates to:

- EG(i)/(ii) (office) – **-42,383** sqm in total or -6,055 sqm each year on average.
- B2/EG(iii) (general industrial) – **+27,353** sqm in total or +3,908 sqm each year on average.
- B8 (warehousing) – **+27,118** sqm in total or +3,874 sqm each year on average.

Table 21: Employment Space Completions (2014/15-2020/2021 Financial Years)

	Total Net Completions (SQM)	Average Net Annual Completions (SQM)
EG(i)/(ii) (office)	-42,383	-6,055
B2/EG(iii) (general industrial)	+27,353	+3,908
B8 (warehousing)	+27,118	+3,874
Total	+12,088	+1,727

Source: LBH and Avison Young, 2023

³⁵ US Chamber of Commerce, Data Centres: Jobs and Opportunities in Communities Nationwide, 2017

- 4.24 If annual past net completion rates are extended over the new 15-year *Local Plan* period this would lead to a total net employment floorspace requirement of **+25,905** sqm which is much lower than identified for the Experian Labour Demand Projection (Scenario 1: 217,627 sqm), GLA Labour Demand Projection (Scenario 1: 121,535 sqm) and the Adjusted Labour Demand Projections. This equates to the following requirement for each broad use class category by 2038 (see Table 22):
- EG(i)/(ii) (office) – **-90,821** sqm by 2038.
 - B2/EG(iii) (general industrial) – **+58,614** sqm by 2038.
 - B8 (warehousing) – **+58,110** sqm by 2038.
- 4.25 Using the same employment densities used for previous scenarios it is possible to estimate that this change in floorspace would lead to a loss of in the region of **-6,699** jobs under this scenario which is equivalent to around 447 jobs per year.

Table 22: Projected Net Floorspace Requirement Based on Past Development Rates (2023-2038)

	Assumed Annual Net Floorspace Change (SQM)	Total Net Floorspace Change Over 15 Years (SQM)	Total Employment Supported
EG(i)/(ii) (office)	-6,055	-90,825	-9,082
B2/EG(iii) (general industrial)	+3,908	+58,620	+1,628
B8 (warehousing)	+3,874	+58,110	+755
Total	+1,727	+25,905	-6,699

Source: LBH. HCA and Avison Young, 2023

Scenario 4: Past Take Up Rates

- 4.26 The fourth scenario projects forward past employment floorspace take-up figures to understand future floorspace requirements. Like the Past Development Rates scenario (Scenario 3), these figures reflect market demand and take-up patterns on the ground so also provide useful insights into future land needs. The difference versus the development rates scenario is that this approach focuses on the occupation of floorspace rather than its delivery.
- 4.27 Net absorption data from Co-Star has been used to determine future floorspace requirements – this is better than using take-up figures as it considers floorspace that has been vacated as well as occupied. As Table 23 illustrates, total net absorption for office (EG(i)/(ii)), general industrial (B2/EG(iii)) or distribution (B8) was **+2,353,707** sqm between 2015 and 2022 which equates to around **+294,213** sqm each year on average. By use class this is:
- EG(i)/(ii) (office) – **+258,237** sqm in total or 32,280 sqm each year on average.
 - B2/EG(iii) (general industrial) – **+1,414,939** sqm in total or 176,867 sqm each year on average.
 - B8 (warehousing) – **+680,531** sqm in total or 85,066 sqm each year on average.

Table 23: Employment Space Take-Up (2015-2022)

	Total Net Absorption (SQM)	Annual Net Absorption (SQM)
EG(i)/(ii) (office)	+258,237	+32,280
B2/EG(iii) (general industrial)	+1,414,939	+176,867
B8 (warehousing)	+680,531	+85,066
Total	+2,353,707	+294,213

Source: CoStar and Avison Young, 2023

4.28 If annual net annual absorption rates are extended over the new *Local Plan* period this would lead to a total net employment floorspace requirement of just under **+4,413,196** sqm which significantly higher than all other scenarios. This equates to the following requirement for each broad use class category by 2038 (see Table 24):

- EG(i)/(ii) (office) – **+484,200** sqm by 2038.
- B2/EG(iii) (general industrial) – **+2,653,005** sqm by 2038.
- B8 (warehousing) **+1,275,990** sqm by 2038.

4.29 Using the same employment densities used for previous scenarios it is possible to estimate that this additional floorspace will accommodate in the region of **+138,686** jobs under this scenario which is equivalent to around 9,246 jobs per year.

Table 24: Projected Net Floorspace Requirement Based on Past Take Up Rates (2023-2038)

	Assumed Annual Net Floorspace Change (SQM)	Total Net Floorspace Change Over 15 Years (SQM)	Total Employment Supported
EG(i)/(ii) (office)	+32,280	+484,200	+48,420
B2/EG(iii) (general industrial)	+176,867	+2,653,005	+73,695
B8 (warehousing)	+85,066	+1,275,990	+16,571
Total	+294,213	+4,413,195	+138,686

Source: CoStar, HCA and Avison Young, 2023

Employment Land Requirements

4.30 The additional employment floorspace figures that emerge from the four scenarios are set out in Table 25 below.

Table 25: Summary of Additional Floorspace Needs by Scenario (SQM) (2022-2038)

	EG(i)/(ii) (office)	B2/EG(iii) (general industrial)	B8 (warehousing)	Total
Scenario 1: Labour Demand (Experian)	+105,843	+39,517	+72,267	+217,627
Scenario 1: Labour Demand (GLA)	+84,622	+13,166	+23,747	+121,535
Scenario 2: Adjusted Labour Demand (Experian Conservative)	+88,732	+39,423	+116,145	+244,300
Scenario 2: Adjusted Labour Demand (Experian Optimistic)	+120,688	+41,929	+136,393	+299,010
Scenario 2: Adjusted Labour Demand (GLA Conservative)	+80,523	+16,036	+90,689	+187,248
Scenario 2: Adjusted Labour Demand (GLA Optimistic)	+110,782	+18,611	+112,590	+241,983
Scenario 3: Past Development Rates	-90,825	+58,620	+58,110	+25,905
Scenario 4: Past Take Up Rates	+484,200	+2,653,005	+1,275,990	+4,413,195

Source: Experian, GLA, Avison Young, ONS, British Property Federation and US Chamber of Commerce; Co-Star, LBH, HCA

4.31 The final step is to translate these into employment land requirements. This is traditionally done by converting EG(i)/(ii) (office) and B2/EG(iii) (light industrial) floorspace figures from NIA and GIA respectively to GEA by increasing the floorspace values by 20% and 5%, before applying plot ratio assumptions to the GEA

figures – plot ratios provide a measure of the quantum of land assumed to be required to accommodate the floorspace. The plot ratios used in this assessment reflect the standard site coverage of development with allowance for parking, access, servicing etc and in the case of offices the likely form of more urban town centre provision compared to business park typologies:

- EG(i)/(ii) (office) – 2.
- B2/EG(iii) (general industrial) – 0.4.
- B8 (warehousing) – 0.4.

4.32 The results of this 'traditional' approach are set out Table 25 below. This shows that:

- EG(i)/(ii) (office) land requirements vary from **-5.1 ha** to **+29.1 ha** of employment land.
- B2/EG(iii) (general industrial) requirements vary from **+3.5ha** to **+696.4 ha** of employment land.
- B8 (warehousing) requirements vary from **+5.9 ha** to **+319 ha** of employment land.

4.33 Given (a) Hillingdon's land constraints, (b) the borough-wide opportunity to optimise brownfield land through intensification and (c) the continuing evolution of employment space typologies to make better use of land in urban environments it is recommended that the focus for future planning policy is on the delivery of the floorspace rather than the land requirements set out below.

Table 26: Additional Employment Land Need by Scenario (Ha) (2022-2038)

	EG(i)/(ii) (office)	B2/EG(iii) (general industrial)	B8 (warehousing)	Total
Scenario 1: Labour Demand (Experian)	6.4	10.4	18.1	34.9
Scenario 1: Labour Demand (GLA)	5.1	3.5	5.9	14.5
Scenario 2: Adjusted Labour Demand (Experian Conservative)	5.3	10.3	29.0	44.6
Scenario 2: Adjusted Labour Demand (Experian Optimistic)	7.2	11.0	34.1	52.3
Scenario 2: Adjusted Labour Demand (GLA Conservative)	4.8	4.2	22.7	31.7
Scenario 2: Adjusted Labour Demand (GLA Optimistic)	6.6	4.9	28.1	39.6
Scenario 3: Past Development Rates	-5.4	15.4	14.5	24.5
Scenario 4: Past Take Up Rates	29.1	696.4	319.0	1,044.5

Source: Experian, GLA, Avison Young, ONS, British Property Federation and US Chamber of Commerce; Co-Star, LBH, HCA

Preferred Scenario

4.34 Each scenario presented in this chapter sets out the potential impact of changes to Hillingdon's economy on future employment floorspace needs. The scenarios do, however, have some limitations when assessing future requirements. For example:

- The Scenario 1 'base' labour demand forecasts from Experian and the GLA do not fully reflect the local context and market signals, particularly in relation to the changing nature of office work and the rising importance of logistics.
- The Scenario 3 development rates forecast simply projects forwards historic trends in floorspace delivery, which is more likely to reflect Hillingdon's constrained land supply and market than be a true representation of past and future demand. The most recent figures from the Planning London Datahub have also not been subject to data quality assurances at this time.

- The Scenario 4 past take up data leads to anomalous projections and does not correlate with the development rates data suggesting that take-up may not fully reflect 'new' demand but rather churn from existing local businesses.

4.35 The adjusted labour demand forecasts from Scenario 2 are likely to be the best estimate of future demand as they take the base forecasts from Experian and the GLA, which are themselves underpinned by historic economic and demographic signals, and adjusts them to better reflect the local context. It is therefore recommended that they are taken forward as the central case for the estimate of future employment floorspace requirements.

4.36 Within the forecast itself it is recommended that the Experian floorspace figures are taken forward rather than GLA's as the latter 'bake in' the implications of historic policy decisions, most notably planned losses of employment land, without including any 'allowance' for growth being delivered in other ways or the market adjusting and meeting need through intensification on sites not yet released. The GLA figures represent a continuation of 'status quo' whereas the Experian figures are less constrained and may be more representative of future floorspace demand. Based on this scenario:

- Between **+88,732** and **+120,688** sqm of floorspace is required for office (EG(i)/(ii)) uses by 2038.
- Between **+39,423** and **+41,929** sqm of floorspace is required for general industrial (B2/EG(iii)) uses by 2038.
- Between **+116,145** and **+136,393** sqm of floorspace is required for warehousing (B8) uses by 2038.

Best Practice Adjustments

4.37 Safety margins, also known as flexibility factors, are generally applied to minimum employment floorspace requirements to build additional headroom into figures. This ensures that employment forecasts are based on more than economic growth 'predictions' and better reflect the fluid nature of land allocations.

4.38 Traditionally, Employment Land Reviews apply 'churn' and 'windfall' safety margins:

- Churn makes an allowance for the fact that the locational and space requirements of businesses changes over time necessitating them to move or acquire new premises and/or sites, and that this requires a certain level of vacancy to exist known as 'frictional vacancy'.
- Windfall considers the fact that a proportion of newly designated employment land is likely to be used by non 'B-class' employment uses such as recycling, waste management, combined heat and power plants and bus depots which can, under certain circumstances, be located on employment land.

4.39 These safety margins are typically assessed by using completion and loss data:

- For Churn two years of annual average past net completions is often added to the preferred scenario to reflect that it typically takes around two years to secure planning, undertake site preparation and complete construction after a site has been purchased.
- For Windfall the average annual loss of 'B-class' floorspace by broad use class is often projected across the Local Plan period to estimate how much floorspace and land might be lost to other uses over time.

4.40 Following conversations with LBH, and initial analysis of data using this data, it has however been agreed with LBH that it would be more appropriate to use a more contemporary approach to applying safety margins drawing on guidance from the *London Plan*. This is because there are concerns about the reliability of completion and loss data collected by LBH, and to ensure that the approach is consistent with the *London Plan*.

4.41 Therefore, drawing on the *London Industrial Land Demand Report (2017)* and *London Office Policy Review (2017)*, 8% has been added to industrial and office floorspace projections to allow for a frictional rate of vacancy and efficient market operation. This is considered a 'healthy' vacancy rate as it allows businesses to move and/or acquire new premises or sites as their requirements change. As shown in the table below, taking this approach:

- Increases the amount of floorspace required for office (EG(i)/(ii)) uses by 2038 from +88,732 and +120,688 sqm to **+95,931** to **+130,343** sqm.
- Increases the amount of floorspace required for general industrial B2/EG(iii) uses by 2038 from +39,423 and +41,929 sqm to **+42,577** to **+45,283** sqm.
- Increases the amount of floorspace required for warehousing (B8) uses by 2038 from +116,145 and +136,393 sqm to **+125,437** to **+147,304** sqm.

Table 27: Preferred Scenario, including Allowance for 8% 'Best Practice Adjustment'

	Floorspace Conservative (SQM)	Floorspace Optimistic (SQM)	Land Conservative (Ha)	Land Optimistic (Ha)
EG(i)/(ii) (office)	+95,831	+130,343	+5.7	+7.8
B2/EG(iii) (general industrial)	+42,577	+45,283	+11.2	+11.9
B8 (warehousing)	+125,437	+147,304	+31.4	+36.8
Total	+263,845	+322,930	+48.3	+56.5

Source: Avison Young, 2023

London Plan Sensitivity Tests

- 4.42 While the preferred scenario adjusts the Experian 'base' projections to consider the local context, the employment floorspace projections resulting from the revised employment forecasts are driven by the application of professional judgement to national employment density guidance.
- 4.43 The GLA has, however, recently set out locally specific employment density and plot ratio figures as part of the evidence underpinning the *London Plan* (2021) based on the analysis of employment sites across the capital. To illustrate the impact of using these figures instead of the employment density and plot ratios previously set out, a 'sensitivity test' has been applied to the preferred scenario to illustrate the impact of changing these variables. The key changes include:
1. Decreasing the employment density assumption for office-based sectors (EG(i)/(ii)) to 11.3 in line with the *London Employment Sites Database's* (2021) approach for Outer London.
 2. Decreasing the employment density assumption for warehousing (B8) to 50 in line with the *London Employment Sites Database's* (2021) approach for Outer London.
 3. Increasing the plot ratio assumption for general industrial (B2/EG(iii)) and warehousing (B8) to 0.48 in line with the 'West London' industrial average as per the *London Industrial Land Supply Study* (2022)³⁶.
- 4.44 The impact of making these changes is set out in Table 28 below alongside the original figures from the preferred scenario prior to the application of best practice adjustments. This shows that the total employment floorspace (SQM) requirement falls from between +244,300 and +299,010 sqm to between **+191,970** and **+227,908** sqm. This is primarily driven by a falling requirement for both office and warehousing space as a result of changing the employment density figures for these broad use classes. Broken down by use classes this means:
- Between **+77,128** and **+97,412** sqm of floorspace is required for office (EG(i)/(ii)) by 2038.
 - Between **+39,423** and **+41,929** sqm of floorspace is required for general industrial (B2/EG(iii)) by 2038.
 - Between **+75,419** and **+88,567** sqm of floorspace is required for warehousing (B8) by 2038.

³⁶ This is the plot ratio for sites incorporating 'core' industrial activities as defined in the *London Industrial Land Supply Study*.

Table 28: Sensitivity Test Applied to Preferred Scenario (2022-2038)

	Floorspace Conservative (SQM)	Floorspace Optimistic (SQM)	Land Conservative (Ha)	Land Optimistic (Ha)
Preferred Scenario (Pre Sensitivity Test, not including 8% Best Practice Adjustment)				
EG(i)/(ii) (office)	+88,732	+120,688	+5.3	+7.2
B2/EG(iii) (general industrial)	+39,423	+41,929	+10.3	+11
B8 (warehousing)	+116,145	+136,393	+29.0	+34.1
Total	+244,300	+299,010	+44.6	+52.3
Preferred Scenario (Post Sensitivity Test, not including 8% Best Practice Adjustment)				
EG(i)/(ii) (office)	+77,128	+97,412	+4.6	+5.8
B2/EG(iii) (general industrial)	+39,423	+41,929	+8.6	+9.2
B8 (warehousing)	+75,419	+88,567	+15.7	+18.5
Total	+191,970	+227,908	+28.9	+33.5

Source: Experian, GLA, Avison Young, HCA

4.45 Applying best practice adjustments these figures in line with the approach set out earlier in this report increases the total floorspace requirement to between **+207,328** and **+246,141** sqm as seen in Table 29.

Table 29: Preferred Scenario Post Sensitivity Test, Including 8% Floorspace Uplift (2022-2038)

	Conservative and Optimistic Floorspace (SQM)	Conservative and Optimistic Land (Ha)
EG(i)/(ii) (office)	+83,298 to +105,205	+5.0 to +6.3
B2/EG(iii) (general industrial)	+42,577 to +45,283	+9.3 to +9.9
B8 (warehousing)	+81,453 to +95,652	+17 to +19.9
Total	+207,328 to +246,141	+31.3 to +36.1

Source: Experian, GLA, Avison Young, HCA, London Industrial Land Demand Report, London Office Policy Review

Summary

5.1 The table below provides a summary of future floorspace requirements for Hillingdon over the revised *Local Plan* (2023-2038) period based on the preferred scenario. The top half of the table summarises floorspace needs based on national employment density guidance ('pre sensitivity test'), whereas the bottom half shows floorspace demand based on the application of assumptions from the *London Plan* (2021) evidence base ('post sensitivity test'). The two approaches show that:

- The pre-sensitivity test figures indicate that between **+263,845** and **+322,930** sqm of total employment floorspace needs to be planned for as part of the revised *Local Plan* (2022-2038) taking into account the safety margin. This breaks down by between +95,831 and +130,343 sqm of office (EG(i)/(ii)), +42,577 and +45,283 sqm of general industrial (B2/EG(iii)) and +125,437 and +147,304 sqm of warehousing (B8) space.
- The post-sensitivity test figures indicate that between **+207,328** and **+246,141** sqm of total employment floorspace needs to be planned for as part of the revised *Local Plan* (2022-2038) taking into account the safety margin. This breaks down by between +83,298 and +105,205 sqm of office (EG(i)/(ii)), +42,577 and +45,283 sqm of general industrial (B2/EG(iii)) and +81,453 and +95,652 sqm of warehousing (B8) space.

5.2 **It is recommended that the revised *Local Plan* (2023-2038) provides for the *pre-sensitivity* test figures. While both approaches are robust and appropriate for the context, the employment densities aligned**

to the national guidance are more realistic based on the nature of commercial space and economic activity being undertaken across the borough.

- 5.3 It is also recommended that LBH reviews this position every five years to ensure that the figures remain appropriate and relevant during the course of the revised *Local Plan* (2023-2038) period.

Table 30: Summary of Floorspace Requirements from the Preferred Scenario Pre and Post Sensitivity Test

	Floorspace Conservative (SQM), excluding safety margin	Floorspace Conservative (SQM), including safety margin	Floorspace Optimistic (SQM), excluding safety margin	Floorspace Optimistic (SQM), including safety margin
Preferred Scenario (Pre Sensitivity Test – Based on National Guidance) (RECOMMENDED)				
EG(i)/(ii) (office)	+88,732	+95,831	+120,688	+130,343
B2/EG(iii) (general industrial)	+39,423	+42,577	+41,929	+45,283
B8 (warehousing)	+116,145	+125,437	+136,393	+147,304
Total	+244,300	+263,845	+299,010	+322,930
Preferred Scenario (Post Sensitivity Test – Based on London Plan Evidence) (NOT RECOMMENDED)				
EG(i)/(ii) (office)	+77,128	+83,298	+97,412	+105,205
B2/EG(iii) (general industrial)	+39,423	+42,577	+41,929	+45,283
B8 (warehousing)	+75,419	+81,453	+88,567	+95,652
Total	+191,970	+207,328	+227,908	+246,141

Source: Experian, GLA, Avison Young, HCA

5. Supply Context: Establishing Current and Future Employment Land Supply

Chapter Summary

This chapter provides an overview of existing 'B-class' employment floorspace and land in Hillingdon as of mid-2023. It summarises the results of on-the-ground and desk-based appraisals which were undertaken for a large number of designated and undesignated employment sites across the borough. These appraisals focused on understanding each site's 'suitability' for continued employment use as well what might be 'achievable' and recommended for their future. The key messages from the appraisals include:

- There is an urgent need to enhance and diversify the borough's major office locations (e.g. Uxbridge Town Centre and Stockley Park). While they remain 'suitable' locations for employment uses, the nature and format of the existing office stock could be modernised to better meet the needs of occupiers, and opportunities to introduce a more diverse mix of uses should be considered where they enhance the employment function of these sites. Consolidation could also help reinvigorate office markets, for example by working with occupiers in locations that are not sequentially preferable to relocate to these areas.
- There are a small number of 'peripheral' office sites that are not ideally located for continued office use in their current form (e.g. Salamander Quay and Odyssey Business Park) and may face vacancy challenges moving forward. These are candidates for re-orientation and change of use, but it is recommended that other 'B-class' or 'non B-class' employment uses are considered ahead of residential due to the need to support economic growth locally.
- A number of industrial sites present intensification opportunities, including larger sites such as the Hayes Industrial Area and Uxbridge Industrial Estate alongside a handful of smaller sites (e.g. South of Bath Road and Stonefield Way). Across these sites there are a number of 'recurring' intensification opportunities that the typology and capacity chapters address later in this report – namely surface-level airport parking, car storage/repair yards, surface-level bus storage, open storage yards, low-density/ageing stock and business park car parks among others.
- Most of the borough's other industrial sites are well-utilised and occupied (e.g. North Uxbridge Industrial Estate and Packet Boat Lane). These present few intensification opportunities but should be retained as they play an important role in supporting the borough's economy. Only one site was identified as unlikely to be 'suitable' for intensification or designation as an employment site – South of Maylands Lake. This is because it has poor quality stock, limited connectivity and suffers from high levels of flood risk making development complex. There are also a number of temporary and permanent residential uses within the site making it a highly sensitive location from an employment perspective.

Through this research it has also been possible to estimate that across the sites appraised there are currently 74 properties available with a total floorspace of 162,138 sqm. By use class this equates to:

- 47 office (EG(i)/(ii)) properties, totalling c.130,213 sqm of available floorspace.
- 6 general industrial (B2/EG(iii)) properties, totalling c.7,357 sqm of available floorspace.
- 21 warehousing & distribution (B8) properties, totalling c.24,568 sqm of available floorspace.

There is also some current availability in other parts of the borough. According to CoStar (2023) this totals to:

- 60,441 sqm of available office (EG(i)/(ii)) floorspace.
- 11,348 sqm of available general industrial (B2/EG(iii)) floorspace.
- 8,020 sqm of available warehousing (B8) floorspace.

This availability may go some way to meeting future demand given the quantum available. There are, however, limitations with some of the stock that is available influencing its suitability and attractiveness for

future occupation (e.g. some is in unattractive locations and some is low-quality which may not be appealing to modern occupiers).

Looking to the future, the borough’s current development pipeline could further impact the borough’s employment floorspace supply and availability. Mid-2023 data from LBH shows that there are a total of 48 unimplemented or in progress planning permissions for office (EG(i)/(ii)), general industrial (B2/EG(iii)) and warehousing & distribution (B8) properties in the borough which, if implemented in full, could reduce overall employment floorspace by -68,563 sqm. Broken down by use class, this activity could deliver +25,414 sqm of warehousing (B8) floorspace which is counter-balanced by the expected loss of -24,480 sqm of general industrial space (B2/EG(iii)) and a net reduction of -69,497 sqm of office space if fully implemented.

Borough-Level Supply

- 5.1 Hillingdon has approximately **2,396,783 sqm** of what is traditionally referred to as ‘B-class’ employment space based on the old Use Class Order (see Table 31) and **350 ha** of land. Much of this floorspace (49%) is warehousing (B8) space, followed by office (EG(i)/(ii)) (36%) and general industrial (B2/EG(iii)) uses (15%).
- 5.2 Over the last decade of available data (2012-2022) the borough’s total ‘B-class’ employment floorspace has increased by **+14%** from **2,070,043 sqm** to **2,396,783 sqm** (see Figure 24). This has been primarily driven by increases in industrial type (+15%) floorspace (i.e. B8/B2/EG(iii)).

Table 31 Total Employment Floorspace Stock by Use (SQM) (2022)

	Office (EG(i)/(ii))	General Industrial (B2/EG(iii))	Warehousing (B8)	Total
Total Floorspace	850,940 sqm	372,280 sqm	1,173,563 sqm	2,396,783 sqm
Proportion of Borough Total	36%	15%	49%	100%

Source: CoStar and Avison Young, 2023

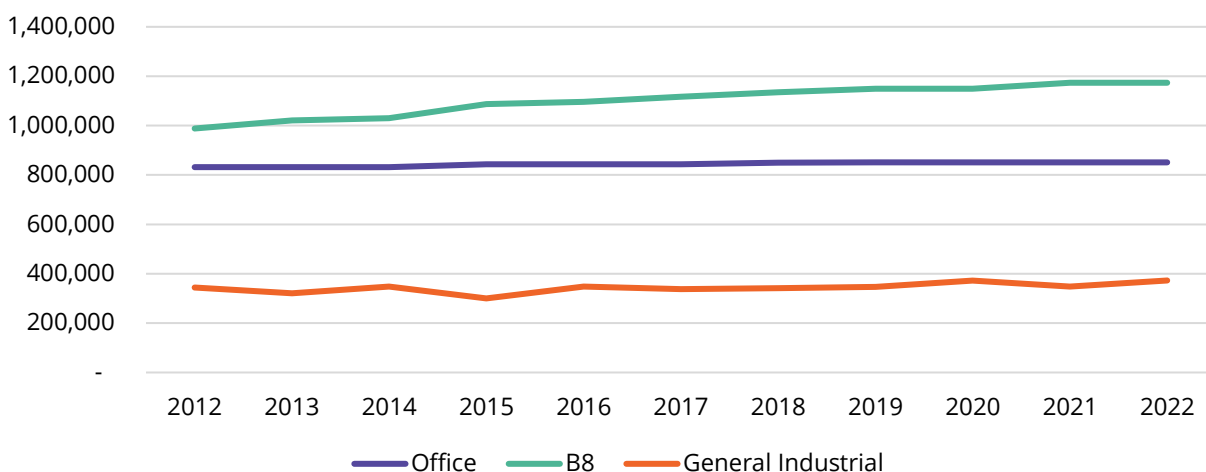


Figure 24: Total Employment Floorspace Stock By Use Over Time (2012-2022) (SQM)

Source: CoStar and Avison Young, 2023

Sub-Area Supply

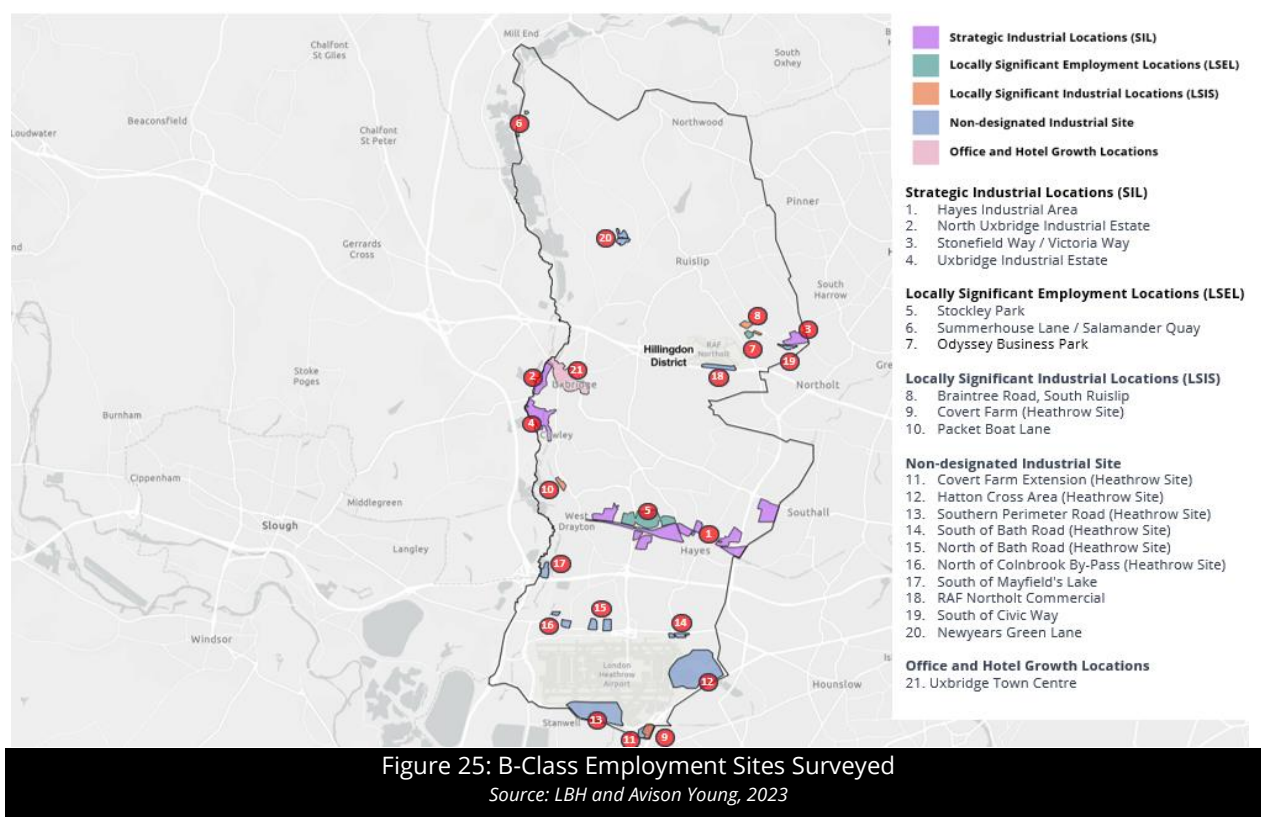
- 5.3 To investigate the nature of this supply in more detail site-specific appraisals of ‘B-class’ employment sites have been undertaken (see Figure 25). These have focused primarily on designated employment sites to determine the degree to which they remain ‘appropriate’ for employment uses. The appraisals also include non-designated employment known by LBH as areas of a significant scale to explore how they should be treated moving forward. It may be possible to identify additional sites that could provide a supply of employment floorspace in the future, which could be identified by other means, including through a call for

sites exercise or by analysing emerging trends in land use changes. This is explored further later in this report.

5.4 In line with PPG guidance all the sites considered are greater than 0.25ha. While small sites play an important role in meeting business needs, this study focuses on those that make a significant contribution to the borough's employment floorspace and/or have the potential to accommodate meaningful levels of future economic growth.

5.5 In total 21 sites have been surveyed which combined provide around 603ha of 'B-class' employment land and 1,822,541 sqm of floorspace. By designation:

- 213 ha is designated SIL land with 889,728 sqm of floorspace.
- 15 ha is designated LSIS land with 80,121 sqm of floorspace.
- 71 ha is designated LSEL land with 170,282 sqm of floorspace.
- 52 ha designated as being hotel and office growth locations with 176,514 sqm of floorspace.
- 252 ha is undesignated land with 505,897 sqm of floorspace.



5.6 These appraisals, which have involved a combination of on-the-ground and desk-based analysis, explore a wide range of parameters for each site from accessibility to the quality of commercial stock – detailed records are presented in Annex I.

5.7 The information collected and presented has subsequently been used to undertake three assessments for each site that align with the PPG's 'Availability', 'Suitability' and 'Achievability' methodology. This process enables a shortlist of sites to be identified that present opportunities and can form part of the borough's functional supply of employment land. The three steps are set out below in more detail:

1. **Availability:** Firstly, each site has been assessed to identify whether there is 'availability' to develop vacant plots or the potential to re-develop and/or intensify active but underutilised areas.
2. **Suitability:** Secondly, sites have been assessed to determine how well suited they are to continue supporting employment uses as well as further development. Drawing on the detailed analysis presented for each site in Annex 1, this has involved scoring each site against the 'employment quality

criteria' set out in the table below on a scale of 1-5 using Avison Young's professional judgment³⁷. An average overall score has been calculated for each site to provide an indication of their suitability to continue supporting employment uses and further development.

To add detail to this, each site has been assessed to determine which broad employment uses are most appropriate (i.e. Office, General Industrial and Warehousing) and which ancillary uses could be supported. Ancillary uses are suggested where they will enhance the overall employment offer, but are not recommended to replace or dominate the broad uses that are deemed most appropriate.

Table 32 Criteria Underpinning Suitability Assessments

Employment Quality Criteria	Description	Questions Considered
Location Character	Consideration of the character of the site ranging from highly residential sites to dense employment sites. Highly residential sites are generally less suitable for employment uses than areas with more commercial activity, particularly more industrial type activities ³⁸ .	<ul style="list-style-type: none"> Do residential uses adjoin the site? Are neighbouring uses separated by roads, rail, rivers and/or other green space? Are the on-site uses loud, noisy, polluting and/or 'bad neighbours'? Do the on-site uses generate significant vehicle movements? Does the building type and scale detract from the character of the local area?
Building Age and Quality	Consideration of the current condition of the commercial property stock ranging from older and lower-quality stock to modern and high-quality stock. The quality and age of the stock plays a role in determining whether an area can be expected to attract new investments and/or go through re-development.	<ul style="list-style-type: none"> Are commercial buildings older or younger than 30 years? What rating are the commercial buildings given by Co-Star? Do commercial buildings look modern / fit-for-purpose and would they be attractive to occupiers? Does the commercial stock appear to be in fair or good condition i.e. not in a state of disrepair? Are higher-quality and more modern buildings currently occupied?
Neighbouring Amenities	Consideration of the presence of local amenities. Proximity to local amenities (such as restaurants, cafes, bars, supermarkets, gyms etc) is usually valued by businesses, particularly office-based occupiers.	<ul style="list-style-type: none"> Is the site within a ten – twenty minute walk of a town centre of high street? Are there any shops or cafés on site? Do any food vans or stalls set up on site on a regular or semi-regular basis? Are there any 'after work' F&B uses e.g. pubs or bars, close to the site? Are there any health, leisure or wellbeing uses within a ten to twenty minute walk of the site (e.g. gym, cinema, barber, hairdresser etc)?
Adequate Access and Parking	Consideration of the accessibility of the site to the road network and the existence of adequate parking or yard areas. Accessibility and the availability of parking are important to most industrial businesses, particularly those with large workforces and those requiring regular deliveries. Locations that are difficult to access, for example, via country lanes or residential areas, are less suitable for employment uses.	<ul style="list-style-type: none"> Do vehicles have direct / unencumbered access to the strategic road network? i.e. not required to utilise narrow country roads or small residential roads. Do vehicle have to share roads with other uses i.e. residential? Is there sufficient parking at different times of the day and week? Is parking ordered and well-managed? Do units have sufficient yard areas or is storage spilling out onto the road?

³⁷ 1 = Very poor quality, 2 = Poor quality, 3= Fair quality, 4= Good quality; 5 = Very good quality.

³⁸ In assessing location character for office-dominated sites it has been considered that sites outside of town centres / transport interchanges are not sequentially preferable for offices in line with national and regional planning policy. The exception is Stockley Park which is listed in Policy E1 of the London Plan as an existing urban business park where consolidation and/or extension of office floorspace should take place.

		<ul style="list-style-type: none"> • Are any occupiers taking up excessive amounts of parking on site (e.g. vehicle repair companies)?
Vacancy of Land and Buildings	Consideration of the level of underutilised / vacant land and floorspace ranging from high to low. High levels of vacant land and unoccupied buildings generally indicates low levels of demand from occupiers.	<ul style="list-style-type: none"> • Are vacancy rates above the 8% 'healthy' vacancy rate? • Is land well-utilised/ organised or are pockets of underutilised space that present clear development opportunities? • Is the location attractive to occupiers? • Are car parks busy or empty?
Proximity to a Station	Consideration of whether there is a station close to the site. Similarly, to the proximity to local amenities, this will be favoured by all businesses but particularly office-based businesses undertaking professional service activities.	<ul style="list-style-type: none"> • Is there a station within a 15 to twenty minute walk of the site? • Are there any bus stops close to the site that provide connectivity to stations?
Proximity to the Road Network	Consideration of whether the site has good proximity and access to major trunk roads. This is considered a benefit for many occupiers, but particularly heavier industrial businesses and those operating transportation and distribution activities.	<ul style="list-style-type: none"> • Is there direct access onto the strategic road network? • Is the strategic road network within a short drive from the site?
Alignment and Policy	Alignment and contribution to national and local place-based and regeneration policy.	<ul style="list-style-type: none"> • Do the uses on site align with local site allocation policy? • Do the uses on site align with local and regional economic development strategies? • Do the uses on site respond to local and regional demand signals? • Are there any uses on site that provide 'higher-value' economic activities that make an important contribution productivity?

3. **Achievability:** Thirdly, sites have been assessed to consider what might be 'achievable' on each in the future. Using the suitability assessment, wider insights related to landownership, knowledge of planning policy restrictions and professional judgement about the attractiveness of sites to developers, a classification has been assigned to each. One of six potential classifications are identified:

- **Remain** an employment site: Sites to be retained in their current use which are characterised by a high occupancy of the site and good quality of buildings. Retention is focused on maintaining the existing capacity of the site for similar employment uses and space typologies - redevelopment and improvements to these sites should be supported, but the focus should be on retaining the existing character of employment activity.
- **Intensify** the employment site: Sites that generally provide low density employment, high vacancy of space and/or inefficient use of the space by the current uses. Access to the transport network, particularly to the road network for industrial employment uses, will increase the potential of sites to be intensified. Sites earmarked for intensification can (a) re-provide space for existing employment uses in a more intense configuration (b) use vacant land to provide additional employment space or (c) replace the existing employment uses with more intense 'B-class' employment uses.
- **Co-locate** with complementary uses: Recommended on sites that present re-development opportunities and are close to public transport and amenities (i.e. town centres) where different employment and non-employment generating uses could be accommodated in combination. The *London Plan* defines mixed-use development as "development for a variety of activities on single sites or across wider areas such as town centres".
- **Re-orient** the offer of the site: Sites that have a specific employment focus (e.g. office) but suffer from higher-than-average vacancy rates, a low-quality offer and/or locations that are less attractive that could support a different type of employment generating use (e.g. industrial, hotel, leisure, wellbeing, healthcare etc).
- **Exclude** as an employment site: Sites that have issues around their use as employment sites (i.e. problem of accessibility or conflicting use with the character of the neighbouring area) that may affect

their future operational viability, have limited intensification or other employment generating use redevelopment potential or offer a high potential for residential use and may be considered to support the Borough's housing targets.

- **Extend** the employment site: Sites that should remain employment sites but could be extended onto adjacent land that is underutilised or poorly utilised and not currently in employment use.

5.8 It is important to note that at this stage these judgements are agnostic to whether a site is designated or undesignated – the recommendations set out here focus on the most suitable option for the sites based on the evidence collected. These judgements are used in the Conclusion at the end of the report to identify which sites should remain or become designated based on the level of need identified following demand-supply calculations.

5.9 A high-level overview of the characteristics of each site and the results of these assessments is provided in Table 33 below. Those that are identified as having intensification and/or co-location opportunities have been considered as part of the capacity assessment set out later in this report.

Table 33: Site List and Summary

Site Number	Site Name and Designation	Site Area (Ha)	Existing Employment Uses	Floorspace By Use Types	Available?	Suitability Score	Suitable Employment Uses	Achievable ? (i.e. Classification)	Vacant Land (Ha)	Vacant Floorspace (SQM) by Use Type
1	Hayes Industrial Area SIL	142	Office General Industrial Warehouse	Office: 12,352 General Industrial: 120,571 Warehouse: 461,824	Yes	3.2	Industrial, Light Industrial, Warehouse, Distribution, Wholesale	Various	0	Office: 0 General Industrial: 6,785 Warehouse: 8,950
2	North Uxbridge Industrial Estate SIL	18	Office General Industrial	Office: 48,266 General Industrial: 2,963 Warehouse: 31,636	Yes	3.7	Ancillary, Warehouse, Office, Distribution, Wholesale	Remain, Re-orient and Intensify	0	Office: 2,290 General Industrial: 0 Warehouse: 4,020
3	Stonefield Way / Victoria Road SIL	17	General Industrial	Office: 2,423 General Industrial: 16,931 Warehouse: 48,836	Yes	3.7	Ancillary, Warehouse, Big Box Retail, Light Industrial, Industrial	Remain and Intensify	0.74	Office: 0 General Industrial: 0 Warehouse: 422
4	Uxbridge Industrial Estate SIL	37	Office General Industrial	Office: 21,675 General Industrial: 25,804 Warehouse: 96,447	Yes	2.8	Warehouse, Service, Manufacturing, Light Industrial, Ancillary	Intensify and Re-orient	0	Office: 6,822 General Industrial: 572 Warehouse: 2,064
5	Stockley Park LSEL	67	Office	Office: 148,386 General Industrial: 0 Warehouse: 0	Yes	3.4	Office, Workspace, Other	Re-orient	0	Office: 59,791 General Industrial: 0 Warehouse: 0
6	Summerhouse - Salamander Quay LSEL	1	Office	Office: 8,016 General Industrial: 192 Warehouse: 0	Yes	2.8	Office, Other, Light Industrial, Non B-class uses	Re-orient	0	Office: 601 General Industrial: 0 Warehouse: 0
7	Odyssey Business Park LSEL	3	Office	Office: 13,689 General Industrial: 0 Warehouse: 0	Yes	3.8	Office, Other, Non B-class uses	Re-orient	0	Office: 3,331 General Industrial: 0 Warehouse: 0
8	Braintree Road LSIS	3	General Industrial	Office: 894 General Industrial: 4,452 Warehouse: 12,584	No	3.2	Ancillary, Light Industrial, Local Servicing	Remain and Intensify	0	Office: 0 General Industrial: 0 Warehouse: 0
9	Covert Farm LSIS	8	Office General Industrial Warehouse	Office: 1,818 General Industrial: 0 Warehouse: 41,315	No	4.1	Light Industrial, Industrial, Warehouse, Distribution	Remain and Intensify	0	Office: 0 General Industrial: 0 Warehouse: 0

10	Packet Boat Lane LSIS	4	General Industrial	Office: 0 General Industrial: 8,651 Warehouse: 12,933	Yes	3.2	Light Industrial, Industrial, Workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 3,191
11	Covert Farm Extension Non-Designated Site	4	Office General Industrial Distribution	Office: 0 General Industrial: 0 Warehouse: 11,287	Yes	4.0	Light Industrial, Distribution, Warehouses, Airport Related Uses	Extend	1.05	Office: 0 General Industrial: 0 Warehouse: 0
12	Hatton Cross Non-Designated Site	121	Office General Industrial Warehouse Other	Office: 92,423 General Industrial: 292 Warehouse: 36,459	No	3.8	Ancillary, Light Industrial, Industrial, Airport Related Uses	Remain and Intensify	2.05	Office: 0 General Industrial: 0 Warehouse: 0
13	Southern Perimeter Road Non-Designated Site	74	Office Warehouse	Office: 325 General Industrial: 0 Warehouse: 210,251	No	3.8	Airport Related Uses, Warehouse, Distribution	Remain	0	Office: 0 General Industrial: 0 Warehouse: 1,070
14	South of Bath Road Non-Designated Site	5	General Industrial	Office: 4,338 General Industrial: 0 Warehouse: 0	No	3.6	Ancillary, Light Industrial, Automotive Related Activities	Remain and Intensify	0	Office: 0 General Industrial: 0 Warehouse: 0
15	North of Bath Road Non-Designated Site	8	Office Warehouse	Office: 15,868 General Industrial: 4,000 Warehouse: 37,603	Yes	3.7	Office, Distribution, Warehouse, Wholesale, Airport Related Uses	Remain and Reorient	0	Office: 5,149 General Industrial: 0 Warehouse: 0
16	North of Colnbrook By-Pass Non-Designated Site	7	Office Warehouse	Office: 9,121 General Industrial: 0 Warehouse: 28,902	Yes	3.2	Office, Wholesale, Light Industrial, Airport Related Uses	Remain	0	Office: 0 General Industrial: 0 Warehouse: 3,182
17	Mayfields Lake Non-Designated Site	8	General Industrial	Office: 0 General Industrial: 4,535 Warehouse: 0	Yes	1.9	Light Industrial, Service, Industrial	Exclude	0.25	Office: 0 General Industrial: 0 Warehouse: 3,716
18	RAF Northolt Non-Designated Site	11	Other	Data Not Available	Yes	2.4	Airport Related Uses, Office, Industrial	Remain	0.39	Office: 0 General Industrial: 0 Warehouse: 0
19	South of Civic Way	4	Other	Other: 3,920	No	3.2	Heavier Industrial Uses,	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0

Non-Designated Site				Waste Related Uses						
20	New Year's Green Lane Non-Designated Site	10	Other	Office: 0 General Industrial: 2,466 Warehouse: 0	No	3.1	Heavier Industrial Uses, Waste and Recycling Uses	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
21	Uxbridge Town Centre Office Growth Area	52	Office	Office: 173,419 General Industrial: 0 Warehouse: 0	Yes	3.6	Office, Light Industrial, Workspace	Re-orient	0	Office: 52,229 General Industrial: 0 Warehouse: 0

Source: CoStar and Avison Young, 2023

5.10 To support the analysis of these sites, and provide an overarching view of the characteristics and opportunities for sites that are close together, they have been grouped into six clusters:

- A. Heathrow, incorporating: Covert Farm Extension, Covert Farm, Southern Perimeter Road, Hatton Cross, South of Bath Road, North of Bath Road and North of Colnbrook By-Pass (7 in total).
- B. Hayes Corridor, excluding Stockley Park 'office area' but incorporating: Hayes Industrial Area, Mayfields Lake, and Packet Boat Lane (3 in total).
- C. Uxbridge, incorporating: North Uxbridge Industrial Estate, Uxbridge Industrial Estate and Uxbridge Town Centre (3 in total)
- D. Ruislip, incorporating: RAF Northolt, Odyssey Business Park, South of Civic Way, Stonefield Way/Victoria Way, and Braintree Road (5 in total).
- E. North Hillingdon, incorporating: New Year's Green Lane and Summerhouse Lane / Salamander Quay (2 in total).
- F. Stockley Park, incorporating Stockley Park 'office area' only (1 in Total).

5.11 These clusters draw together a borough-wide consideration of 'B-class' employment land supply and the conditions that shape the attractiveness of locations for different types of employment activity, as well as showing the simple geographic clustering of different employment activities within the borough as evident in Figure 26. A full description of each cluster and the results of the three assessments undertaken for each site are set out in the rest of this chapter.

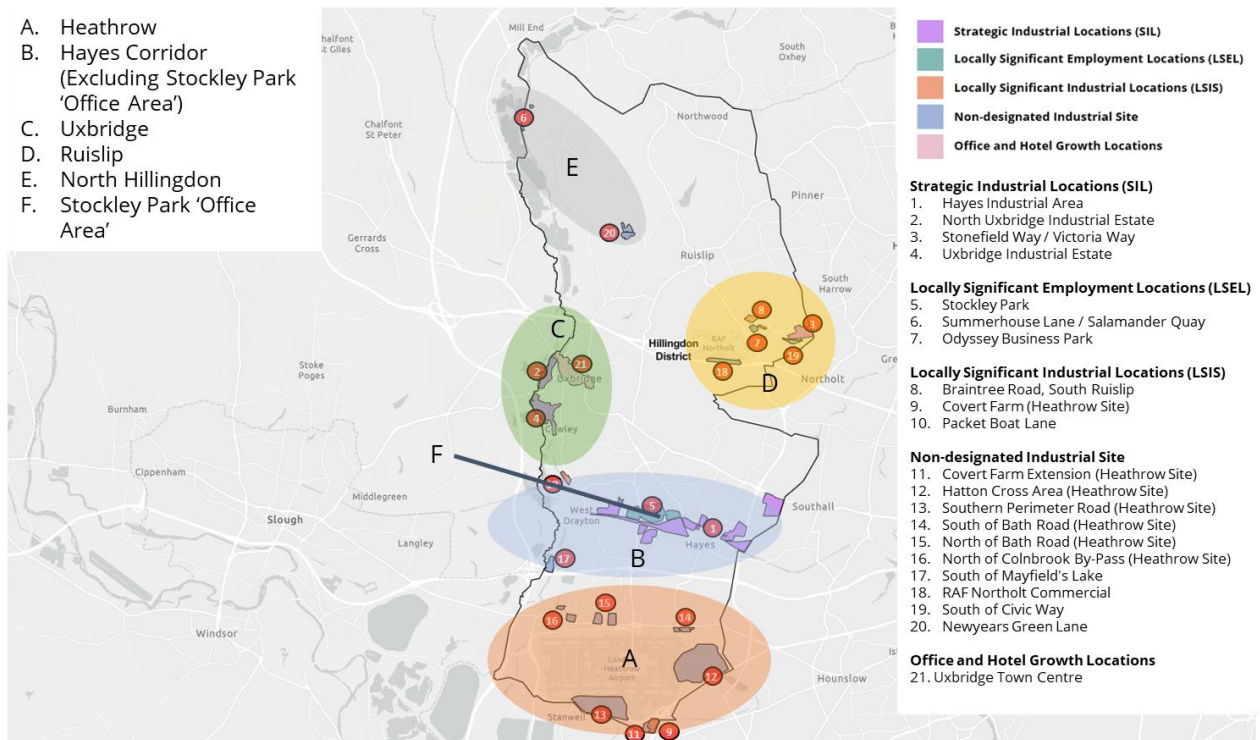


Figure 26: B-Class Employment Sites Clusters

Source: LBH and Avison Young, 2023

Cluster A: Heathrow

5.12 The Heathrow cluster is located to the south of the borough with sites surrounding Heathrow airport. It has excellent air, road and rail connectivity via Heathrow, the M4, M25, Heathrow Express, Elizabeth Line and Piccadilly Line.

5.13 The cluster comprises seven employment sites that have been appraised as part of this study which cover an area of over 227 Ha and provide c.535,582 sqm of employment space. The sites are:

1. **Covert Farm:** An LSIS site dominated by SEGRO distribution warehousing.
 - A non-designated site (Covert Farm Extension) sits adjacent to it. This site comprises smaller warehousing for airport-related uses.
2. **Southern Perimeter Road:** A non-designated site occupied by specialist commercial airport-related services providing cargo and servicing activity. This site sits to the southern boundary of Heathrow airport.
3. **Hatton Cross Area:** A non-designated site dominated by British Airway's operations to the east of Heathrow. It includes listed offices and hangers.
4. **South of Bath Road:** A non-designated site positioned along the northern Heathrow airport boundary. This site is dominated by small, single storey warehousing and car rental activities.
5. **North of Bath Road:** A non-designated site that comprises two smaller sub-sites separated by a field. Both sites are well-utilised but are mixed-use. The western area is primarily industrial in nature, whereas the eastern area has hotel, office and some industrial uses.
6. **North of Colnbrook By-Pass:** This non-designated site comprises two smaller sub-sites separated by an Immigration Detention Centre and Sheraton Hotel. The northern sub-site hosts a data centre and the southern sub-site has low density warehousing with airport-related services.

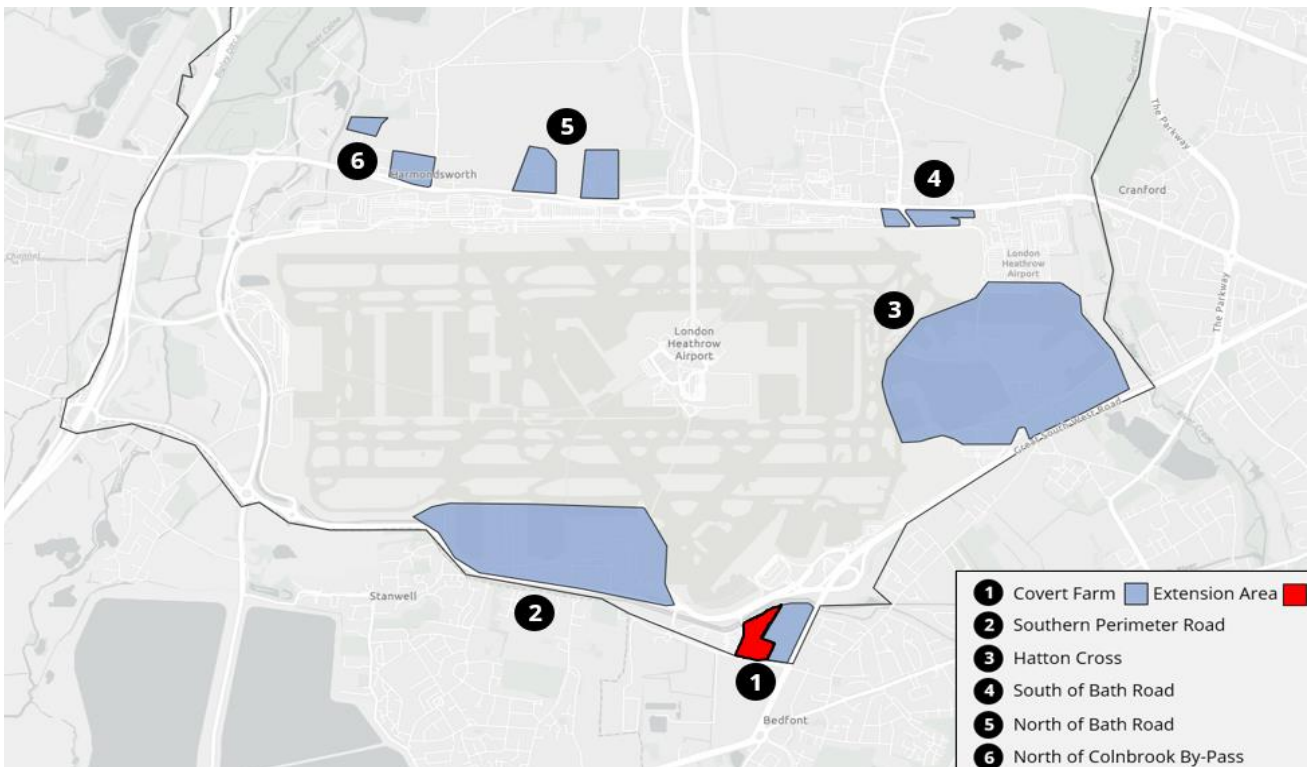


Figure 27: Cluster A: Heathrow Sites

Source: LBH and Avison Young, 2023

5.14 Across the seven sites four offer 'availability' primarily in the form of re-development or extension. These include:

- **Covert Farm Extension:** There is limited opportunity for intensification within the Covert Farm Extension area itself, however there is an adjacent car park that could be included within this employment site boundary. This car park has not been operational since 2017 and remains vacant providing an opportunity for new industrial type development that supports airport related uses. Outside the site boundary to the

south is a large pocket of vacant land, though this is a designated greenbelt site and is outside the borough boundary.

- **North of Bath Road:** There is limited opportunity for intensification across the western part of site as it is well occupied, but there are opportunities on the eastern site. While part of the eastern site is well-used for warehousing and a data stock, the office area faces vacancy challenges, has ample parking and land is relatively inefficiently used.
- **North of Colnbrook By-pass:** The site is well-maintained and offers limited potential for intensification but does have some industrial and light industrial vacancy which poses an opportunity for re-evaluation of those uses to provide an offer that better meets demand from airport related uses or data centres.
- **South of Bath Road:** The site is dominated by surface level car parking to support car rental activity. Parking could be consolidated into a multi-storey use to unlock space for other employment uses as has been done on neighbouring sites.

- 5.15 The remaining two sites, Hatton Cross and Southern Perimeter Road, have some limited 'availability' but occupation and spatial efficiencies are relatively strong. While intensification looks feasible on initial inspection, many occupiers on these sites require low density build configurations and open space to function which limits the opportunity. The sites also have some restrictions levied by Heathrow Airport to support its functionality around the runway.
- 5.16 While there are caveats to 'availability' on the sites, all have been assessed for their 'suitability' to support continued employment use as set out in Table 34. This has been informed by detailed site-based analysis as set out in Annex 1. This assessment shows that the areas with the highest 'employment quality scores' are Covert Farm, Covert Farm Extension and Hatton Cross. It is worth noting that Covert Farm Extension scores almost as highly as Covert Farm as the extension and LSIS area are effectively a single site.
- 5.17 The Covert Farm Site provides an excellent location for distribution activity. It is well-occupied, has relatively new build stock, boasts excellent access to the strategic road network and is adjacent to Heathrow Airport. It benefits from good connectivity to the London Underground being an eight minute (0.4 mile) walk to Heathrow Terminal 4 Station, which is served by both the Piccadilly and Elizabeth Lines.
- 5.18 Similarly, Hatton Cross provides good access to the strategic road network, has excellent public transport accessibility and is well occupied. It also scores highly as it is a unique employment site set within the airport boundary that would be difficult to re-provide elsewhere to serve the airport-related uses/activities it hosts.
- 5.19 The Southern Perimeter Road site also has a good 'employment quality score' as it has similar characteristics to Hatton Cross in terms of its unique proximity to Heathrow Airport. The site has excellent connections to the strategic road network and supports distribution and cargo activity. Its slightly lower score is linked to its older building stock and its position slightly further away from a station.
- 5.20 All of these sites do, however, score poorly on their proximity to and provision of amenities. The nearest amenities are within Heathrow, accessed through Heathrow Terminal 4 Station. There are several hotels nearby which have cafés and restaurants at ground floor, and therefore contribute to this provision, but they are quite closed off and inward facing. Although the distance to many of these amenities is relatively low, the road infrastructure does not support easy and safe pedestrian movement.
- 5.21 Hatton Cross's score is also negatively impacted because, unlike Covert Farm, most buildings are relatively old with the average build completion date being 1984. This links to the heritage buildings on site, but it does raise an important consideration of how these will continue to fair against MEES and EPC requirements for commercial properties in the future.

Table 34: Suitability Assessment for Cluster A: Heathrow Sites

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Policy Alignment	Average Score
Covert Farm	8	Industrial	Green	Green	Red	Orange	Green	Green	Green	Green	Green	4.1
Covert Farm Ext.	4	Industrial	Green	Green	Red	Orange	Green	Green	Green	Green	Green	4.0
Hatton Cross Area	121	Industrial	Green	Orange	Red	Green	Orange	Green	Green	Green	Green	3.8
Southern Perimeter Road	74	Industrial	Green	Orange	Red	Green	Green	Orange	Green	Green	Green	3.8
South of Bath Road	5	Industrial	Orange	Orange	Orange	Green	Orange	Green	Green	Green	Green	3.6
North of Bath Road	8	Industrial	Orange	Green	Orange	Green	Orange	Green	Green	Orange	Green	3.7
North of Colnbrook By-Pass	7	Industrial	Orange	Red	Orange	Green	Green	Red	Green	Green	Green	3.2

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 1 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

5.22 While the remaining sites, South of Bath Road, North of Bath Road and North of Colnbrook By-Pass, have lower scores they all still have relatively 'good' scores and remain 'suitable' for continued employment usage and/or development activity. Their scores are negatively impacted by a range of factors including:

- Fairly poor connectivity to stations and amenities.
- Older building stock at South of Bath Road and North of Colnbrook By-Pass.
- Vacant building challenges at South of Bath Road and North of Bath Road.

5.23 In terms of future uses, most sites are appropriate for 'lighter' general industrial uses (B2/EG(iii)) owing to their existing characteristics, accessibility and occupier base. 'Heavier' industrial and distribution uses (B8) are also suitable, but primarily for sites with good connectivity to the strategic road network such as Covert Farm, Covert Farm Extension, Southern Perimeter Road and North of Bath Road. While the ancillary and amenity offer is fairly poor across many sites, their relative isolation means that the provision of restaurants, cafes and leisure uses is unlikely to be suitable as footfall would be minimal and solely driven by the existing businesses.

5.24 In terms of specific sites:

- Hatton Cross' position within Heathrow Airport and its proximity to the runways limits the types of uses that can come forward other than what is currently present (i.e. British Airways operations).
- North of Bath Road is mixed-use in its nature with a hotel, offices, distribution and lighter industrial uses present, as well as a data centre. The office configuration on the eastern part of this site could be redefined given there are vacancy challenges and the locational characteristics of the area are more suitable for more industrial-type employment generating uses.
- North of Colnbrook By-Pass's location and characteristics suit its mixed-use nature. In the future, retention of 'lighter' general industrial uses would be suitable whereas distribution and heavy industrial uses (B8) are unlikely to be appropriate due to the proximity of residential uses. Any office activity in this location should be ancillary, owing to the lack of amenities and poor public transport connectivity.

- 5.25 Using all the above as a basis, as well as a consideration of wider factors, an overarching recommendation has been made for each site based on what is both 'achievable' and suitable as set out in the table overleaf. All sites should remain employment sites, but there are opportunities to intensify, extend and/or re-orient Covert Farm, South of Bath Road and North of Bath Road.

Focus On: Potential Sites

There are several additional plots in and around the Heathrow Cluster that are currently being considered by external parties for development. Those known to LBH include:

- Vacant/underutilised car park associated with Raddison Blu Edwardian Hotel on Bath Road.
- Thistle Hotel Heathrow Terminal 5 on Bath Road.
- Cardinal Point vacant storage area on Bath Road.

These plots have not been included in the figures presented for the Heathrow Cluster as their proposed uses are not yet clear. We recommend LBH monitor these and other opportunities - if they come forward and present genuine employment opportunities the figures in this report should be updated accordingly.

Table 35: Recommendations for Cluster A: Heathrow

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Classification
Covert Farm	8	0	0	Covert Farm is well utilised, occupied and fit-for-purpose. Dominated by distribution activity due its proximity to the strategic road network and Heathrow Airport, the units across the site are likely to continue to be in high demand. Give the dominance of distribution use, and lack of vacant land, there are few opportunities for intensification or re-orientation so the site should be retained. There is one plot used for open storage that may be suitable for intensification.	Remain and Intensify
Covert Farm Ext.	4	1.05 ³⁹	0	The Covert Farm Extension takes into consideration the land to the immediate west of Covert Farm, which includes a small vacant car park. Benefitting from the same locational characteristics as Covert Farm the site remains suitable for industrial uses. Not included in the site, but adjacent, is a large car park which is currently vacant. Owing to the prime suitability of this site for industrial activity, there is scope and opportunity to consider extending the employment site to cover this area and encourage it re-orientation to make better use of the car park.	Remain and Extend
Hatton Cross Area	121	2.05	0	Hatton Cross is dominated by British Airway's operations and benefits from excellent connectivity. Although it appears that there is some vacant land and underutilised space outside the hangers, there may be limited opportunities for re-orientation or intensification without impacting British Airway's operations. High security due to the runway proximity is another factor that will affect future delivery of new industrial floorspace in this site. It is therefore recommended that the site therefore is retained and protected for its existing use, but intensification by the landowner could be supported if proposals come forward. There is one site outside the airport boundary that presents an opportunity for intensification.	Remain and Intensify
Southern Perimeter Road	74	0	Warehouse: 1,070	The Southern Perimeter Road site is similar to Hatton Cross in that it is a unique site that sits within Heathrow Airport's boundary. It is relatively well utilised and dominated by cargo, freight and distribution activity. Unlike the other sites, however, the build stock is relatively old and there is some vacancy. Whilst these factors can typically signal an opportunity for re-configuration or even intensification, the likelihood is there may be build height restrictions and density impacts for new industrial development close to Heathrow's runways. As such it is recommended that the site is retained as it, with some opportunity for delivering more modern distribution and warehousing to replace units as they come to the end of their economic life.	Remain, some minor intensification opportunities but on restricted land
South of Bath Road	5	0	0	South of Bath Road is dominated by car rentals and is characterised by surface car parking. The site scores poorly in comparison to other sites in this cluster for building age, accessibility and amenity provision with some vacancies present as well. Owing to these factors, lighter industrial uses would be most suitable - particularly given the size of the site. Additionally, the internal road network is relatively 'tight' and would likely be unsuitable for HGVs and large vehicles normally associated with distribution and general industrial occupiers. Taking precedent from the multistorey rental car park structure run by Purple Parking next door, a similar solution could be explored here to release part of the site for redevelopment. Given strong value sets, intensification of this nature could be attractive.	Remain and Intensify
North of Bath Road	8	0	Office: 5,149	North of Bath Road comprises two sites with inherently different uses and activity. The western area, which benefits from a new distribution warehouse, is well occupied and most units are fit-for-purpose. There are no obvious opportunities for intensification, and it should be retained.	Remain and Reorient

³⁹ There is a large vacant car park to the west of the site, but sits outside its boundary, that has an additional 4.5Ha of vacant land. More information provided in the commentary.

				<p>The eastern area has mix of uses including a hotel and small office park. High vacancies within the office blocks, as well as inefficient existing spatial configurations, indicate that reconfiguration and re-orientation of the office provision in this location should be considered. Given the site is not an ideal location for office uses due to its poor public transport accessibility, it is not recommended that additional office floorspace is provided but rather alternative light industrial type employment uses that serve or link to activity at the airport. Note that the eastern subarea is relatively small and may not be suitable to support the delivery of larger distribution warehouses.</p>	
				<p>The site comprises two areas which are separated physically by a field. The northern subarea is occupied by a data centre and is well utilised with little scope for intensification and/or re-development. There may be an opportunity for a re-configured and more intense data centre, but there are challenges around power in the area which acts as a severe limitation.</p>	Remain
North of Colnbrook By-Pass	7	0	Warehouse: 3,182	<p>The southern area provides a mix of light industrial warehousing with airport related services. There are some industrial and light industrial vacancy challenges which poses an opportunity for re-evaluation of those uses to provide an offer that better meets demand from airport related uses or data centres. It is recommended that the site should be retained with the understanding that the market forces are likely to drive reprovision of the units in the long term to better meet occupier needs.</p>	

Cluster B: Hayes Corridor

5.26 The Hayes Corridor is located towards the centre of the borough and its sites are found in and around Hayes Industrial Area. It is close to the M4 and M25 and it benefits from rail connectivity via the Elizabeth Line as well as mainline rail services. The area incorporates three employment sites that have been appraised as part of this study which cover an area of over 154 Ha and provide c620,866 sqm of employment floorspace. The sites are:

1. **Packet Boat Lane:** A small LSIS site to the north west of Hayes Industrial Area that offers a mix of small-to-medium quality light industrial units.
2. **Hayes Industrial Area:** A large SIL to the south of Hayes which has eight distinct sub-areas:
 - Horton Industrial Estate (West): An industrial area to the west of the Hayes Industrial Area that offers a range of low-to-medium quality industrial units. The site is mainly occupied by warehouse and service units, although there are some manufacturing and commercial facilities.
 - Prologis Park Stockley Park (West): A new, modern and well-managed industrial area that offers a range of large high-quality warehouse units.
 - Iron Bridge Road (West): A thin portion of SIL located south of Stockley Park. Iron Bridge Road offers older light manufacturing and servicing units, as well as some vacant land.
 - Prologis Park Heathrow (South): A high-quality industrial area that offers large warehouse and distribution units for logistics occupiers. The site is closely connected to Heathrow airport via the nearest A-road.
 - Rigby Lane Industrial Area & Adler Industrial Estate (Centre): A well-utilised site towards the centre of the Hayes Industrial Area that offers a mix of industrial units that are used for logistics, wholesale, car sales and servicing uses among others.
 - Warnford Industrial Estate/Caxton Trading Estate (Centre): An industrial area in the centre of the site with medium-to-high-quality units. The site is occupied by warehouse and distribution units, with some servicing and wholesaler businesses.
 - Silverdale Industrial Estate & Pump Lane Industrial Estate (East): A site that hosts 'heavier' industrial activities that occupy a range of older industrial type units – though there are a small number of more modern industrial and office type units to the south of the site.
 - Springfield Road (North East): An industrial warehouse site which is well occupied. The site provides a range of medium quality industrial units, alongside a number of 'big box' retail uses.
3. **Mayfields Lake:** A medium sized undesignated site which incorporates several light industrial plots and a large car dealership. The site is located south west of Hayes Industrial Area, just off the M4 and the M25 but without a direct connection to either.



Figure 28: Cluster B: Hayes Sites

Source: LBH and Avison Young, 2023

- 5.27 While the three sites have different characteristics, Hayes Industrial Area offers the highest levels of 'availability'. Commentary is set out below:
- **Hayes Industrial Area:** The site is well utilised, but some areas could be better organised or utilised to unlock employment floorspace. There are also a small number of older and vacant industrial units that present opportunities for redevelopment. There have already been large redevelopment schemes across the area (e.g. Prologis Park Heathrow) demonstrating high levels of market appetite to invest in the area.
 - **Packet Boat Lane:** The site is well-utilised but there has been residential development leaving little room for expansion and/or intensification activity.
 - **Mayfields Lake:** The site is well-used but primarily for the open storage of cars, vehicles, materials and other goods. It may appear to have opportunities for intensification, but it is poorly connected to public transport and road network, and it is also a highly sensitive location as there are permanent and temporary residential uses located on the site limiting the potential for re-development and/or intensification. The site has grown incrementally, with some activity permitted through certificates of lawfulness and is therefore poorly organised with a lack of supporting infrastructure.
- 5.28 Despite there being limited 'availability' for the latter two sites, all have been assessed for their 'suitability' to support continued employment use as set out in Table 36. This has been informed by detailed site-based analysis as set out in Annex 1.
- 5.29 This assessment shows that the areas with the highest 'employment quality scores' are Hayes Industrial Area and Packet Boat Lane. While they are different in size, scale and focus, the types of uses each provide are generally suitable for the areas they sit in. Hayes Industrial Area, for example, is bound by the Elizabeth Line and A-roads which separates the industrial areas from conflicting uses. The industrial uses within Packet Boat Lane are located to the east of the Grand Union Canal away from the greenbelt and marina. Other factors also underpin the fact that they both remain 'suitable' for employment uses and/or future development:
- Hayes Industrial Area is generally easy to access by road from the M4 and rail via Hayes and West Drayton Stations – though it is important to note that accessibility does vary across the site due to its size. While some parts of the site have a poor amenity offer, those towards the centre also have access to the shops, cafes, restaurants and other services in Hayes Town. Its proximity to Heathrow is also a major locational advantage.
 - Packet Boat Lane is tucked away from most residential units, although its 'lighter' industrial nature makes it suitable for co-location. It suffers from poor connectivity but it remains well-occupied given it primarily serves a more local market - other industrial estates in the borough it has services that meet the day-to-day needs of residents (e.g. a gym, tool shop, carpet shop and furniture shop).
- 5.30 The South of Mayfield Lake site, in contrast, has a relatively low 'suitability' score. It is weak on all parameters but particularly regarding the following:
- Location and character – the site is relatively isolated and is not close to other industrial-type activities. The dominance of blue infrastructure in the area and potential associated flooding may also limit future development activity.
 - Strategic Road Connectivity – the site does not have direct access to the M4 despite its proximity to the A road. Instead, accessibility is via small country lanes which are shared with residential uses.
 - Vacant Land – there are pockets of vacant land which may indicate fairly low levels of demand. However, this may also be due to the proximity of Mayfields Lake and the flooding risks this presents.
 - Public Transport Accessibility and Amenities – there is poor to no public transport connectivity and/or amenities in the immediate and wider area.
 - Poor Build Stock – the properties on site are in poor condition and would not meet modern occupier standards/requirements.

- 5.31 Due to this it is therefore debatable whether it remains a 'suitable' employment site over the plan period, and is unlikely to offer any additional capacity suitable for meeting future needs.
- 5.32 Of the two 'suitable' sites, Packet Boat Lane suffers from poor accessibility and is over 20 minutes away from West Drayton Station by foot. This is also the case for parts of Hayes Industrial Area given its size – while some areas are close to Hayes and West Drayton stations, some are much further away. Parts of Hayes Industrial Area also suffer from poor road connectivity as some are interlinked with residential areas and some of roads have restricted access impacting its overall score.

Table 36: Suitability Assessment for Cluster B: Hayes Sites

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Policy Alignment	Average Score
Packet Boat Lane	4	Industrial	Orange	Red	Orange	Red	Green	Orange	Orange	Red	Green	3.2
Hayes Industrial Area	142	Industrial	Orange	Red	Red	Orange	Green	Orange	Orange	Orange	Green	3.2
Mayfields Lake	8	Industrial	Red	Red	Red	Red	Orange	Red	Red	Red	Red	1.9

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 1 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

- 5.33 In terms of future uses it is clear that the character, existing uses and current occupiers in the Hayes Industrial Area make it a suitable location for more industrious type uses including light industrial, industrial and larger warehousing type uses (i.e. B2/EG(iii)/B8). Most of these uses are already found across the site but the area lacks much in the way of ancillary cafes, restaurants, and leisure facilities which it could support in some areas given the density of people working on-site.
- 5.34 Packet Boat Lane remains more suitable for 'lighter' general industrial type uses (i.e. B2/EG(iii)) but given its proximity to residential, retail and leisure uses, as well as the Grand Union Canal, it is unlikely to be suitable for 'heavier' industrial or distribution type uses in the future. It may be a suitable location to explore workshop type uses to support the evolution of West Drayton's economy and improve the connection to the local high street.
- 5.35 Based on all the information analysed an overarching recommendation has been made for each site based on what is both 'achievable' and 'suitable'. As shown in Table 37 the only site that has been identified as having intensification opportunities is the Hayes Industrial Area, as it is the only one that present clear, obvious and potentially 'achievable' opportunities that could lead to an uplift in employment floorspace if intensified. Packet Boat Lane should be retained, but there is potential for Mayfields Lake to be excluded as a future employment site due to its poor 'suitability' for employment type uses.

Table 37: Recommendations for Cluster B: Hayes Sites

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floor-space by Use (SQM)	Commentary, including delivery challenges	Classification
Packet Boat Lane	4	0	Warehouse: 3,191	Packet Boat Lane is characterised by well-occupied industrial type properties that should be retained. There are few opportunities for intensification particularly as part of the site has already been re-developed for residential uses. Reconsidering some of the units towards the northern part of the site would be difficult due to the canal and wharf coming into the site.	Remain

Hayes Industrial Area is a large industrial area covering over 141 hectares of land. Each of the seven sub-areas within the industrial area are different in terms of their uses and typologies. Recommendations for each sub-area have been set out below based on their suitability and the best future uses for each.

- Horton Industrial Estate is a well-occupied industrial area to the west of the Hayes Industrial Area. The site is situated near West Drayton Station, and the Horton Road runs through the middle of the site. Connectivity is good with Horton Road linking directly with the A408 out towards the eastern part of the site. The types of activity across the site are well suited for its current environment and position close to a railway line.

In terms of the recommendations, there are clusters of lower quality and vacant units across the eastern part of the site around Horton Close. These present opportunities for re-development into more **intense** medium or larger industrial units, similar to the stock found towards the west of the site. Given there are proposals for a new large industrial unit in the north of the area (75221/APP/2022/2968), there is likely to be appetite to intensify areas of the site for this type of unit. Development of this nature would complement the units within the neighbouring Prologis Park – Stockley Park. Future uses across Horton Industrial Estate could include storage, distribution and manufacturing.

Intensify and Re-orient

Hayes Industrial Area	142	0	General Industrial: 6,785 Warehouse: 8,950
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- Prologis Park Stockley Park is a modern and well-managed industrial area that offers a range of large high-quality warehouse units. The site is well connected to the nearest A-road (A408), which runs south and connects to parts of the M4 and M25, and there is direct road connectivity to Heathrow Airport. The site is currently well-developed and occupied by data centres and new industrial warehouses currently under construction (39207/APP/2020/2188). It is recommended that the site should be **retained** as there are no clear opportunities to expand or improve the current industrial uses that have come forward.
- Iron Bridge Road is a small, thin portion of SIL located south of Stockley Park and bound by the railway. Iron Bridge Road offers older light manufacturing and servicing units, as well as pockets of underutilised land. As a whole the industrial units are of poor quality and there is narrow access for HGV vehicles from Prologis Park (Stockley Park). The site does present some opportunity for **intensification** given the vacant plots of land and there is opportunity for future re-development on the more dated stock within the site.
- Prologis Park Heathrow is also a high-quality industrial area that offers large warehouse and distribution units for logistics occupiers within easy reach of Heathrow. Given the quality of the units, location, and general high-quality environment it is recommended that the site **retained**. Prologis Park Heathrow is bound by residential developments to the east and west which makes it difficult to consider expansion.

- Rigby Lane Industrial Area & Adler Industrial Estate have a range of smaller servicing, warehouse, distribution, and manufacturing units. As a whole, the site is well occupied and should be **retained**, with some of the smaller, lower quality, and congested parts of the site having potential for some form of **intensification**. These include the plot occupied by Ainscough Cranes, which has recently had a planning application for intensification (63099/APP/2023/1608), and the Crossrail site to the west which is vacant following the opening of the line.
- Warnford Industrial Estate/Caxton Trading Estate is another well-utilised industrial area located towards the centre of the Hayes Industrial Area. The site is mainly occupied by warehouse and distribution units with some smaller servicing and wholesaler businesses. Given the site has limited space, coupled with strong occupancy, it is recommended that it should be **retained**. The only opportunity that might be suitable in the future is the re-development of more dated stock though this would be challenging over the short to medium term due to complex land ownership.
- Silverdale & Pump Lane Industrial Estate hosts ‘heavier’ industrial activities that occupy a range of older industrial type units. While the site suffers from small amounts of vacancy towards the northern part of the site, some of the larger units that were vacant are currently being refurbished including the Pasadena Centre. Given the rest of the site is performing well, and there is limited space for further development, it is recommended for **retention** rather than intensification.
- Springfield Road is located on the eastern side of the A312 and to the north west of Silverdale & Pump Lane Industrial Estate. It is well occupied and provides a range of medium-quality industrial units alongside a number of ‘big box’ retail uses. There are many different activities taking place within the site, such as food related activity (Reach Food Services) and creative production (West London Film Studios) within medium-sized warehouses. There are also some large distribution units towards the east of the site that are bound by the river. Given the site functions efficiently, and there are few opportunities for intensification, it is recommended that it is **retained**. There have recently been a couple of applications for re-development and/or co-location which should be considered in light of this conclusion (i.e. 1911/APP/2022/1853 and 2385/APP/2022/2952).

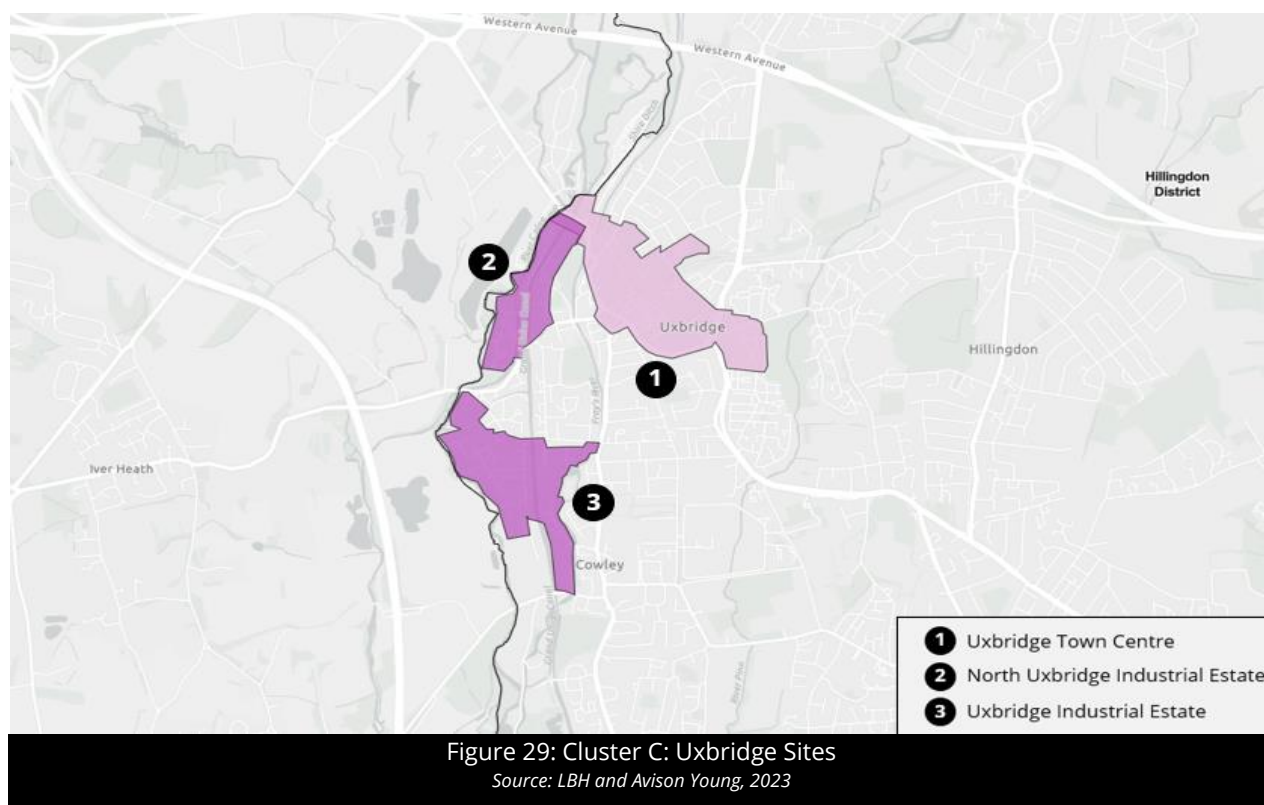
South of Mayfield Lake	8	0.25	Warehouse: 3,716	South of Mayfield Lake has poor quality stock, poor connectivity and suffers from high levels of flood risk making development complex. While the site could be better utilised, these limitations, alongside the presence of a significant number of temporary and permanent homes within the site, mean it is not ideally suited for future industrial intensification or as a designated employment site.	Exclude
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Source: Avison Young and CoStar, 2023

Cluster C: Uxbridge

5.36 The Uxbridge cluster is located to the west of the borough and its sites are found in and around Uxbridge Town Centre. It is within close proximity to both the M40 and M25, and it benefits from London Underground connectivity via the Piccadilly and Metropolitan Lines. The area incorporates three employment sites that have been appraised as part of this study which cover an area of over 106 Ha and provide c400,211 sqm of employment space. The sites are:

1. Uxbridge Town Centre: An Office Growth Location that incorporates a number of large floorplate office blocks.
2. North Uxbridge Industrial Estate: A modern SIL to the west of Uxbridge Town Centre that offers a mix of medium to high quality warehousing and office units.
3. Uxbridge Industrial Estate: A large SIL to the south of Uxbridge Town Centre which has three distinct sub-areas:
 - Uxbridge Trading Estate (East): A modern and well-managed industrial area that offers a range of higher quality industrial and storage type units.
 - Uxbridge Industrial Estate (West): A traditional industrial area that hosts 'dirtier' industrial activities⁴⁰ that generally occupy a broad range of older general industrial type units – though there are a small number of more modern industrial and office type units within the area.
 - Cowley Business Park (South): An out-of-town office park that suffers from high vacancy rates and a significant number of office to residential conversions.



5.37 While the three sites have very different characteristics, all offer some levels of 'availability' primarily in the form of re-development opportunities or the intensification of open yet active space. Commentary is set out below:

- North Uxbridge Industrial Estate: The site is well-developed and has had significant levels of re-development over the last decade leaving little room or need for development or intensification activity. There are, however, some large format office blocks available on the eastern side of the River Colne that

⁴⁰ Dirtier activities include those that generate noise, dust and pollution such as waste collection, waste processing and heavier and polluting manufacturing type activities.

could be re-oriented to better meet occupier demand, which are adjacent to a large vacant plot on Florence Way.

- Uxbridge Industrial Estate: There is much low-density activity across the site characterised by open storage type space (e.g. for cars, waste, equipment, vehicles etc) – this could be better organised to unlock employment floorspace. There are also high levels of vacant office space in the Cowley Business Park to the south of the area that could be adapted to better meet the requirements of modern occupiers.
- Uxbridge Town Centre: There are a significant number of opportunity sites across the town centre that present opportunities for mixed-use development. While re-development schemes may not need to provide additional office space, the buildings could be diversified to provide other employment uses and/or retrofitted to make them more attractive to modern office-type occupiers.

5.38 Due to this all sites have been assessed for their ‘suitability’ to support continued employment use and/or development as set out in Table 38. This has been informed by detailed site-based analysis as set out in Annex 1.

Table 38: Suitability Assessment for Cluster C: Uxbridge Sites

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Policy Alignment	Average Score
Uxbridge Town Centre	52	Office	Green	Orange	Green	Orange	Green	Red	Green	Green	Orange	3.6
North Uxbridge Industrial Estate	17.7	Industrial	Green	Green	Orange	Green	Orange	Red	Green	Green	Green	3.7
Uxbridge Industrial Estate	36.6	Industrial	Orange	Orange	Red	Red	Green	Orange	Red	Green	Orange	2.8

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2).

5.39 This assessment shows that the areas with the highest ‘employment quality scores’ are North Uxbridge Industrial Estate and Uxbridge Town Centre. While the two sites are very different, the types of uses each provide are generally suitable for the areas they sit in – the industrial parts of the North Uxbridge Industrial Estate, for example, are located to the west of the Grand Union Canal away from residential uses, and the offices in Uxbridge Town Centre complement the mixed-use nature of the area. Beyond this other factors underpin the fact that they both remain ‘suitable’ for employment uses:

- The North Uxbridge Industrial Estate has a number of modern and high-quality units and low levels of vacant land or buildings linked to relatively recent re-development activity.
- Uxbridge Town Centre, in contrast, scores highly due to its strong amenity offer and the presence of Uxbridge Underground station which provides connectivity to Central London and other nodes across West London (including Heathrow, Park Royal, Ealing, Acton, Hammersmith and Harrow). Some areas are more ‘suitable’ than others – for example those that are close to the amenities and public transport in the centre are more attractive to occupiers than those on the peripheries.

5.40 The area that the North Uxbridge Industrial Estate falls down on is its proximity to public transport. While it is accessible by private vehicle and benefits from a regular bus service, it is over 15 minutes away from Uxbridge Underground Station by foot and over 30 minutes away from the Elizabeth Line by bus. This is also the case for the Uxbridge Industrial Estate which has a lower ‘employment quality’ score than the other sites. It is even further from Uxbridge Underground Station so is even more inaccessible to those who do not have access to a vehicle. Other factors influencing Uxbridge Industrial Estate’s lower score include:

- The high levels of vacant office space and buildings on the Cowley Business Park to the south.

- The limited parking and restricted movement across the western part of the site due to poor maintenance and management.
 - The age and design of the units in the western part of the site which are overwhelmingly old and low quality.
- 5.41 Despite this lower score much of the Uxbridge Industrial Estate is well-occupied, productive and within close proximity to the strategic road network so remains 'suitable' as an employment site and for future development. There is, however, a need to re-consider the role of the Cowley Business Park due to high levels of vacancy and residential conversions.
- 5.42 In terms of future uses, it is clear that the character, existing uses and current occupiers on both the North Uxbridge Industrial Estate and Uxbridge Industrial Estate make them suitable for more industrious type uses including general industrial uses (i.e. B2/EG(iii)) and 'lighter' storage and distribution type activities (B8) that do not require regular Heavy Goods Vehicle movements. Ancillary office space, cafes and restaurants are also suitable but not as the predominant use.
- 5.43 Uxbridge town centre is different – while it remains suitable for some office uses (EG(i)/(ii)), high vacancy rates indicate that there is a need to diversify and re-orient the existing stock to better serve the town centre. This could involve a multi-pronged approach, including:
- Enhancing the quality and flexibility of existing office stock to increase attractiveness to occupiers.
 - Exploring other 'B-class' employment uses that might be suitable to support the evolution of the town centre's economy (e.g. 'light' industrial, workshop and workspace type uses).
 - Investigating opportunities for other non-residential uses that are typically found in sustainable town centre locations (e.g. hotel, leisure, health uses).
 - Subject to accommodating the above, residential-led mixed use schemes in suitable locations.
- 5.44 These options are being explored as part of the ongoing *Uxbridge Masterplan* which could define which areas are most 'suitable' for continued employment use and where selective release might be appropriate to support the borough's housing targets. It is also worth noting that, alongside Stockley Park, Uxbridge Town Centre remains the most 'suitable' office location in the borough so could be an area that any displaced occupiers from less suitable office areas could be supported to relocate to (e.g. from Cowley Business Park and Salamander Quays).
- 5.45 Using all the above as a basis an overarching recommendation has been made for each site based on what is both 'achievable' and suitable. As shown in Table 39 the only site that has been identified as having intensification opportunities is the Uxbridge Industrial Estate as this is the only one that present clear, obvious and potentially 'achievable' sites that could lead to a significant uplift in employment floorspace if intensified. The North Uxbridge Industrial Estate should remain an employment site, but like Uxbridge Town Centre there is a need to re-think and potentially re-orient the existing office offer given the high levels of vacancy and recent conversions of office space to residential.

Table 39: Recommendations for Cluster C: Uxbridge Sites

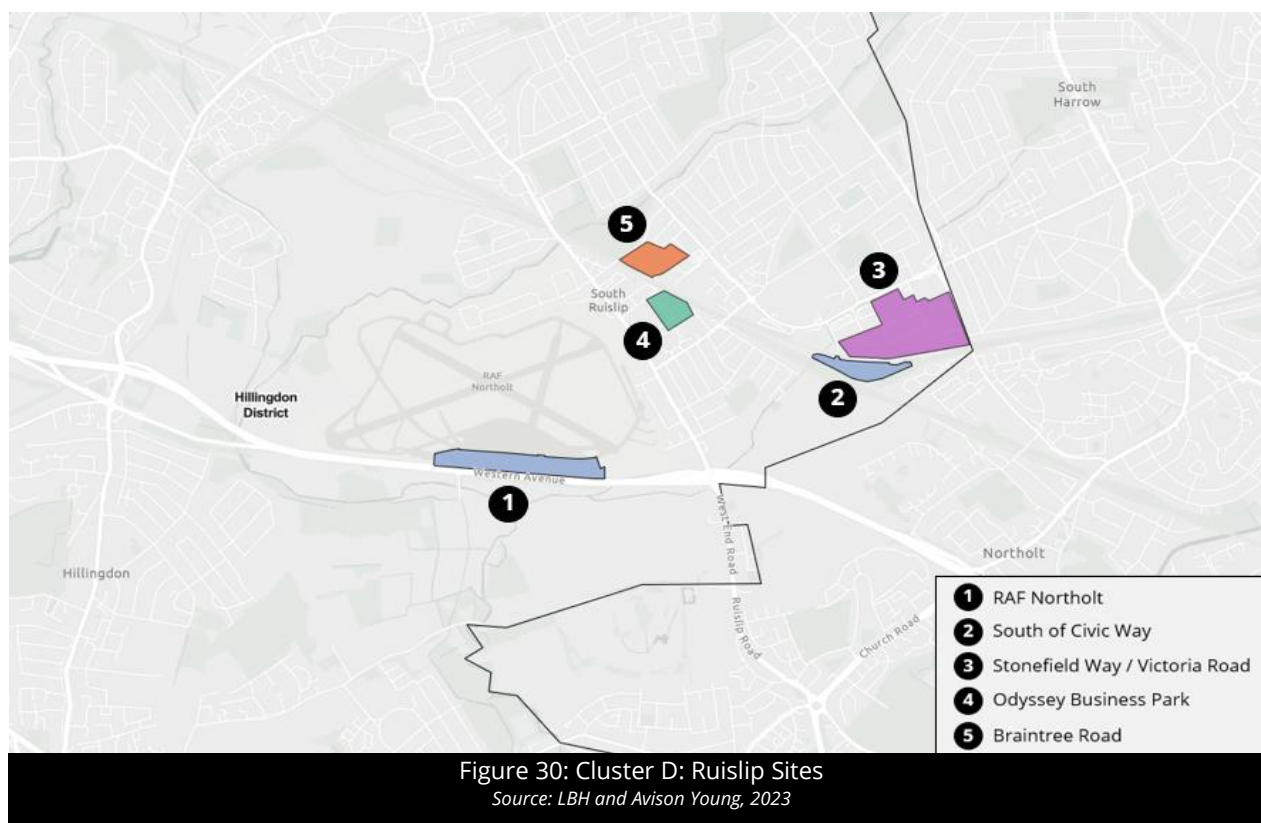
Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorpace by Use (SQM)	Commentary, including delivery challenges	Classification
North Uxbridge Industrial Estate	17.7	0.74	Office: 2,290 Warehouse: 4,020	<p>Most of the North Uxbridge Industrial Estate is home to modern and well-occupied industrial type properties that should be retained. There are few opportunities for intensification though a small number of plots could be better utilised, including the vacant Weir House though this is expected to come forward as residential despite the industrial nature of the surrounding environment. The most northern extremity of the site, which previously hosted Xerox, remains suitable for intensified industrial type uses but this is complicated by residential conversions impacting access, noise and pollution considerations. There is also a parcel of vacant land directly off Florence Way which has potential for redevelopment - The site currently has an application for a new industrial unit (Union Two).</p> <p>The office area to the south but on the east of the River Colne suffers from vacant space but it is has not yet been subject to conversions to other uses. There is an opportunity in this location to re-orient and re-position these uses to better meet occupier needs or to support other types of employment generating activities. Given the site's existing character general industrial uses are likely to be most suitable.</p>	Remain, Re-orient and Intensify
Uxbridge Industrial Estate	36.6	0	Office: 6,822 General Industrial: 572 Warehouse: 2,064	<p>There are parts of the Uxbridge Industrial Estate that present opportunities for re-development and intensification – most notably areas to the west of the Grand Union Canal. While nearly all plots are productively used in this portion of the site, bar the Arundel Road Car Park, many open storage spaces could be used more efficiently to unlock additional employment space. There are also a number of low-quality and old units that be configured better to realise stronger employment densities. This would be complex due to landownership and green belt constraints but could lead to a significant uplift in space particularly if combined with elements of the West London Industrial Park which sites outside the site boundary.</p> <p>As with parts of the North Uxbridge Industrial Estate there is a need to re-orient the Cowley Business Park to the south of the area. At present several blocks are being converted to residential uses, but the amenity offer is low as is connectivity making it less ideal for some use types. There may be an opportunity to consider other employment generating uses in this area and its characteristics and status do not lend it to be retained as part of the employment site.</p>	Intensify and Re-orient
Uxbridge Town Centre	52	0	Office: 52,229	<p>Uxbridge Town Centre has a large supply of older large floorplate office stock much of which is vacant and/or underutilised. Given future demand for employment space, and the locational advantages of the area, it is recommended that the site retains some protection but potentially not as an 'Office Growth Location'. It should remain as an important employment area but there are other niche typologies and employment generating uses that could better suit the area – some of which could be retrofitted into existing buildings. Defining the future potential of the town centre is beyond the scope of this study, but this is something that the ongoing <i>Uxbridge Town Centre Masterplan</i> can advise on taking steer from this study that there is a need to re-orient the existing offer and consider opportunities for co-location. It will also define the most appropriate areas to retain, re-orient, improve or release office space based on locational characteristics and demand trends.</p>	Re-orient and Co-Locate

Source: Avison Young and CoStar, 2023

Cluster D: Ruislip

5.46 The Ruislip cluster is located towards the north east of the borough and its sites are found in and around South Ruislip. It is close to the A40 and is connected to the London Underground via the Central Line and National Rail. The area incorporates five employment sites that have been appraised as part of this study which cover an area of over 38 Ha and provide c103,729 sqm of employment space. The sites are:

1. **RAF Northolt:** An airfield site which incorporates several hangars, industrial units and airport related services within the site boundary. The site is located to the north of the A40, and to the west of South Ruislip Station.
2. **South of Civic Way:** A large waste facility, which is occupied by the West London Waste Authority, bound by the railway to the south.
3. **Stonefield Way / Victoria Way:** A medium sized SIL to the east of South Ruislip Station that offers a mix of medium to high-quality industrial units.
4. **Odyssey Business Park:** A business park located close to RAF Northolt and South Ruislip that offers a mix of medium-to-high-quality office units with ample parking.
5. **Braintree Road:** A small sized LSIS site with a wide range of small businesses located to the north east of RAF Northolt.



5.47 Across the five sites occupation and spatial efficiencies are relatively good. While all have very different characteristics in terms of industrial and office uses, Stonefield Way, Odyssey Business Park and RAF Northolt have most 'availability' in the form of re-development opportunities or the intensification of space. Commentary is set out below:

- **Stonefield Way:** The site is well-utilised and well-located, but a small amount of the industrial stock is older, low-density and vacant. This offers opportunities for re-development to provide units that are better suited to modern occupiers.
- **Odyssey Business Park:** Emerging vacancy challenges linked to its large-floorplate office offer indicates a level of 'availability' and a need to reconsider the future of the park.

- **RAF Northolt:** There is some ‘availability’ across RAF Northolt in the form of small pockets of vacant land which separate the A40 from the airport related uses (i.e. hangars, offices, and training facilities) within the site. These may present opportunities for commercial development though the space may be safeguarded for airport-related uses.
- **South of Civic Way:** The site is used as waste facility which is ‘space hungry’ and provides a fairly poor-quality surrounding environment. Any perceived ‘excess’ space is unlikely to be suitable for intensification or rationalisation to deliver new supply given it plays an important role in supporting waste management activities and vehicle movements.
- **Braintree Road:** The site is well maintained but offers limited ‘availability’ and potential for intensification. The site has industrial, light industrial and office units that are well-occupied – there could be small opportunity to re-evaluate the office stock and its associated parking.

5.48 Despite having mixed ‘availability’ all sites have been assessed for their ‘suitability’ to support continued employment use as set out in Table 40 below. This has been informed by detailed site-based analysis as set out in Annex 1.

5.49 This assessment shows that the areas with the highest ‘employment quality scores’, and are therefore the most ‘suitable’, are Stonefield Way / Victoria Road and Odyssey Business Park:

- Stonefield Way / Victoria Road provides a good location for industrial activity – it is reasonably well-occupied, has medium-to-high-quality stock, and is bound by the railway line from conflicting uses to the south. The site has many points of access and benefits from good connectivity to South Ruislip Station which is 0.8 miles away. It also scores highly due to its proximity to and provision of amenities – there are ‘big box’ retail units surrounding the north of the site, and a range of retail uses near South Ruislip Station.
- Odyssey Business Park to the west of Stonefield Way provides a range of high-quality office units. The business park is only 0.2 miles walk from South Ruislip Station and provides ample parking per unit. The site has two points of access with high levels of security at each entrance. The site is within close proximity to the large retail development to the east and amenities surrounding South Ruislip Station. Its score is, however, negatively impacted by emerging vacancy challenges.

Table 40: Suitability Assessment for Cluster D: Ruislip Sites

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Policy Alignment	Average Score
Stonefield Way / Victoria Way	17	Industrial	Orange	Green	Orange	Green	Green	Green	Green	Orange	Orange	3.7
Odyssey Business Park	3	Office	Orange	Green	Green	Green	Orange	Green	Green	Orange	Orange	3.8
Braintree Road	3	Industrial	Orange	Orange	Orange	Orange	Green	Green	Green	Red	Orange	3.2
RAF Northolt	11	Other	Red	Red	Red	Red	Green	Orange	Green	Red	Green	2.4
South of Civic Way	4	Other	Red	Green	Red	Red	Green	Green	Green	Orange	Green	3.2

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 1 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

5.50 Braintree Road, RAF Northolt and South of Civic Way have ‘lower’ scores but are generally ‘suitable’ for employment uses and/or development. Factors influencing their lower scores include:

- They all have access challenges compared to other employment sites and are constrained by limited parking.

- RAF Northolt suffers from a lack of amenities on site or in close proximity.
- Braintree Road and South of Civic Way are fairly close to the A40 but vehicles have to travel through busy and residential areas to access it.

- 5.51 In terms of future uses it is clear that the character, existing uses and current occupiers on Stonefield Way / Victoria Road and Braintree Road make them suitable for more industrious type uses including general industrial (i.e. B2/EG(iii)) and 'lighter' storage units (i.e. B8), as well as possible ancillary office space, cafes and restaurants.
- 5.52 Odyssey Business Park remains suitable for office-type space (i.e. EG(i)/(ii)), but emerging vacancy challenges indicate that there may be a need to diversify and re-orient the existing stock in the future to consider other types of non-residential uses such as workspace. The site may also be suitable for 'lighter' industrial and workshop type uses to support the evolution of the local economy though viability may be a challenge. 'Heavier' industrial or distribution uses are unlikely to be suitable as access will be a constraint for large vehicles – it will be challenging to change this as land to the west of the site's access road is safeguarded for RAF Northolt.
- 5.53 RAF Northolt and South of Civic Way both remain suitable for their current uses but there are few opportunities for diversification given their distinct and important functions.
- 5.54 Using all the above as a basis, as well as a consideration of wider factors, a recommendation has been made for each site. As shown in Table 41 the only sites that have been identified as having intensification or re-orientation opportunities are Stonefield Way / Victoria Road and Odyssey Business Park. RAF Northolt, Braintree Road, and South of Civic Way should all remain in their current form, though proposals for intensification should be considered.

Table 41: Recommendations for Cluster D: Ruislip Sites

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Classification
Stonefield Way / Victoria Way	17	0	Warehouse: 422	Large areas of Stonefield Way / Victoria Way are home to modern and well-occupied industrial type properties that should be retained. There are few opportunities for intensification, though a small number of plots could be better utilised where stock is old, single-storey and/or vacant. Central parts of the site have already seen some levels of permitted industrial development activity and do not require intensification or re-evaluation.	Remain and Intensify
Odyssey Business Park	3	0	Office: 3,331	The emerging vacancy challenges at Odyssey Business Park suggest that demand is challenging. Whilst the office units are in relatively good condition, the blocks in their current configuration are unlikely to attract occupiers as their preferences change. It is therefore recommended the site is 're-oriented' to better meet commercial demand. This could involve splitting up existing units to provide smaller and more flexible arrangements. Alternative uses within its existing Use Class E could also be considered, however some of these may not be appropriate due to the noise implications of being located under the runway approach.	Re-orient
Braintree Road, South Ruislip	3	0	0	Braintree Road is situated within a residential development and is bound by a railway line to the south. The current uses are mainly light industrial in nature and provide space for local businesses. As the site is functioning well, densely developed, and performs an important local economic function it is recommended that it is retained in its current form. Given the stock is fairly dated, there could be some potential for re-development and intensification of some of the smaller units in the future though complex ownership and viability challenges constrain this opportunity.	Remain and Intensify
RAF Northolt	11	0.39	0	RAF Northolt is a fit-for-purpose site that supports activity on the airport. It is recommended for retention given its current role, but given the age of some units there could be potential to enhance and intensify some of the buildings in the future. There are also small pockets of vacant land within the site that could hold potential for future development, though these have not been put forward for intensification as part of this study as they may be safeguarded for airport related uses, and there will be security challenges if employment uses that are not related to activity at the airport are introduced.	Remain, limited intensification opportunities but on restricted site
South of Civic Way	4	0	0	South of Civic Way is a well utilised site that supports heavier industrial activities, primarily waste activities. Although the build stock is relatively dated, the majority of the industrial site is occupied and plays an important role in supporting London's population. Given the nature of this employment site, the opportunity for intensification is limited so it is recommended for retention in its current form.	Remain

Source: Avison Young and CoStar, 2023

Cluster E: North Hillingdon

- 5.55 The North Hillingdon cluster is situated to the north west of the borough with sites in and around Harefield. Connectivity is relatively poor, with the M25 some distance to the west, and there is no rail connectivity close to employment sites.
- 5.56 The cluster comprises two distinct employment sites that have been appraised as part of this study which cover an area of over 11 Ha and provide c.10,673 sqm of built employment space - though it is important to note that much activity is undertaken on open yards and other uncovered/undeveloped land in this location. The sites are:
- **Newyears Green Lane:** A non-designated site that comprises a range of different 'bad neighbour' facilities, including waste-management, recycling facilities and some smaller warehousing.
 - **Summerhouse Lane / Salamander Quay:** Two small self-contained sites designated as a single LSEL. Both sites are in remote locations and surrounded by greenbelt and/or residential dwellings. Summerhouse Lane to the north has well-occupied office space and light industrial units. Salamander Quay to south has larger office units with a good provision of surface parking within the site.

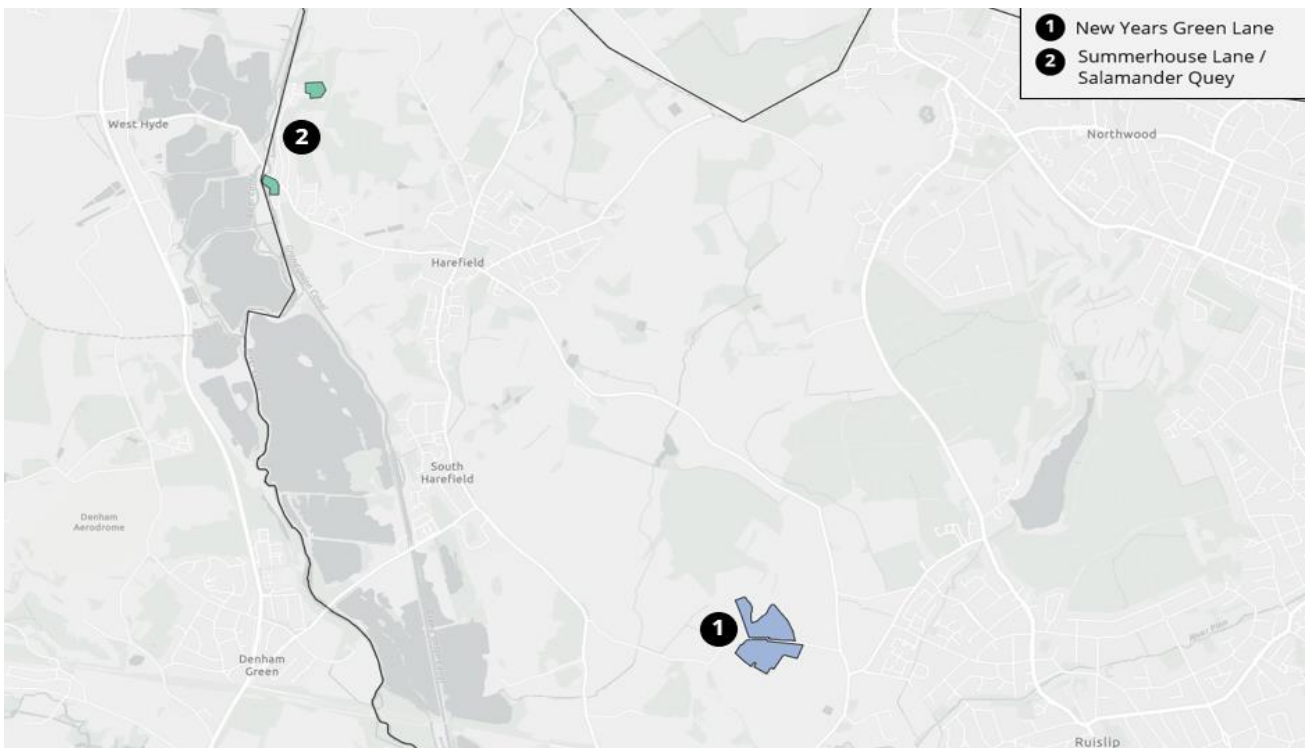


Figure 31: Cluster E: North Hillingdon

Source: LBH and Avison Young, 2023

- 5.57 In terms of 'availability', most businesses on the Newyears Green Lane site require low density build configurations and open space as they primarily undertake recycling and waste activities which are 'space hungry'. This means intensification and/or redevelopment potential is limited as is 'availability'. The site is also relatively isolated, with poor accessibility to the strategic road network meaning only a handful of industrious occupiers would consider it an attractive location.
- 5.58 In terms of Summerhouse Lane / Salamander Quay, Salamander Quay, which comprises low-rise purpose built office blocks has some vacant floorspace and therefore 'availability'. This may present an opportunity to rationalise the existing units and deliver a different offer to re-orient employment activity in this location. Summerhouse Lane is well-occupied, well-developed and has less 'availability'.

5.59 Despite having mixed ‘availability’, both sites have been assessed for their ‘suitability’ to support continued employment use as set out in Table 42. This has been informed by detailed site-based analysis as set out in Annex 1.

5.60 This assessment shows that both sites have a similar ‘employment quality scores’, even though they are inherently different in nature and character. Breaking this down:

- Newyears Green Lane is an active industrial site that has a relatively low score in comparison to other industrial locations across Hillingdon. This is because its buildings, amenity offer, accessibility and links to the strategic road network are relatively poor. Even though this is the case, the waste-management and recycling activities taking place on site are important and is likely to be ‘tied’ to this location through expensive location-specific licenses. It is also often difficult to relocate these uses elsewhere due to the noise, smell and vehicle traffic associated with them. Due to this, although the site does not have a high score, it is fit-for-purpose and ‘suitable’ in its current state for continued employment use but not for future development.
- The Summerhouse Lane / Salamander Quays site has a lower score due to its limited public transport connectivity, poor amenity offer, proximity of residential uses and, crucially, potential future vacancy challenges. Salamander Quays, in particular, has units that are targeted at larger office occupiers and, as identified in preceding chapters of this report, the future need for offices of this nature is limited. There could an opportunity to refurbish these buildings to meet modern occupier demand, but the likelihood is that the isolated nature of the site would limit the opportunity and its ‘suitability’ for office uses. It may be sensible to therefore consider a different future for this site and to consolidate and focus office activity into more appropriate locations such as Uxbridge Town Centre. While Summerhouse Lane has the same locational challenges, it remains more ‘suitable’ as an employment site as it has a mix of more modern and smaller scale office and light industrial uses that are currently well-occupied and appear to be in demand.

Table 42: Suitability Assessment for Cluster E: North Hillingdon

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Policy Alignment	Average Score
Summerhouse Lane / Salamander Quay	0.841	Office	Red	Orange	Red	Orange	Green	Orange	Red	Red	Green	2.8
Newyears Green Lane	10	Industrial	Orange	Orange	Red	Orange	Green	Orange	Red	Red	Green	3.1

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 1 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

5.61 In terms of future uses, Newyears Green Lane will continue to be suitable for the activities currently undertaken on site. The isolated nature of this site and distance from the strategic road network is unlikely to make it an attractive location for most occupiers. Summerhouse Lane / Salamander Quay is technically ‘suitable’ for offices, workspace and amenity uses but given its isolated location is likely to be challenging to attract occupiers for future office-based developments. It may therefore need to be re-oriented to provide different types of uses in the future.

- 5.62 Using all the above as a basis, as well as a consideration of wider factors, an overarching recommendation has been made for each site. As shown in Table 43, Newyears Green Lane should remain an employment site due to the fact that it remains well utilised, occupied, and is a much-needed industrial location for the activities currently present.
- 5.63 Due to the inherently different offer within Summerhouse Lane / Salamander Quay, there are two future opportunities for the site, split by the two sub areas. The Summerhouse part of the site is well occupied and provides a strong mix of light industrial and office uses and should therefore remain as it is. For Salamander Quay, the rising vacancies and relative unattractiveness of the site as a larger floorplate office location signals the need to reconsider the offer.
- 5.64 As with the Heathrow Cluster it is worth noting that there are other sites in and around the area that are currently being considered by external parties for development. The main one is the Merck Sharpe Dohme (MSD) site on Breakspear Road South which is expected to come forward for employment development.

Table 43: Recommendations for Cluster E: North Hillingdon

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Classification
Summerhouse Lane / Salamander Quay	0.841	N/A	Office: 601	<p>Summerhouse Lane / Salamander Quay should be considered as two separate sub areas due to the inherently different offers they present.</p> <ol style="list-style-type: none"> 1. Summerhouse Lane is well occupied and provides a good mix of both light industrial and office units, which appear to be in fair condition. Whilst it is recognised that the site is relatively isolated, with few amenities and poor public transport accessibility, and would not typically score highly as an employment location, its occupancy suggests that it is to some extent fit-for-purpose and 'suitable'. It is therefore recommended for retention in its current form. 2. In comparison, Salamander Quay provides larger floorplate office units with some vacancies suggesting that demand is weakening. It is therefore recommended that the site is no longer classified as an Office Cluster, but progressively diversified to allow other 'B-class' or non 'B-Class' employment uses to come forward as vacancies become a significant challenge. In line with Summerhouse Lane, potential smaller light industrial uses could be considered to service North Hillingdon. 	<ol style="list-style-type: none"> 1. Remain 2. Re-orient
Newyears Greenlane	10	N/A	N/A	<p>Newyears Green Lane is a well utilised site that serves heavier industrial uses, including waste and recycling activities. Although the build stock is relatively dated most of the site is occupied with large swathes of yard space used for open storage. This is an important, and much required, aspect of the site as a whole for occupiers.</p> <p>Given the isolated nature of this site, the opportunity for intensification is limited as there is likely to be limited additional demand above and beyond the present occupiers. The presence of the car dealership forming part of the offer on the western extent of the site demonstrates this.</p> <p>Given the nature of the occupiers present, characteristics of the location and resultant limited future demand, the site is recommended for retention in its current form.</p>	Remain

Cluster F: Stockley Park 'Office Area'

- 5.65 Stockley Park is a well-known business park towards the south of the borough within a ten-minute drive of Heathrow. It has a traditional out-of-town office park character and was opened in 1986 making it the oldest of its type in the country. This status, alongside its high-quality and well-maintained landscaping, has been recognised by Historic England who have added it to their Register of Parks and Gardens of Special Historic Interest. While there have been some high-profile departures in recent years, the Park is still home to a collection of recognised occupiers including Apple, Hasbro, Canon, IMG Studios and Sharp Electronics.
- 5.66 As set out in Table 44 the cluster's 'employment quality score' is not as high as might be expected for such a prominent and well-known location. While it remains a 'suitable' employment location, benefitting from a high-quality landscape, ample parking and its proximity to the M25, its score is negatively impacted as it has relatively high vacancy rates. It is estimated that around 59,791 sqm of space is currently available which is around 40% of total floorspace. This is a major challenge for the Park and it is likely to link to the fact that its 'offer' does not reflect changing occupier requirements – it remains traditional and many buildings are approaching 40 years of age meaning they do not reflect modern expectations or environmental standards.
- 5.67 This challenge is highlighted on the map below which illustrates the highest levels of availability are found within the oldest buildings. The buildings that have been refurbished in recent years have lower levels of vacancy as they better respond to the needs of modern occupiers – though it should be noted that some 'modern' buildings still face vacancy challenges. Other challenges to attracting occupiers to the area include its distance to a station, Hayes Station is over 1.3 miles from the centre of the Park via a fairly unattractive walking route, and the relatively low-quality amenities offered by the Arena.
- 5.68 Whilst there are some areas where the offer could be improved, such as the diversity of the food and drink offer at the Arena, it is the structural challenges that appear to be influencing demand rather than a lack of investment in place management or activation. The management company has made significant investments in the quality of the environment to make the area as attractive as possible to occupiers (e.g. through the provision of landscaped gardens, exercise equipment, bicycles, subsidised bus services, meeting pods, security and trim trails) and has enabled a higher quality café within The Square.
- 5.69 Fundamentally the office market is changing and business parks across the country that do not have a strong sector focus are struggling to attract occupiers. While there may be continued demand for office space in Hillingdon in the future this will only be for attractive space with a strong supporting offer. Other use types are likely to have higher levels of demand for the foreseeable future and there may be opportunities to diversify the current offer at the Park to address vacancy challenges and enhance the area as an office destination.
- 5.70 Due to this it is recommended that the site is retained as an employment location but re-oriented to provide a more diverse and varied offer that meets the demands of modern-day occupiers. This will need to be carefully planned given the Park's history, status and designations. It is therefore recommended that the future vision and function of the Park is developed by both LBH and existing landowners via a masterplanning process which focuses primarily on land use, design and landscape considerations. This should identify what broad parameters are acceptable for the future of the Park to guide the investments of freeholders, and it should be developed in a way to inform the Local Plan.

Table 44: Suitability Assessment for Cluster F: Stockley Park ‘Office Area’

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Policy Alignment	Average Score
Stockley Park Office Area		Office	Green	Orange	Green	Green	Red	Red	Green	Green	Green	3.4

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 1 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

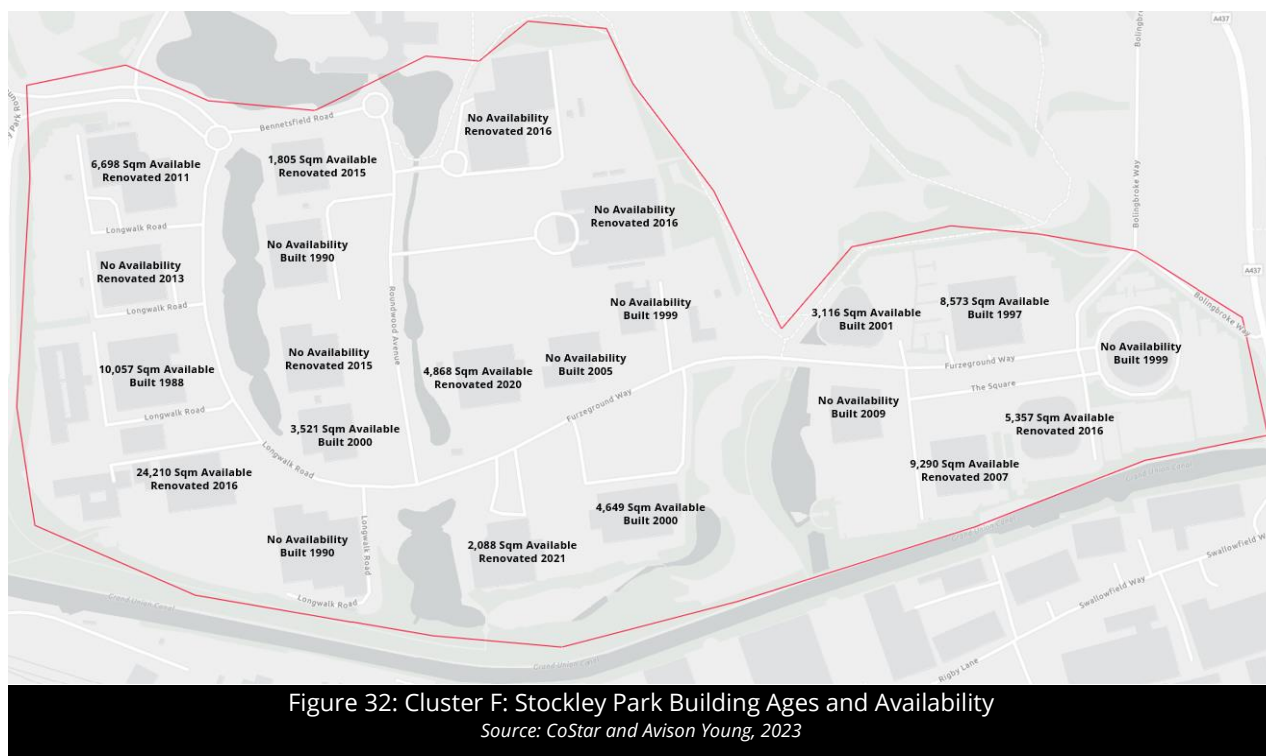


Figure 32: Cluster F: Stockley Park Building Ages and Availability
Source: CoStar and Avison Young, 2023

Current Availability and Future Supply

5.71 Information presented in this chapter illustrates that across the five clusters there is some existing supply available that will help satisfy a portion of future demand. As of mid-2023 there are 75 properties available with a total floorspace of 164,185 sqm (see Appendix 1). By use class this equates to:

- 47 office (EG(i)/(ii)) properties, totalling c.130,213 sqm of available floorspace.
- 6 general industrial (B2/EG(iii)) properties, totalling c.7,357 sqm of available floorspace.
- 22 warehousing & distribution (B8) properties, totalling c.26,615 sqm of available floorspace.

5.72 There is also some current availability in other parts of the borough. According to CoStar (2023) this totals to⁴¹:

- 60,441 sqm of available office (EG(i)/(ii)) floorspace.
- 11,348 sqm of available general industrial (B2/EG(iii)) floorspace.
- 5,973 sqm of available warehousing (B8) floorspace.

⁴¹ These figures do not include units classified as being ‘under construction’. These units are considered later in this chapter.

- 5.73 The availability of office space (EG(i)/(ii)) across the borough may meet some future demand given the quantum available. There are, however, limitations with much of the stock that is available influencing its suitability and attractiveness for future occupation. For example, some available office space is:
- In poorly connected and areas that are not particularly attractive to occupiers (e.g., at Cowley Business Park).
 - In low-quality buildings that are not appealing to most modern occupiers, particularly those looking to consolidate their portfolios following the rise of hybrid working (e.g., Salamander Quay).
 - In in a traditional large floorplate format which is less desirable to modern occupiers who are increasingly looking for smaller and flexible offices spaces (e.g., Odyssey Business Park).
- 5.74 The availability of general industrial (B2/EG(iii)) and warehousing (B8) floorspace may also help to meet some demand but it is likely to be insufficient to meet all demand, particularly given much vacant stock is likely to be unattractive to occupiers in its current form and is therefore unlikely to be re-used without some form of investment or reconfiguration.
- 5.75 Looking to the future, the borough's development pipeline could further impact employment floorspace supply and availability. As shown in Table 45 below, which draws on mid-2023 data from LBH, it is evident that there are a total of 48 unimplemented or in progress planning permissions for office (EG(i)/(ii)), general industrial (B2/EG(iii)) and warehousing & distribution (B8) properties in the borough which, if implemented in full, could reduce overall employment floorspace by -68,563 sqm.
- 5.76 Broken down by use class, this activity could deliver +25,414 sqm of warehousing (B8) floorspace which is counter-balanced by the expected loss of -24,480 sqm of general industrial space (B2/EG(iii)) and a net reduction of -69,497 sqm of office space if fully implemented.

Table 45: Extant Planning Permissions in Hillingdon (SQM) (2023)

Office (EG(i)/(ii))	General Industrial (B2/EG(iii))	Warehousing (B8)	Total
-69,497	-24,480	+25,414	-68,563

Source: LBH, 2023

6. Future Requirements: Considering Current and Future Employment Space Requirements

Chapter Summary

This chapter sets out the spatial typologies that currently exist across employment areas in Hillingdon as well as proposed 'intensified' Hillingdon-specific employment typologies that have the potential to deliver an uplift in floorspace.

The premise behind developing typologies for industrial intensification is that Hillingdon's industrial areas are expected to continue to experience high demand as well as pressures from residential development and other high-value uses over the refreshed *Local Plan* period. Existing employment areas are typically physically constrained and accommodating growth will require optimisation of land and a coordinated approach to new development that can achieve efficiencies through stacking, co-location and servicing.

This section first sets out the spatial characteristics and operational considerations of existing employment typologies in Hillingdon followed by opportunities within the borough for intensification, considering both growth sectors and location-based opportunities. The existing typologies are then considered alongside best practice examples of employment uses to inform the development of a set of design criteria for intensification.

Based on existing Hillingdon typologies, location opportunities, sector demand and best-practice design criteria, Hillingdon-specific typologies are then set out. The table below summarises the six typologies and their key characteristics. These typologies provide a means of assessing intensification potential across employment areas within Hillingdon as set out in the following chapter which explores future capacity for sites identified as having potential for intensification.

	Sectors	Unit types	Plot ratio (net)*	Typology overview
Hillingdon Typology				
Typology A.1 Horizontal S light industry	Manufacturing, wholesale, specialised construction	S	100-150%	Small-scale, ground dependent industrial units with shared service yard
Typology A.2 Vertical S/M light industry	Manufacturing, wholesale, specialised construction	S/M	200-300%	Small-medium units stacked vertically accessed via goods lifts
Typology B.1 Horizontal L/XL light industry	Distribution, storage, wholesale, bix-box retail	L/XL	100-120%	A group of small, stackable units attached to a large footprint, ground-dependent unit
Typology B.2 Stacked, S/M/L light industry	Distribution, storage, wholesale, bix-box retail, manufacturing, specialised construction	S/M/L	150-200%	A large format, light-industrial warehouse typology stacked with smaller units accessed via LGVs
Typology C.1 S-M horizontal yard dependent	Specialised construction, manufacturing, wholesale	S/M	100-120%	Medium light industrial units with shared central operational yard space at ground level
Typology C.2 M vertical yard dependent	Specialised construction, manufacturing, wholesale	S/M	150-200%	Medium industrial units with shared operational yard space at multiple levels accessed by LGVs

*Plot ratio figures represent efficient site layouts accounting for access, servicing and yard space. Between 15-25% of total site areas should also be discounted for providing shared access routes, parking, shared amenity, planting, buffer, etc.

Hillingdon’s Existing Employment Typologies

- 6.1 The first step towards identifying Hillingdon-specific intensification typologies has been to assess employment sites across the borough through a combination of desk-based research and site visits to determine, among other things, predominant spatial typologies and operational scenarios. These existing typologies, combined with sector demand projections, provide a basis for the intensification typologies.
- 6.2 Existing Hillingdon employment typologies are categorised into the eight groups identified in Figure 29 below. These are not an exhaustive list of all employment spaces in the borough, but rather represent reoccurring typologies that offer the most potential for borough-wide employment intensification. The map indicates the locations of existing typologies and the following pages set out the key spatial, location and operational considerations of each typology.
- 6.3 It is recognised that there are a number of other employment typologies across the borough, for example large floorplate office blocks in Uxbridge Town Centre, but those set out below present the greatest opportunities for borough-wide intensification.

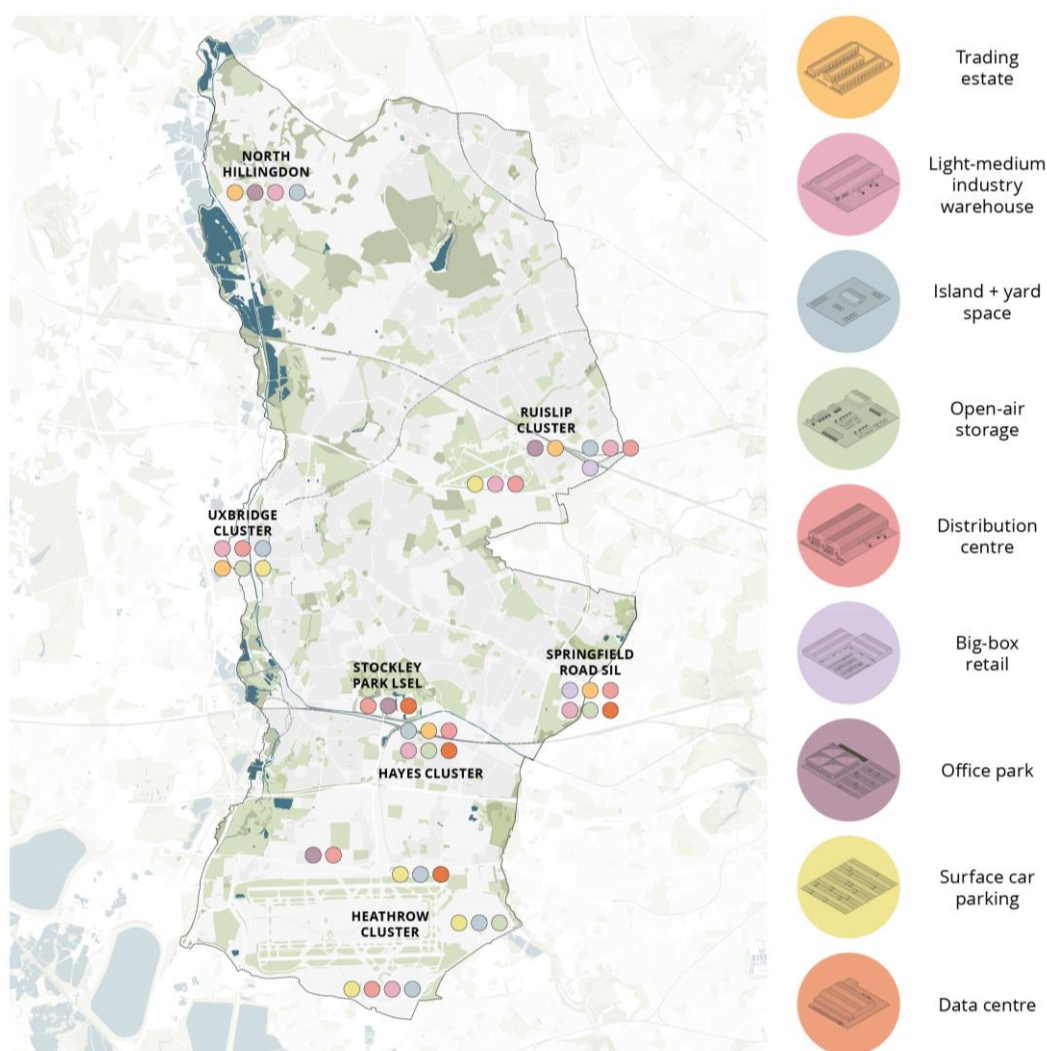
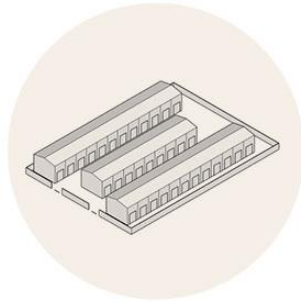


Figure 29 Existing Hillingdon Typologies Presenting Intensification Opportunities
 Source: Maccreanor Lavington, 2023



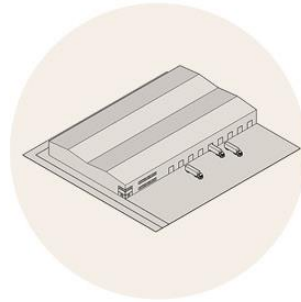
Trading Estate

An industrial business park typology made up of a mix of small and medium units accessed via a single access point.

Operational considerations: Typically a single-point of access. Shared service yard with loading spaces providing access to LGV and occasionally HGV directly in front of units. Shared parking. Limited operational yard required.

Typical uses: Diverse uses including manufacturing, logistics, retail, wholesale, trades

Locations: Hayes, Uxbridge, Packet Boat Lane, Braintree Road, Heathrow (in instances but not a dominant typology)



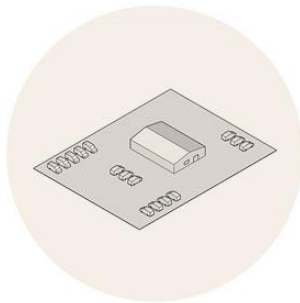
Light to medium industry warehouse

Typically single use building with a fenced perimeter and either a front or rear operational yard required to support industrial activity. Sometimes includes a mixed-use frontage with office space and employee parking.

Operational considerations: Typically a single point of access to yard space which accommodates LGV and/or HGV vehicle access.

Typical uses: Manufacturing, motor trades, light industry, building trade/retail

Locations: Hayes, Uxbridge, Packet Boat Lane, Stonefield Way - Victoria Road (Ruislip), Heathrow



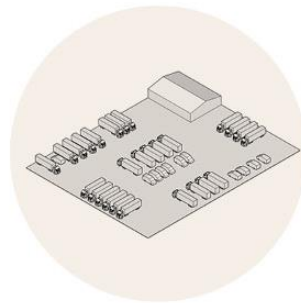
Island + yard space

Large portion of the site area required for operational yard or storage and typically has a small, single-storey building usually centrally located.

Operational considerations: Typically single point of access. LGV and/or HGV access required. Often secure, fenced perimeter. Limited ability to co-located with other uses or businesses.

Typical uses: Construction related trade, vehicle hire, aggregates, wholesale

Locations: Hayes, Uxbridge



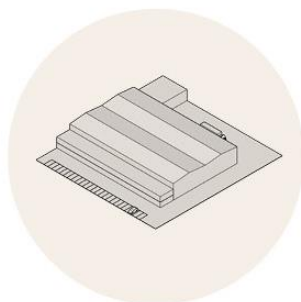
Open-air storage

Goods yard with no or very little built form typically for the storage or materials or vehicles.

Operational considerations: Secure, fenced perimeter with single access point.

Typical uses: Vehicle hire, aggregates, material depots

Locations: Hayes, Uxbridge, North Hillingdon



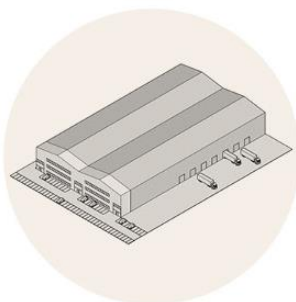
Data centre

A building used largely for housing a collection of computer servers for the storage, processing or distribution of data.

Operational considerations: Very high security perimeter, requires frequent HGV access, provision for offices and employee parking is often included. Often inactive frontages and poor boundary treatments. High energy and water demands.

Typical uses: Storage, ancillary spaces including offices

Locations: North of Bath Road, North of Colnbrook By-Pass, Springfield Road, Union Park, Stockley Park, Warnford Industrial Estate



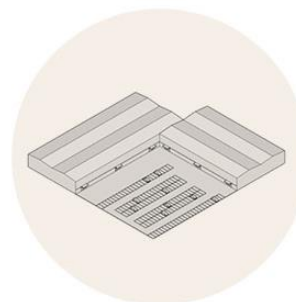
Distribution centre

Large-format, open warehouse space for the temporary storage of goods. Typically single-storey open spaces with long-spans facilitated by light-weight steel structures and are often climate controlled internally. External facades present large areas of blank-frontages and a secure, fenced perimeter.

Operational considerations: Loading and unloading areas with access for multiple HGVs simultaneously. Often employees parking and office space is located at the front of the building providing some street activation.

Typical uses: Wholesalers, retailers, distribution companies

Locations: North of Bath Road, Heathrow



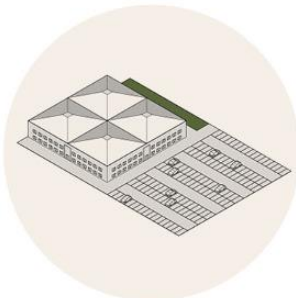
Big box retail+parking

A single retailer occupying a large, usually single storey building resembling a large 'box'. Often comprising units larger than 4000sqm.

Operational considerations: Private vehicle access and drop-off zone to the front of the building and generally large areas of surface car parking. Servicing zone to the rear to accommodate LGV and often HGV vehicles for loading and unloading. Can be co-located with other businesses and uses and are typically clustered together.

Typical uses: Chain retailer

Locations: Uxbridge, Stonefield Way / Victoria Way



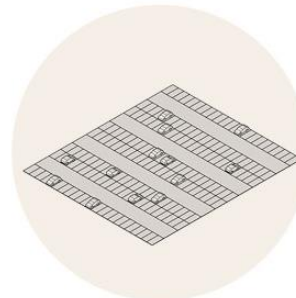
Office park

A collection of individual office buildings usually constructed around the same time. Shared surface car parking, amenities and ancillary uses are typically included such as parks, gyms and cafes.

Operational considerations: Typically vehicle access with one-two points of access and limited connectivity to surrounding street network. Large areas of surface car parking. Sometimes limited access to individual buildings and car parks.

Typical uses: Office, research

Locations: Stockley Park, Odyssey Business Park, Heathrow (North of Bath Road), North Hillingdon (small presence)



Surface car parking and vehicle storage

Hardstanding areas with no or limited built form. Typically provides undefined, inactive street frontages.

Operational considerations: Single vehicle entry / exit. Can be co-located with other uses.

Typical uses: employee parking, car rental, vehicle storage areas.

Locations: Heathrow (larger staff parking and car rentals), Hatton Cross (large staff parking), South of Bath Road (car rental), Uxbridge (smaller areas)

Hillingdon's Intensification Opportunities: Sector-Based Opportunities

- 6.4 The second step to identifying intensification typologies has been to consider projected growth sectors in Hillingdon and their typological requirements. The focus has been on industrial typologies rather than office typologies given the opportunities industrial sites present for intensification and because this is where the strongest future demand is expected to come from.
- 6.5 The table below sets out the strongest projected industrial growth sectors within Hillingdon alongside their predominant corresponding typology. Spatial criteria and parameters of the typologies is also provided to inform the Hillingdon-specific intensification opportunities.

Table 46: Hillingdon Industrial Growth Sectors and Preferred Typologies

Project industrial growth sector	Typical existing spatial typology	Location drivers	Unit sizes (S/M/L/XL)*	Collocation (Low - high)	Stacking (Y/N)	Yard space for primary operations
Land transport, storage and post (Heavy)	Distribution centre, open-air storage, warehousing	Heathrow, urban conurbation	L (70%) XL (30%)	Medium. Typically own plot	Yes. Ground dependent for HGVs.	Loading bays
Land transport, storage and post (Micro)	Trading estate, light industry warehousing	Urban conurbation proximity	XS	High	Yes. Ground dependent for HGVs.	Loading bays
Data storage and processing	Bespoke	Slough-Heathrow	L (50%) XL (50%)	Low. Stand-alone building	Yes	Loading bays
Wholesale	Distribution centre, warehousing, trading estates	Proximity to customer base	M (80%) L (20%)	High. Particularly smaller units	Yes	Loading bays
Air and water transport	Open-air storage, island and yard, parking	Heathrow	M (50%) L (50%)	Low. Typically stand-alone uses	Limited	Operational yard
Specialised construction	Island and yard, open-air storage, warehousing, trading estate	Proximity to customer base	S (20%) M (70%) L (10%)	Medium. For smaller units / lighter industry	Yes	Loading bay or operational yard
Manufacturing	Trading estate, warehousing, island and yard	Size and affordability drivers	S (30%) M (60%) L (10%)	Medium. For smaller units / lighter industry	Yes	Loading bay or operational yard
Utilities	Island and yard, bespoke	Potentially Heathrow	M	Low. Typically stand-alone	Limited	Loading bay

*Typical unit sizes: XS: 0-185sqm; S: 185-929sqm; M: 929-4645sqm; L: 4645-9290sqm; XL: 9290sqm+

Hillingdon's Intensification Opportunities: Site-Based Opportunities

- 6.6 The third step in the development of intensification typologies was to identify physical opportunities within Hillingdon. These opportunities, highlighted on the map below, represent existing site *types* within the borough that offer the most tangible intensification opportunities.
- 6.7 The site-based opportunities informed the use, scale, operational considerations and plot sizes of proposed typologies. Ultimately, these relate the proposed typologies to areas within Hillingdon so that, while

typologies can be applied across a wide variety of employment sites in the borough, they are derived from local considerations.

- 6.8 This work covers the most appropriate areas for intensification, though it is recognised that intensification may be appropriate on particular plots in other locations. These are generally smaller opportunities which fit into and align with one of the ten categories identified on the map below. There are also opportunities on undesignated sites that may come forward in the future that can be considered using the typologies set out below.

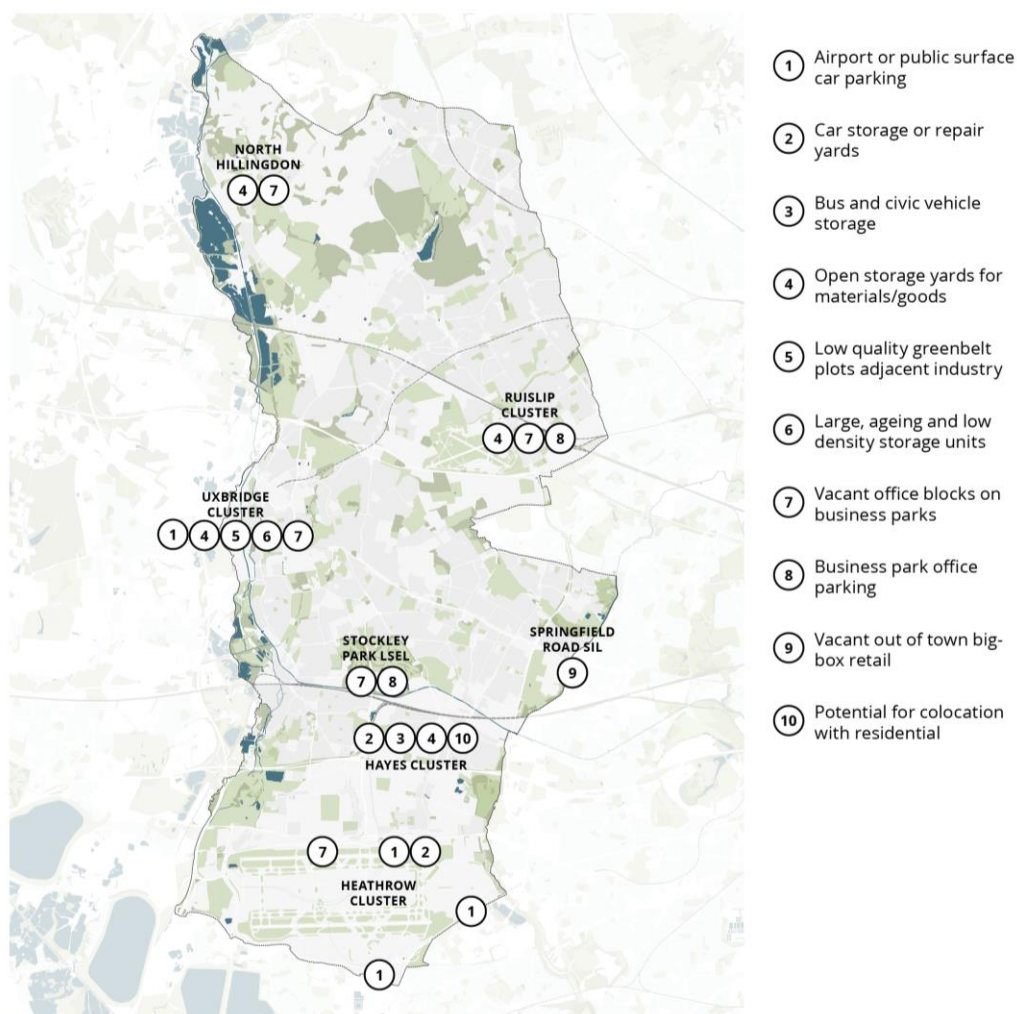


Figure 30: Hillingdon Site Based Opportunities

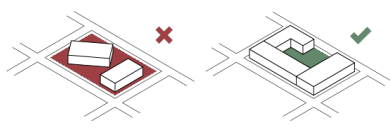
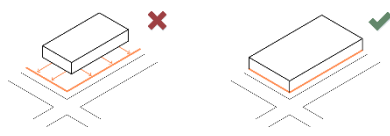
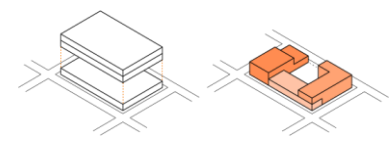
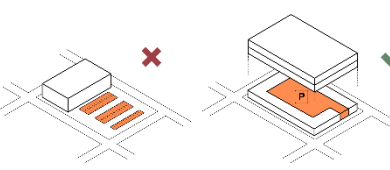
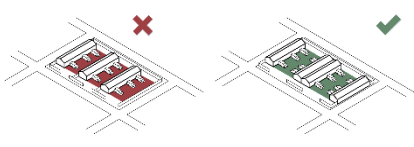
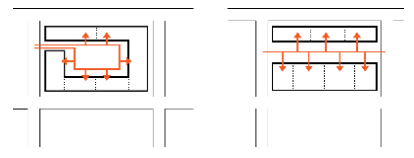


Source: Maccreanor Lavington, 2023

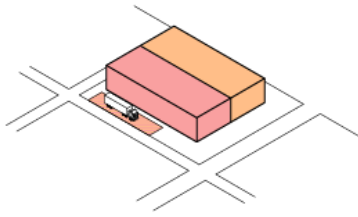
Design Criteria for Typology Development

- 6.9 The fourth step in developing intensification typologies has been to establish design criteria to inform the intensification and colocation of employment uses. The premise of establishing a set of design criteria is to facilitate an increase in density of uses through the optimisation of plots while respecting operational requirements, including access and servicing, and enhancing the quality and desirability of employment areas. These criteria have been informed both by best practice examples and existing typologies in the borough.
- 6.10 The criteria are not site-specific, but rather represent principles for developing attractive employment areas. As demand within employment areas increases, there is a risk that intensification of individual plots impacts public realm, adjacent areas and business operations. A set of design criteria that addresses qualitative and environmental considerations provides a framework for typologies as well as method for assessing the local

applicability of typologies. The design criteria cover the following themes: layout and form, access and servicing, edge conditions, and sustainability.

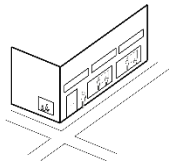
6.11 The proposed typologies are assessed against the criteria with key design and operational considerations set out for each theme.

Layout and form		<p>Efficient arrangement of massing on plots Maximise the use of plots through optimal geometry that reflects the plot size. Where possible, internalising and sharing service yards to increase plot coverage.</p>
		<p>Keeping the building line Build to the back edge of pavement to reinforce urban structure.</p>
		<p>Co-locating and stacking uses Where possible, optimise plots through co-location and stacking. Clustering similar or complementary uses to increase efficiency of shared infrastructure and strengthen identity of the area.</p>
		<p>Consolidate parking Integrate and consolidate parking within buildings or within a stand-alone parking structure. Individual areas of on-plot parking should be discouraged to improve overall efficiency of plots.</p>
Access and servicing		<p>Shared operational yards and loading bays Share servicing requirements between smaller and medium units where possible.</p>
		<p>Solve servicing internally or back-to-back Consolidate servicing to optimise use of the plot, reduce impact of servicing and operational yard activities on the surrounding and increase active streets.</p>
		<p>Keep larger vehicles (HGVs) at ground level To reduce structural requirements and inefficiencies in ramp design, provide HGVs access at ground level with good-lifts or potentially LGVs providing access to upper-level units.</p>
		<p>Integrate servicing and parking Optimise land-use and stacking potential through internal servicing and parking solutions.</p>



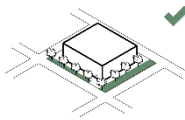
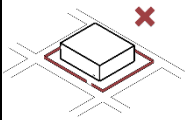
Consolidate servicing for smaller units

Provide shared serviced bays for HGVs for uses with occasional HGV access required.



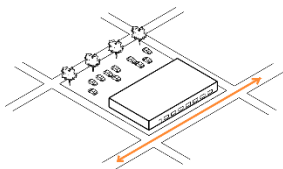
Active uses facing the street

Locate pedestrian entrances, offices, retail spaces to wrap uses with blank frontage to animate streets.



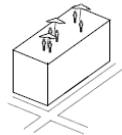
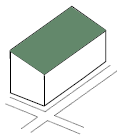
Avoid fenced-perimeter

Consider green, planted buffers or using built form to create secure plot lines.



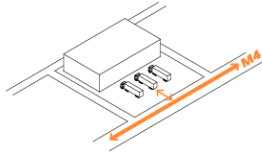
Reduce impact of parking and servicing bays

Locate servicing and parking bays away from main routes and integrate them with planting and street trees.



Attractive roofscapes

Where overlooked, treat roof as a fifth elevation and opportunity to contribute to achieving compliant Urban Greening Factor (UGF).

**Reduce servicing conflicts**

Locate uses with frequent HGV servicing requirements with good access to regional highway networks.

**Minimise impacts of 'dirtier uses'**

Arrange massing and uses to mitigate impact of 'dirtier' industrial uses from the surrounding areas.

**Uses as a buffer**

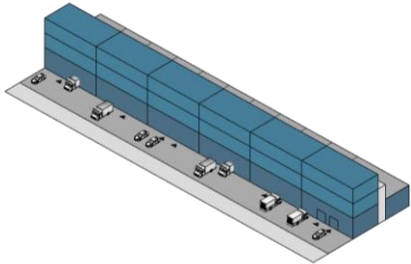
Consider colocation with lighter industrial and employment uses as a buffer to residential and mixed-use areas.

**Heat recovery**

Locate uses to create beneficial adjacencies for example to maximise heat recovery from industry (i.e. data centres).

Borough-Specific Intensification Typologies

- 6.12 As previously set out, it is anticipated that Hillingdon will need to provide a mix of industrial and employment spaces ranging from smaller units and offices to through large-scale distribution centres. Overall, it is expected that the borough will need to accommodate at least +42,577 sqm and +81,854 sqm of additional industrial and warehouse floorspace respectively.
- 6.13 Existing industrial and employment areas will need to make a contribution in meeting these needs. However, the majority of sites within these areas are already densely utilised. As such, any new development should seek to intensify and optimise plots while not adversely impacting the operational requirements of existing uses.
- 6.14 Acknowledging that industrial and other employment uses have a broad range of spatial and operational needs, a series of typologies have been developed in response to the existing and expected future demands of occupiers in the borough. These typologies broadly reflect the spatial and operational requirements identified and can be classified by the potential level of intensification offered.
- 6.15 These typologies are specific to meeting Hillingdon's future needs and therefore can be applied to sites in the borough that have been identified as having intensification potential to determine a range of floorspace uplift that can be achieved as set out in the next chapter. The design, delivery and location considerations for each typology are set out on the following pages.

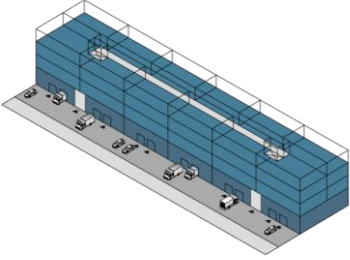
<p>Typology A.1</p> <p>Horizontal collocated light industry (small and medium units)</p>	 <p>Small scale industrial units organised in a horizontal run. Each unit has ground floor access from a shared front service yard. Can be provided in facing rows in a typical trading estate typology as well as co-located with other typologies. Goods lifts can provide access to upper levels.</p>
<p>Typical uses</p>	<p>Manufacturing, wholesale, post (micro) specialised construction</p>
<p>Layout considerations</p>	<ul style="list-style-type: none"> - Minimum 4-6m ceiling height. (6-8m if mezzanine level included) - Units typically 15-30m deep. Preferably clear spans for maximum flexibility - Size ranges: 5 units (less than 929sqm) - Best suited to uses that can be clustered
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Central shared servicing yard with goods lift access to upper-level units - Upper-level servicing area allowing for forklift access - 16m min loading bay to allow for regular LGV access - Shared loading bay to allow for occasional HGV loading
<p>Edge conditions</p>	<ul style="list-style-type: none"> - Avoid large sections of inactive façades by providing generous windows to each unit - Considering mirroring typologies around a central service yard to minimize impact of service yard and maximise efficiencies
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Spans of less than 15m deep provide efficient unit plans and good levels of internal daylight - Provide buffer to operational yard with built form or green spaces
<p>Suitable locations and viability</p>	<p>Two sub typologies were tested – A.1 Small and A.1 Large, to reflect the range of sizes that could come forward for this type of space across Hillingdon.</p> <p>These were tested at average passing rents and values for each appropriate location (see below). The residual development value or ‘outcome’ was then compared to the existing industrial land value. In Hayes and Heathrow, the Industrial land value is higher at £13.5mn / ha than the rest of the Hillingdon, which is understood to be on average c.£6mn / ha.</p> <p>The purpose of this testing was to determine where there may be delivery constraints across the wider employment clusters in Hillingdon, and where intervention may be required to support future fit-for-purpose stock coming forward. The outcome of the testing is summarised below:</p> <p>Typology A.1 Small:</p> <ul style="list-style-type: none"> • Uxbridge: Marginal • Ruislip: Not Viable • North Hillingdon: Not Viable <p>Adopted average value sets in Ruislip and North Hillingdon are insufficient to provide a return that is equal / above the cost of current industrial land in those locations (c.£6mn / ha).</p> <p>Typology A.1 Large</p> <ul style="list-style-type: none"> • Hayes Corridor: Viable <p>Please see Annex 2 for further information.</p>
<p>Potential locations</p>	<p>Hayes Corridor, Uxbridge, Ruislip, North Hillingdon</p>

Precedent



Brentwood, Vancouver
(2020)

2-storey, S-M light industrial units with direct access to a shared service yard

<p>Typology A.2</p> <p>Vertically collocated light industry (small and medium units)</p>	 <p>Small to medium sizes industrial units stacked vertically. Ground floor units have access to a shared service yard. Upper levels units are accessed via goods lifts with lobbies off the shared service yard.</p>
<p>Typical uses</p>	<p>Manufacturing, wholesale, post (micro) specialised construction</p>
<p>Layout considerations</p>	<ul style="list-style-type: none"> - Minimum 4-6m ceiling height. (6-8m if mezzanine level included) - Units typically 15-30m deep. Preferably clear spans for maximum flexibility - Size ranges: S – M units (less than 5000sqm) - Best suited to uses that can be clustered - Maximise efficiencies on sites by ‘mirroring’
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Central shared servicing yard with shared lobbies providing goods lift access to upper-level units - Wide corridors of minimum 3500mm to allow for forklifts to pass - 16m min front loading bay to allow for regular LGV access - Shared loading bay to allow for occasional HGV loading
<p>Edge conditions</p>	<ul style="list-style-type: none"> - Locate shared amenity spaces, offices, showrooms and other uses which provide animation and regular pedestrian movements along primary routes - Consider mirroring typologies around a central service yard to minimize impact of service yard and maximise efficiencies
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Spans of less than 15m deep provide efficient unit plans and good levels of internal daylight - Provide buffer to operational yard with built form or green spaces - Lighter industrial uses can be used as a buffer to heavier industry - Provide flexible open spaces with higher potential for reuse
<p>Suitable locations and viability</p>	<p>Two sub typologies were tested – A.2 Small and A.2 Large</p> <p>Typology A.2 Small:</p> <ul style="list-style-type: none"> • Uxbridge: Viable • Ruislip: Viable <p>Typology A.2 Large:</p> <ul style="list-style-type: none"> • Hayes Corridor: Viable <p>Value sets are sufficient across Uxbridge, Ruislip and Hayes Corridor to provide a return above the cost of respective industrial land.</p> <p>Please see Annex 2 for further information.</p>
<p>Potential locations</p>	<p>Hayes Corridor, Uxbridge, Ruislip</p>

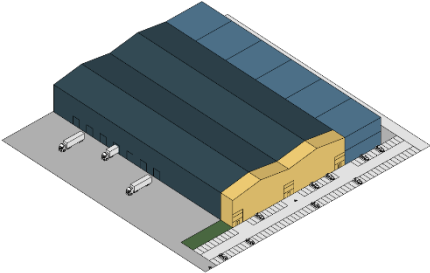
Precedent



Gewerbehof Laim, Munich
Germany (2001)

5 storeys of small light industrial
units accessed with 4no goods
lifts and load loading areas for
occasional HGV access

Corridors allow access for fork lift
trucks

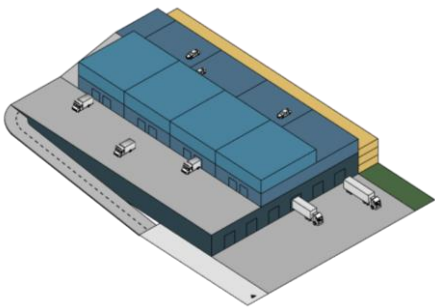
<p>Typology B.1</p> <p>Vertically collocated light industry (small and medium units)</p>	 <p>A group of small, stackable units attached to a larger, light industrial building that is ground dependent adjacent to a loading area that accommodates frequent HGV movements.</p>
<p>Typical uses</p>	<p>Distribution, storage, wholesale, big-box retail</p>
<p>Layout considerations</p>	<ul style="list-style-type: none"> - min 10-13m ceiling height for warehousing operations. Min 6-8m for medium light industrial units. - Size ranges and potential sub-divisions: L and XL units (greater than 4645sqm) with attached S and M units (185-4645sqm) - Large clear spans (+30m) in large industrial units provide maximum flexibility - Typical floorplate for large-scale industrial = 50x100m
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Loading and unloading area must be able to accommodate regular HGV movements (greater than 27m deep) - Should be located with good access to regional highway network - Consideration for separate employee parking to be consolidated - Dock levellers provided to large-format industrial units to support logistics operators
<p>Edge conditions</p>	<p>Office use associated with large industrial use should front the street</p>
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Separate HGV and pedestrian / cyclist movements - Use lighter industry to create active frontages and act as a buffer to service yard - Large roof areas highly suitable to PV / biodiverse roofs - Typical low lifespan buildings like distribution centres should be designed with circular economy (reuse, disassembly)
<p>Suitable locations and viability</p>	<p>A smaller sub typology was not envisaged for this. Only Typology B.1 Large was assumed and tested.</p> <p>This was tested using an average passing rent and value for each appropriate location (see below). The residual development value or 'outcome' was then compared to the existing industrial land value. In Hayes and Heathrow, the Industrial land value is higher at £13.5mn / ha than the rest of the Hillingdon, which is understood to be on average c.£6mn / ha.</p> <p>The purpose of this testing was to determine where there may be delivery constraints across the wider employment clusters in Hillingdon, and where intervention may be required to support future fit-for-purpose stock coming forward. The outcome of the testing is summarised below:</p> <p>Typology B.1 Large:</p> <ul style="list-style-type: none"> • Heathrow: Viable • Hayes Corridor: Not Viable <p>Sensitivity testing for Hayes Corridor indicates that a c.25% increase in rents to c.£23.46psf would allow for the development values to meet the cost of the Industrial land (set at c.£13.5mn / ha). Given transactional activity in the locality, this increase in rents may be achieved in the short to medium term.</p> <p>Please see Annex 2 for further information.</p>
<p>Potential locations</p>	<p>Heathrow, Hayes Corridor</p>


Precedent

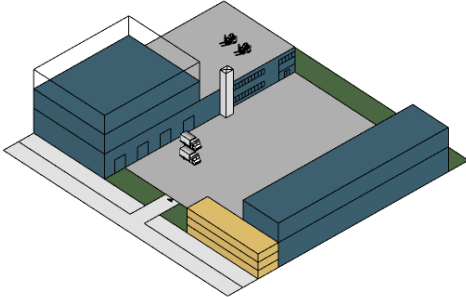


DC1, Amsterdam
Netherlands (2021)

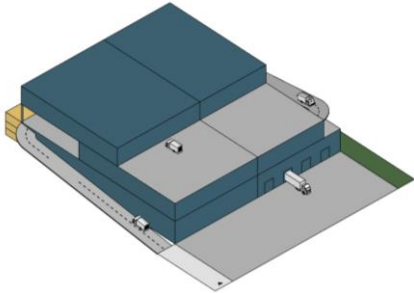
Single-story light-industry
with multi-level internal
layout that provides last-
mile delivery with offices
fronting the street.

<p>Typology B.2</p> <p>Stacked large format light industrial with medium and small units at upper levels.</p>	 <p>Large format, light-industrial warehousing typically with long clear-spans. Small and medium light industrial units stacked above. Access to upper units can be via LGV.</p>
<p>Typical uses</p>	<p>Distribution, storage, wholesale, big-box retail</p>
<p>Layout considerations</p>	<ul style="list-style-type: none"> - min 10-13m ceiling height for warehousing operations. Min 6-8m for medium light industrial units - Size ranges: L and XL units (greater than 4645sqm) with S and M units (185-4645sqm) stacked above - Clear spans (10-15m) for stacked industrial to balance occupier preference for large clear spans with structural efficiencies - Typical floorplate for large-scale industrial = 50x100m
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Loading and unloading area must be able to accommodate regular HGV movements (greater than 27m deep) - Consideration for separate employee parking to be consolidated - Upper level loading areas min 16m deep to allow for frequent LGV access
<p>Edge conditions</p>	<ul style="list-style-type: none"> - Office use associated light industrial potential to activate the street - Provide separate HGV access - Activate street by wrapping large, blank facades associated with large-scale industry with office uses associated with industry - Provide separate pedestrian / visitor entrance from the street
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Careful consideration of uses required for successful co-located - Suitable for the inclusion of PV / biodiverse roofs - Consolidate green space on plot to one edge to allow for coordination of green spaces across plots
<p>Suitable locations and viability</p>	<p>Two sub typologies were tested – B.2 Small and B.2 Large. Heathrow was considered to be the most appropriate location.</p> <p>This was tested at an average passing rent and value aligned to transactional activity seen in the Heathrow market cluster. The residual development value or ‘outcome’ was then compared to the existing industrial land value which is understood to be on average c.£13.5mn / ha.</p> <p>The purpose of this testing was to determine where there may be delivery constraints across the wider employment clusters in Hillingdon, and where intervention may be required to support future fit-for-purpose stock coming forward. The outcome of the testing is summarised below:</p> <p>Typology B.2 Small:</p> <ul style="list-style-type: none"> • Heathrow: Viable <p>Typology B.2 Large:</p> <ul style="list-style-type: none"> • Heathrow: Viable <p>Value sets at Heathrow are relatively strong, and at a level that allows the cost of Industrial land (£13.5mn / ha) to be met.</p> <p>Please see Annex 2 for further information.</p>

Potential locations	Heathrow
Precedent	 <p data-bbox="1136 271 1481 533">Binck Twins, Den Haag Netherlands (2004) Co-located, stacked industrial with offices with a shared operation yard at ground and first floor. Vehicle parking is provided on the roof of light industrial.</p>

<p>Typology C.1</p> <p>Small-medium operational yard dependent light industry</p>	 <p>Medium light-industrial units with shared central operational yard space. Operational yard space is central to business operations. Typically uses are stand-alone with secure perimeter.</p>
<p>Typical uses</p>	<p>Specialised construction, manufacturing, wholesale</p>
<p>Layout considerations</p>	<ul style="list-style-type: none"> - 4-8m ceiling height. (Min 6-8m where mezzanines are provided) - Size ranges: M units (1000-5000sqm) - Operational yard min of 27m deep to allow for HGV access
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Loading and unloading area must be able to accommodate regular HGV movements (greater than 27m deep) - Consideration for separate employee parking to be consolidated
<p>Edge conditions</p>	<ul style="list-style-type: none"> - Align warehousing to back-of-pavement and located associated office uses on primary routes Provide separate access for HGVs where possible - Use green, planted spaces or built form as a buffer to operational yard space
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Arrange massing on the site to provide buffers from service yard activities - Consider co-locating uses that require access to central service yard at different times of the day or night
<p>Suitable locations and viability</p>	<p>Two subtypologies were tested – C.1 Small and C.1 Large.</p> <p>These were tested at average passing rents and values for each appropriate location (see below). The residual development value or ‘outcome’ was then compared to the existing industrial land value. In Hayes, the Industrial land value is slightly higher at £13.5mn / ha than the rest of the Hillingdon, which is understood to be on average c.£6mn / ha.</p> <p>The purpose of this testing was to determine where there may be delivery constraints across the wider employment clusters in Hillingdon, and where intervention may be required to support future fit-for-purpose stock coming forward. The outcome of the testing is summarised below:</p> <p>Typology C.1 Small:</p> <ul style="list-style-type: none"> • Uxbridge: Not Viable • Hayes Corridor: Not Viable <p>Adopted average value sets in Uxbridge is insufficient to provide a return that is equal / above the cost of current industrial land in that location (set at c.£6mn / ha).</p> <p>Typology C.1 Large:</p> <ul style="list-style-type: none"> • Hayes Corridor: Not Viable <p>Sensitivity testing for Hayes Corridor, for both sub typologies, indicates that a c.15% increase in rents to c.£20.40psf would allow for the development values to meet the cost of the Industrial land (set at c.£13.5mn / ha). Given transactional activity in the locality for new build stock, this increase in rents may be achieved in the short term.</p> <p>Please see Annex 2 for further information.</p>

Potential locations	Hayes Corridor, Uxbridge
Precedent	 <p data-bbox="1166 271 1481 506">Brasserie de la Senne, Brussels, Belgium Brewery, distribution, and offices sharing a central yard. A bar and shop provide activity and animation along the primary route.</p>

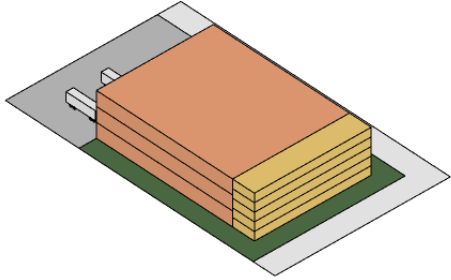

<p>Typology C.2</p> <p>Medium stacked industrial with stacked operational yard space</p>		<p>Medium industrial units (1000-5000sqm) with shared operational yard space at all levels. HGV access for ground level units and LGV access to upper level units. Can be for stand-alone uses or where uses can share operational / loading bays.</p>
<p>Typical uses</p>	<p>Specialised construction, manufacturing, wholesale</p>	
<p>Layout considerations</p>	<ul style="list-style-type: none"> - 6-8m ceiling height (Likely between 10-13m for warehousing operations) - Size ranges: S and M units (1000-5000sqm) - Large floorplates - 15m maximum structural spans to balance structural efficiencies with stacking 	
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Loading and unloading area at ground level must be able to accommodate regular HGV movements (greater than 27m deep) - Allowance for additional operational yard space at all levels - Min depth of upper-level loading bays 16m to allow for LGV access - Potential for parking to be provided on the roof 	
<p>Edge conditions</p>	<ul style="list-style-type: none"> - Provide showrooms, offices and ancillary uses to activate primary streets 	
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Frequent HGV movement unsuitable for locating near residential uses (also recommendation for separation of HGV/car + pedestrian traffic) - Optimise structural grid to reduce super structure requirements - Suitable for combined PV / biodiverse roof - Use landscape features to reinforce secure perimeter 	
<p>Suitable locations and viability</p>	<p>A smaller sub typology was not envisaged for this. Only Typology C.2 Large was assumed and tested.</p> <p>This was tested using an average passing rent and value aligned to the transactional activity present within the Hayes cluster area. The residual development value or 'outcome' was then compared to the existing industrial land value. In Hayes and Heathrow, the Industrial land value is understood to be on average c.£13.5mn / ha.</p> <p>The purpose of this testing was to determine where there may be delivery constraints across the wider employment clusters in Hillingdon, and where intervention may be required to support future fit-for-purpose stock coming forward. The outcome of the testing is summarised below:</p> <p>Typology C.2 Large:</p> <ul style="list-style-type: none"> • Hayes Corridor: Not Viable <p>Sensitivity testing for Hayes Corridor indicates that a c.15% increase in rents to c.£20.40 would allow for the development values to meet the cost of the Industrial land (set at c.£13.5mn / ha). Given transactional activity in the locality, this increase in rents may be achieved in the short term.</p> <p>Please see Annex 2 for further information.</p>	
<p>Suitable locations</p>	<p>Hayes Corridor</p>	

Precedent



Belartza Donostia, Spain

2-levels of stacked industry with a central, shared operational yard and upper level units accessed via LGV and parking provided on the roof

<p>Typology D</p> <p>Stand-alone data centre</p>		<p>Large to XL units (>5000sqm) with provision for HGV access at ground level and separate public-facing reception and office space. Stand-alone use with a secure perimeter and single-point of controlled access.</p>
<p>Typical uses</p>	<p>Data storage, office, energy centre (heat exchange)</p>	
<p>Layout considerations</p>	<ul style="list-style-type: none"> - 6-8m ceiling height (Likely between 10-13m for warehousing operations) - Size ranges: S and M units (1000-5000sqm) - Suitable for co-location with associated workspace, mindful of required high-security perimeter. - Not suitable for co-location with other industrial uses - Plot ratios should be in-line with surrounding urban grain to avoid large, incongruous blank boxes 	
<p>Access and servicing</p>	<ul style="list-style-type: none"> - Loading and unloading area at ground level must be able to accommodate regular HGV movements (greater than 27m deep) - Should be located with good connectivity to major transport infrastructure - Separate access should be provided directly from the street for ancillary office/reception areas 	
<p>Edge conditions</p>	<ul style="list-style-type: none"> - Locate reception area, offices and ancillary uses to activate primary streets - Soften security measures by using green infrastructure, water features and barriers integrated either into the built for or landscape elements - Activate typically blank facades with lighting, architectural expression or art 	
<p>Environmental considerations</p>	<ul style="list-style-type: none"> - Typically 25 year lifespan so should be designed with circular economy principle (disassembly, reuse of super structure) - High energy consumption. Waste energy should be used in district heating solutions - Modern, natural, cooling methods should be considered to free up space on the roof for greening - Use green-buffer as secure perimeters to contribute to UGF and biodiversity uplift - Should be located away from residential neighbourhoods 	
<p>Suitable locations and viability</p>	<p>It was agreed that typology testing for Data Centre would not be carried out.</p>	
<p>Potential locations</p>	<p>N/A</p>	
<p>Precedent</p>		<p>AM4 Data Centre, Amsterdam</p> <p>Multi-level data centre with separate office block. Secure perimeter achieved with a 'moat', providing an attractive barrier and referencing the Netherlands extensive canal network.</p>

7. Capacity Context: Investigating the Potential of Existing Employment Land

Chapter Summary

This chapter sets out the potential uplift of industrial floorspace that could be achieved in Hillingdon alongside a detailed description of the methodology used to calculate this.

The first half of the chapter provides a brief summary of how the plot ratios for the typologies presented in Chapter 6 have been determined and how these typologies have then been applied to plots to develop both a 'low-level intensification' uplift scenario and a 'high-level intensification' uplift scenario.

The second half of the chapter sets out the theoretical uplift range of industrial floorspace that could potentially come forward across Hillingdon and breaks the contribution down by employment cluster. It provides details on area-specific factors that impact the overall potential of the employment cluster to deliver an increased uplift in floorspace (e.g. sensitive surrounding context, the availability of smaller plots or prevalence of yard-based typologies).

The key messages from the analysis presented is that the theoretical floorspace uplift that could be delivered across all opportunity plots within Hillingdon is between **202,920 to 376,140 sqm**. An overview of the range of total theoretical potential uplift is summarised below by employment cluster in the table below.

Employment cluster	Potential floorspace (sqm)		Comments
	Low-level intensification scenario	High-level intensification scenario	
Heathrow Cluster	97,430	159,910	Greatest opportunity for floorspace uplift due to strategic location, availability of large plots and potential for greater intensification to come forward in this location.
Hayes Cluster	42,830	84,500	Large industrial area with good availability of opportunity plots that range in scale and character.
Uxbridge Cluster	36,760	93,890	Largest amount of opportunity plots and greatest 'developable area' potential but limited by scale, location and profile of the area.
Ruislip Cluster	23,410	36,860	A collection of individual opportunity plots in disconnected industrial areas.
North Hillingdon Cluster	2,480	6,970	Limited availability of opportunity plots (1no).

Methodology

Typologies

- 7.1 Chapter 6 sets out the Hillingdon-specific typologies that have been used as the starting point for calculating uplift. These typologies are a result of the analysis of existing typologies, best-practice precedents of industrial intensification and physical and sector-based opportunities. As such, they are not site-specific but intended to be applied to different locations across the borough and are tailored to the specific needs identified in the borough. To reflect that both the size of sites and intensification opportunity will vary across

locations, the plot uplifts associated with these typologies are presented as a range rather than a prescriptive figure.

- 7.2 For the purposes of the plot uplift calculations, two options for each typology have been used that represent a low-end and high-end in uplift potential. At the borough-level, this results in a range in theoretical floorspace uplift that represents a modest redevelopment scenario of all plots to a maximum redevelopment scenario of all plots that could theoretically, though unlikely, be achieved. The table below sets out the plot ratios and a plot size band for each typology that have been used as the basis for the uplift calculations.

Table 47 Typology Plot Ratios: Low End and High-End Uplift Potential

Typology	SMALL TYPOLOGY OPTION			LARGE TYPOLOGY OPTION		
	Storeys	Plot range (ha)	Plot ratio (%)*	Storeys	Plot range (ha)	Plot ratio (%)*
A.1	2	0.25-0.5	105%	3	0.4-1	140%
A.2	4	0.3-0.6	170%	2-5	0.1-1.5+	190%
B.1	N/A	N/A	N/A	1.5-4	1.5-2.5+	100%
B.2	2-3	1.0-2.0	115%	3	1.0-2.0+	150%
C.1	1.5	0.8-1.5+	80%	2-3	1.5+	100%
C.2	2	1.0-1.5+	110%	3	1.5+	180%

*Plot ratios = total gross floorspace/net plot area

Opportunity Plot Selection

- 7.3 As set out in Chapter 5, the starting point for identifying plots to apply these typologies to was to assess employment *sites*. These were:
- Average building age
 - Location character
 - Amenities
 - Access and parking
 - Vacant land and buildings
 - Strategic connectivity (vehicular and public transport)
 - Policy alignment
- 7.4 Through this evaluation, 13 sites were identified as having intensification and or re-development/re-orientation potential as identified in the table overleaf.
- 7.5 Following this exercise, an evidenced view has been reached on parts of these sites where there are opportunities for intensification and/or re-development/re-orientation ('opportunity plots'). Some employment sites are quite large (Hayes) and in these, multiple plots have been identified while other employment sites (North Hillingdon) have limited obvious opportunities for intensification. To come to an understanding of which plots have opportunities, the following range of factors has been taken into consideration:
- **Plot usage:** identification of vacant or under-utilised land such as for storage or car parks.
 - **The condition of existing stock:** plots with buildings older than 20 years could be considered suitable for redevelopment as this represents the expected lifespan of typical industrial buildings.
 - **Existing uses:** some heavy industry as well as strategic infrastructure are considered to be less readily capable of intensification and have been discounted.

- **Ownership:** plots with complex landownership may require costly consolidation and represent a significant barrier to redevelopment. These have been discounted.
- **Size:** plots have been identified that could realistically support industrial intensification and very small plots have been discounted.

7.6 The resultant ‘opportunity plots’ provide the starting point for determining potential uplift for each area.

Identifying Appropriate Typologies by Cluster

7.7 The first step in the selection of suitable typologies for each opportunity plot was to identify which typologies are appropriate and could contribute to the growth and character of employment *clusters*. Drawing from the site visits and the evidence base presented in Annex 1, the relevant existing characteristics of employment clusters including strategic location, use profile and immediate context were considered to do this. A brief summary of relevant characteristics and how they informed the initial selection of typologies is set out in the table below.

Table 48 Typologies by Cluster

EMPLOYMENT AREA	RELEVANT CHARACTERISTICS	INITIAL TYPOLOGY SELECTION
Heathrow Cluster Sub area sites: 1.1. Covert Farm 1.2. Southern Perimeter Rd 1.3. Hatton Cross 1.4. South of Bath Road 1.5 North of Bath Road	The uses and existing typologies are characterised by the proximity and relationship to the airport: warehousing, distribution, car rentals, car parking and some office space. There is generally good levels of occupancy and demand. Most sites have good access to the strategic road network but several have low PTAL levels.	B.1 / B.2: Typologies that incorporate warehousing and distribution that can capitalise on the strategic location near Heathrow and connections to main arterial routes. A.1 / A.2: Smaller sites that cannot accommodate large-scale units may be appropriate for some stacked light-industry.
Hayes Cluster Sub-area sites: 2.1 Hayes Industrial Area	A large SIL with 95% industrial uses with a mix of warehousing, trading estates, vehicle storage/depots, material storage and heavier industrial uses. At the eastern end, there is a growing centre within walking distance to Hayes and Hillingdon station with new residential and commercial developments coming forward. Capitalising on the area’s strategic connectivity, there are also some newer, larger-scale distribution units.	A.1 / A.2: Small-medium sites are considered appropriate for horizontally-colocated units similar to the existing trading estate typology in the area. Higher-density vertically stacked units may be appropriate closer to the emerging centre around the station. C.1 / C.2: Several sites in the SIL contain yard-dependent uses and these typologies may be appropriate for medium-sized sites with less-sensitive edge conditions and lower PTAL levels. B1: Given the area’s connectivity, larger sites are considered appropriate for B1 in the high-intensification scenario.
Uxbridge Cluster Sub-area sites: 3.1. North Uxbridge Industrial Estate 3.2. Uxbridge Industrial Estate	Two SILs located on the western edge of Hillingdon bordered by greenbelt/open space land. Uxbridge Estate is predominantly industrial (80%) with a mix of light-industrial warehousing, open and vehicle storage and trading estates. It has both low connectivity to public transport and the strategic road network. North Uxbridge presents a more mixed picture with 60% industrial uses alongside offices, residential and other uses. It has a direct connection to the A40 and Uxbridge Station is within walking distance.	A.1 / A.2: The existing use profile and existing typologies within the areas and combined with the small and awkward geometries of several plots suggests a small, light-industrial typology would be suitable. C.1 / C.2: The intensified yard-based typologies have been included for Uxbridge Estate reflecting the prevalence of yard-based industry in this location and its low strategic connectivity. These typologies may be more suited to internal locations within the SIL away from adjacent environmental features / greenbelt land.

EMPLOYMENT AREA	RELEVANT CHARACTERISTICS	INITIAL TYPOLOGY SELECTION
Ruislip Cluster Sub-area sites:	A collection of smaller sites in west Hillingdon with varied uses/characters:	A range of typologies are suitable based on the sub-area identity:
4.1. RAF Northolt	Small site with very poor PTAL and access to the strategic road network characterized by airport-related services	B.1 / A.1 / A.2: Light industrial typologies that could contribute to the airport-related activities on the site.
4.2. Stonefield Way	A SIL with 95% industrial uses characterised by medium-large warehousing uses. There is a close relationship to neighbouring residential and big-box retail uses.	B.1 / B.2: A larger, rectilinear site that could accommodate medium-large warehousing reflecting the surrounded typologies and relative high-quality nature of the industrial area.
4.3 Odyssey Business Park	A small LSEL with a cluster of older office buildings with high-vacancies surrounded by surface car parking. PTAL is low but the site is well connected to the strategic road network.	B1 / B.2 : Potential to bring forward light industrial for warehouse / distribution reflecting good strategic road connectivity and low PTAL. These are likely to be less-intense typologies given the surrounding residential context.
4.4 Braintree Road	A small LSIS within walking distance from South Ruislip station with a mix of small businesses in trading estates/medium warehousing.	A.1 / A.2: Smaller industrial units that could re-provide / enhance the mix of small businesses within the site and provide an appropriate buffer to residential.
North Hillingdon	An LSEL with self-contained offices surrounded by designated open spaces and directly adjacent the river. The site has poor PTAL and low connectivity to the strategic road network.	A.1 / A.2: A small-site with irregular geometry that could likely only accommodate smaller industrial units.

Identifying Appropriate Typologies by Plot

7.8 The second step in the selection of typologies was to identify which typologies are most suitable at the plot level. Though an element of professional judgement has been used in selecting typologies, the following factors have been taken into consideration as well as the typologies deemed suitable at the cluster level:

- **Size site and proportion:** Larger typologies, particularly multi-level facilities with ramped access to upper levels, require larger plots with regular geometry that can accommodate the footprint of a large-format, rectilinear industrial unit.
- **Strategic location:** The nature of activities that a typology supports should complement its strategic location. For example, typologies that require frequent servicing of HGVs should be located with good access to the strategic road network. Similarly, plots with good public transport connectivity may be better suited to typologies with higher job density such as stacked light-industrial units.
- **Existing uses and business activities:** Typologies should reflect the nature of the local economy and existing business activities within industrial areas. For example, the area around Heathrow is characterised by distribution uses and may be less appropriate for manufacturing or yard-based typologies.
- **Townscape:** Where employment areas border on more sensitive uses such as residential or open space, consideration has been given to the impact of the massing on the surroundings.
- **Nuisance, safety and proximity:** Where plots are in close proximity to sensitive context such as residential areas, employment centres, public open space or environmental assets, consideration has been given to the uses a typology would likely support. For example, yard-based typologies are likely to be less suitable in these instances.
- **Viability considerations:** While the findings of the viability report have been considered, some flexibility has also been assumed to take account of evolving commercial contexts. If pressures on industrial land continue to increase in line with current trends, a typology that may not be viable in today's market conditions, may become viable over the medium-to-long-term future.

Calculating Plot Uplift

- 7.9 Following the identification of appropriate typologies for application within sub-areas and individual plots, the potential uplift for each 'opportunity plot' has been calculated by applying the plot ratio to the re-developable plot area and subtracting any existing industrial floorspace. Each step of this methodology is set out below:
- I. The first step in the process has been to determine the overall plot area by measuring the extent of the 'opportunity plot' using GIS. Although this often corresponds to the land-ownership boundary, the plot boundaries have been drawn to a logical redevelopment area and may include multiple ownerships.
 - II. The second step in calculating plot uplift has been to determine the existing floorspace within each plot. For the majority of plots, VOA or CoStar data has been used to obtain the existing floorspace figures. For a small percentage of plots where no data was available, floorspace has been estimated by taking a measure from digital information of the site.
 - III. The next step in calculating plot uplift has been to determine the potential re-developable area of the plot. The plot ratios set out at the beginning of this section represent the potential uplift within a net plot area measured to the typology boundary (including servicing areas). However, within each plot boundary there will be a percentage of land that cannot be developed. To provide a more realistic representation of the development potential of sites, either 15% of the plot area for individual plots or 25% for larger sites which contain multiple plots have been discounted to account for the following:
 - A. 15% for individual plots: buffer zones, utilities within the site, on-site parking (assumed to be minimal), inefficiencies as a result of geometries, and retained environmental features such as trees
 - B. 25% for larger sites containing multiple plots: a larger portion of the site has been discounted to allow for the above as well as primary access routes, collective car parking and provision of shared amenity spaces
 - IV. Appropriate typologies are then selected based first on the characteristics of each sub-area and then on the individual plots. The plot ratio for the typology is then applied to the discounted plot area. For each plot, both a low-level of intensification and a high-level intensification scenario has been presented. The low-level scenario represents moderately intensified plots with limited vertical stacking. The high-level scenario applies a more intensified typology with increased stacking and / or colocation to represent a maximised development potential of the site.
 - V. The final step is to determine the potential uplift range by subtracting the existing floorspace on the plot from the theoretical floorspace that could be delivered with the intensified typologies.
 - VI. The figure below illustrated each step in the process.

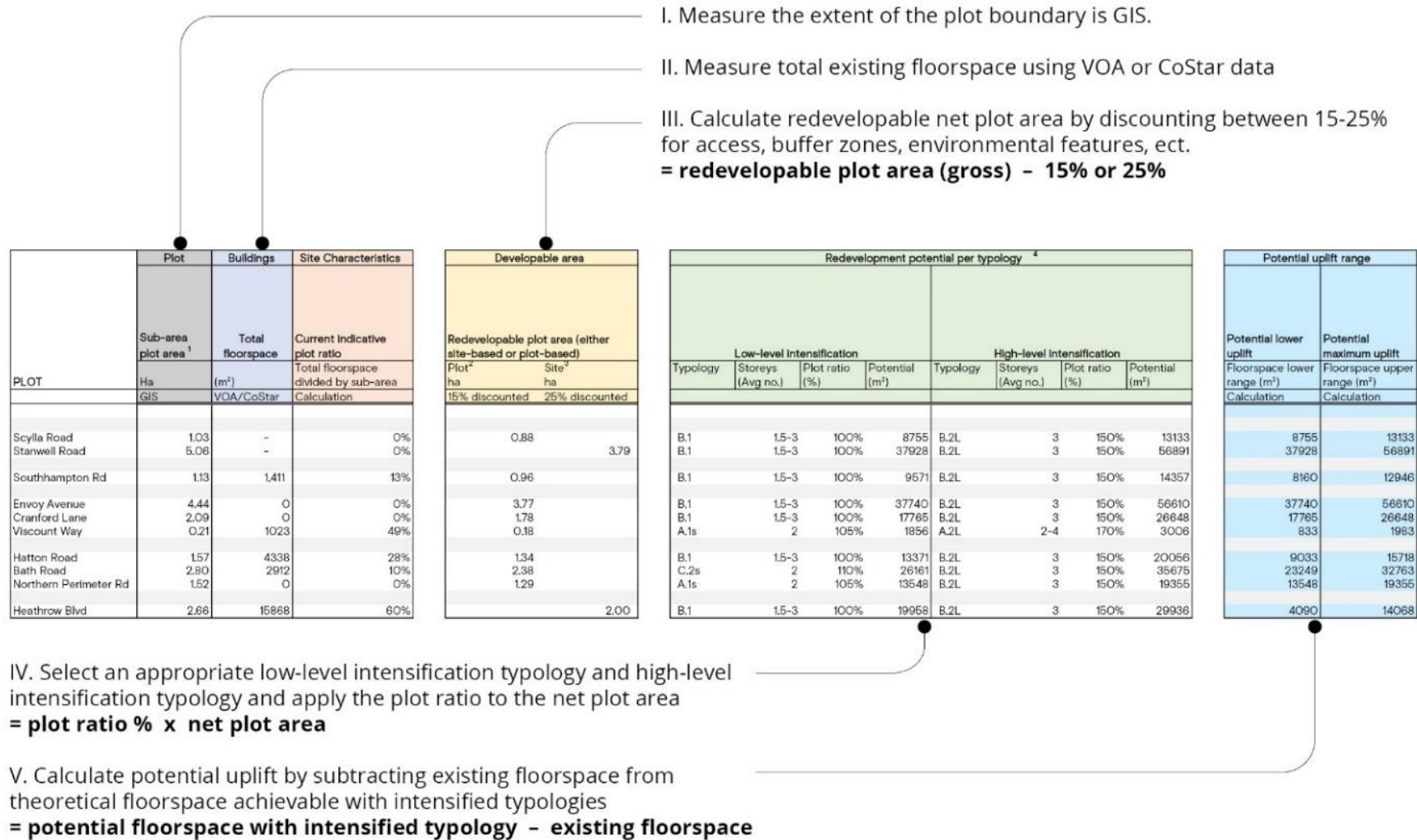


Figure 31 Calculating Plot Uplift
 Source: Maccreanor Lavington, 2023

Assumptions and exclusions

- 7.10 The above methodology is underpinned by the evidence base set out in Annex 1 and site visits. However, many additional factors outside the consideration of this study will impact both whether opportunity plots are likely to come forward for redevelopment and the nature of redevelopment. It is beyond the scope of this study to consider the full extent of environmental, market and planning contexts for each plot and the key assumptions and exclusions are set out below:
- I. Existing environmental site conditions including underground services, ground conditions, contamination, green spaces or other environmental conditions that will impact the feasibility of redevelopment have not been considered in the plot selection.
 - II. It has been assumed that there will be no retention of existing buildings within the plot boundaries.
 - III. While important planning considerations such as listed buildings have been taken into account when selecting plots, a detailed analysis which includes existing permissions, proposed infrastructure, TPOs, local designations or height restrictions has not been undertaken.
 - IV. A high-level assessment has been made in relation to the location of sites including their proximity to the existing strategic road network, neighbouring uses and townscape. However, the operational and spatial needs of surrounding businesses, the capacity of the road network and infrastructure has not been assessed.
 - V. The intensification of plots has been assessed on an individual basis and their interrelationship has not been considered. For example, the high-level intensification on one site will likely impact the redevelopment opportunities of neighbouring sites (an employment cluster may be able to support one 4 storey stacked light industrial scheme but not several). A detailed masterplan-led approach would be required to obtain a more granular picture of uplift potential of individual employment clusters.
 - VI. The recommendations presented in the viability report have been used to guide the typology selection process. However, the viability assessment presents a snapshot of today's market conditions and it is considered that other typologies may represent medium or longer-term future opportunities for intensification. Particularly if the pressures facing industrial land across London continues to increase in-line with current trends.

Floorspace Uplift

- 7.11 Using the methodology set out above, the calculated range of theoretical uplift that could be delivered across all 'opportunity plots' is between **202,920 to 376,140 sqm**. It is difficult to break this down by use class as some typologies have a mix of industrial uses, or can be adapted to provide general industrial or warehousing depending on the size of unit that comes forward, but if a use class is ascribed to the dominant typology these total can be broken down as follows:
- General Industrial (B2/EG(iii)) Floorspace: 88,480 to 58,200 sqm⁴².
 - Warehousing (B8) Floorspace: 114,440 to 317,940 sqm.
- 7.12 The contribution of each employment cluster to these totals is set out in the text and figure below. Annex 3 provides a detailed breakdown of the analysis and the figures underpinning these totals.
- 7.13 It is important to note that this theoretical uplift has been calculated for all available 'opportunity plots' inside and just outside of the employment site boundaries identified by LBH⁴³. If plots outside of site boundaries are excluded, then the potential uplift would be reduced by between **-51,470 and -76,250 sqm**.

⁴² While it does not seem intuitive, these two figures are purposely written in this order with 88,480 sqm representing the 'lower intensity' option and 58,200 sqm representing the 'higher intensity' option for General Industrial (B2/EG(iii)). This is because under the 'high intensity' option several of the plots identified for General Industrial uses (B2/EG(iii)) for the 'low intensity' option have shifted to Warehousing (B8) typologies instead as these represent the most intense uses for the plot. This reflects wider trends in London where the most intense industrial developments tend to cater for warehousing and distribution uses. This also explains why there is such a dramatic increase in the Warehousing (B8) figures from the 'lower intensity' and 'higher intensity' options. These figures have been taken through the supply-demand balance in this order to be consistent with the capacity study.

⁴³ Only two outside site boundaries identified by LBH have been identified and included in these calculations. These are the large vacant/underutilised car park adjacent to Covert Farm and the vacant/underutilised area to the east of South of Bath Road,

- 7.14 In contrast, plots that have been identified as 'sensitive' due to development being restricted by their proximity to Heathrow Airport and RAF Northolt have been excluded from the calculations. If these plots come forward, then a further increase of between **85,250 and 132,890 sqm** could potentially be identified.

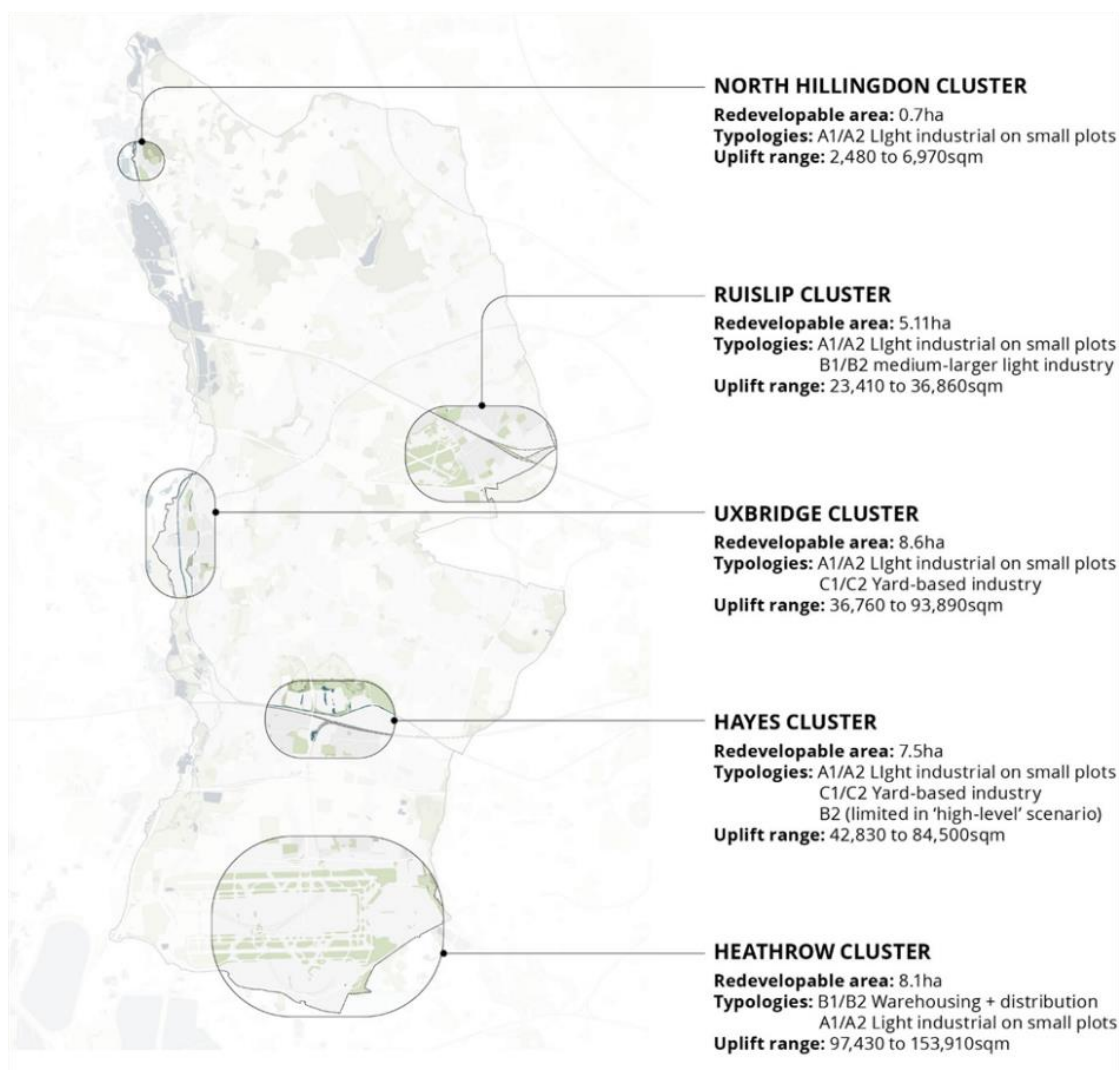


Figure 32 Theoretical Floorspace Uplift by Cluster

Source: Maccreanor Lavington, 2023

Heathrow Cluster

- 7.15 As a whole, the Heathrow cluster has the largest potential to provide an uplift in floorspace in comparison to the other employment areas. Per hectare, it has the highest theoretical plot uplift and, at a borough level, can potentially make a significant overall contribution (along with Hayes and Uxbridge) to meeting industrial floorspace demand by providing between 97,430 to 153,910 sqm.
- 7.16 This is a result of both the availability of larger plots that can not only deliver typologies with larger units but also increased potential for stacking. The increasing demand for logistics and warehousing facilities to support the airport functions as well as the strategic road connectivity all support higher-intensification typologies coming forward. There is less evidence to support yard-based typologies, which achieve lower plot ratios.

Hayes Cluster

- 7.17 The Hayes cluster has the second highest theoretical plot uplift per hectare and overall can potentially contribute between 42,830 to 84,500 sqm industrial floorspace. This is significantly less than the Heathrow

cluster but comparable to Uxbridge, both of which have a greater number of plots and total developable area potential than Hayes.

- 7.18 These figures reflect that while the Hayes cluster is considered an appropriate location for some higher-density typologies, such as stacked light-industrial, some yard-based industry has also been included with lower plot ratios resulting in a floorspace/hectare ratio that sits between Heathrow and Uxbridge clusters.

Uxbridge Cluster

- 7.19 The Uxbridge Cluster has the potential to deliver between 36,760 and 93,890 sqm of industrial floorspace uplift with a similar plot uplift per hectare to Ruislip. Despite the large number of plots available, there is a prevalence of smaller plots with awkward geometries that have less potential to deliver stacked industrial or larger floorplate units. The area is also considered less suitable for high-levels of stacking and appropriate for yard-based industrial typologies both of which contribute to a lower uplift potential.
- 7.20 Out of all the employment areas, the Uxbridge cluster has the widest theoretical uplift range. The 'potential maximum uplift' is perhaps slightly higher than would realistically come forward as a result of applying typologies to individual plots rather than considering the area holistically. Although higher-density stacked light industrial units (A.2) may be appropriate at the plot-level, the area may not be able to support multiple similar developments.

Ruislip Cluster

- 7.21 The Ruislip Cluster has the potential to make a modest contribution to the borough's industrial supply of between 23,410 to 36,870 sqm. This is a result of the limited number of opportunity plots available. However, the regular geometry, size and strategic location of these plots, combined with the relative success and occupancy levels of the adjacent industrial areas suggest that some more intense typologies could come forward in the 'high-level intensification' scenario.
- 7.22 It is worth noting that roughly forty percent of the industrial uplift is achieved within the Odyssey business park area primarily due to the large plot size. Although the area has been identified as potentially suitable for light-industrial uses, it has been assumed that lower-density schemes would be more appropriate in this location due to the sensitive residential context.

North Hillingdon

- 7.23 North Hillingdon provides a limited contribution to the overall borough industrial floorspace of between 2,480 and 6,970 sqm as a result of only having one opportunity plot which is the Salamander Quays area which is ripe for re-orientation. The relatively small plot footprint also restricts the typologies that can come forward on the site. The isolated nature of the plot and proximity to both residential and high-quality green spaces also make this an unsuitable site for frequent HGVs or yard-based activities suggesting there is limited industrial uses that could be appropriate in this location.

8. Recommendations

- 8.1 This study provides a clear and detailed overview of demand and need for employment floorspace in Hillingdon, as well as the amount of supply that is (a) currently available, (b) in the pipeline or (c) could be unlocked via intensification and/or re-development. To determine whether this supply is sufficient to meet future demand and need this chapter sets out the demand-supply balance. This, alongside other analysis throughout the report, is then used to identify a series of strategic recommendations for future employment provision in the borough.

Demand Supply Balance

Supply Dynamics

- 8.2 As shown in the figure overleaf, the supply of employment floorspace in Hillingdon consists of:
- a) The amount of employment floorspace that is currently available for lease or sale.
 - b) The quantum of employment floorspace expected to come forward from extant, unimplemented and/or in-progress planning permissions.
 - c) The potential increase in employment floorspace that could be unlocked via intensification and/or re-development.

All numbers are based on analysis undertaken in mid-2023.

- 8.3 As set out in Chapter 5 and Appendix 1, there is currently around **241,947** sqm of employment floorspace that is currently available for lease or sale. By use class there is:
- 190,654 sqm of available office (EG(i)/(ii)) floorspace.
 - 18,705 sqm of available general industrial (B2/EG(iii)) floorspace.
 - 32,588 sqm of available warehousing (B8) floorspace.
- 8.4 Extant, unimplemented and/or in-progress planning permissions could, however, lead to a decrease of around **-68,563** sqm of supply if fully implemented. This is driven by:
- Expected loss of -69,497 sqm of office (EG(i)/(ii)) floorspace.
 - Expected loss of -24,480 sqm of general industrial (B2/EG(iii)) floorspace.
 - Expected gain of +25,414 sqm of warehousing (B8) floorspace.
- 8.5 This means that over the short-to-medium term there may be **c173,384 sqm** of available employment floorspace supply in total within Hillingdon from these two sources (see Table 49), including c121,157 sqm of office (EG(i)/(ii)) floorspace and 58,002 sqm of warehousing (B8) floorspace, counterbalanced by the loss of around -5,775 sqm of general industrial (B2/EG(iii)) floorspace.

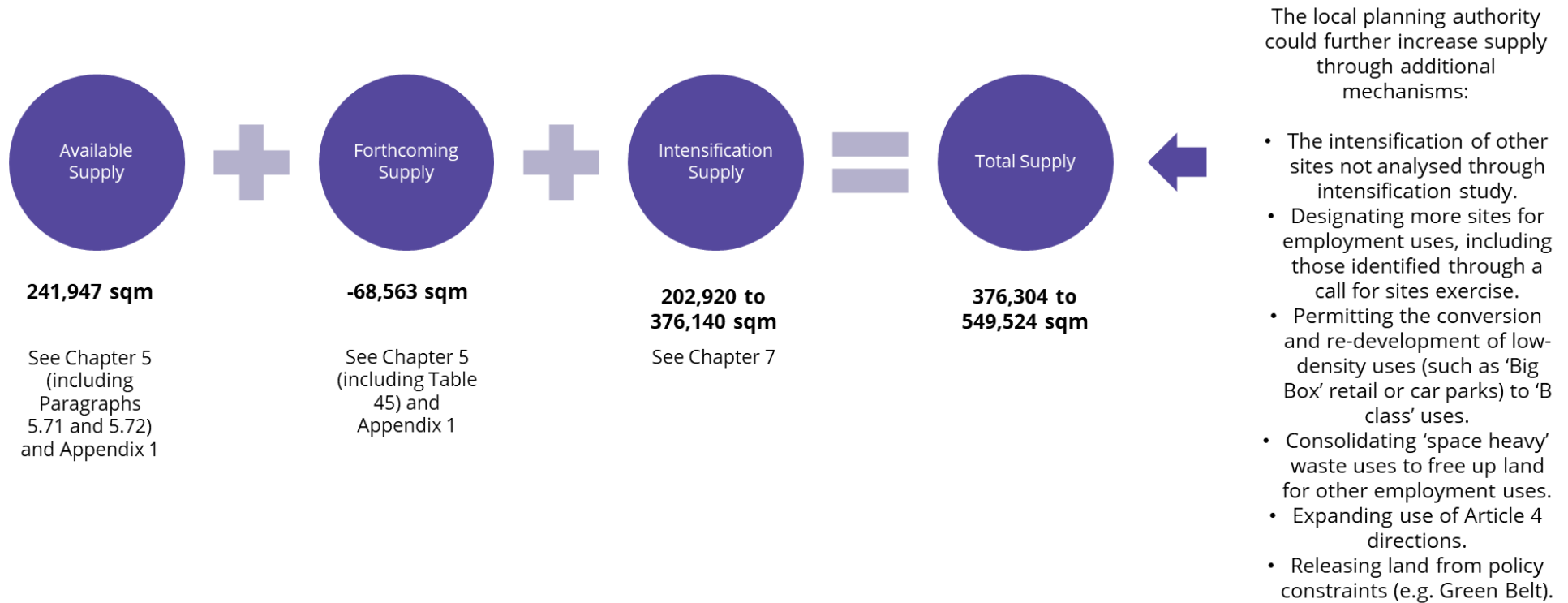


Figure 33: Sources of Supply
 Source: LBH, CoStar, Avison Young and Maccreanor Lavington, 2023

8.6 As Chapter 7 illustrates there is, however, significant potential to increase supply of available industrial-type space via intensification and/or re-development of existing employment sites. Building on the analysis presented in Chapter 5, and the typologies presented in Chapter 6, it has been calculated that there is potential to increase the amount of supply by around **+202,920 to +376,140 sqm** over the long-term. This roughly breaks down to⁴⁴:

- General Industrial (B2/EG(iii)) Floorspace: +88,480 to 58,200 sqm⁴⁵.
- Warehousing (B8) Floorspace: +114,440 to +317,940 sqm.

8.7 The total figure could increase by a further +85,250 and 132,890 sqm if sensitive sites around Heathrow and RAF Northolt are intensified.

8.8 In total, using headline intensification figures, this means that across the three supply categories (a, b and c) there is potential for c.**376,304-549,524** sqm of employment floorspace supply in Hillingdon over the long-term as set out in the table below. This breaks down to:

- 121,157 sqm of office (EG(i)/(ii)) floorspace.
- 82,705 to 52,425 sqm of general industrial (B2/EG(iii)) floorspace.
- 172,442 to 375,942 sqm of warehousing (B8) floorspace.

Table 49 Hillingdon's Employment Floorspace Supply (SQM)

	Office (EG(i)/(ii))	General Industrial (B2/EG(iii)) Floorspace	Warehousing (B8) floorspace
Employment Floorspace Currently Available	190,654	18,705	32,588
Extant, Unimplemented and/or In-Progress Planning Applications	-69,497	-24,480	25,414
Short-to-Medium Term Supply	121,157	-5,775	58,002
Intensification of Existing Employment Areas	N/A	88,480 to 58,200	114,440 to 317,940
Long Term Supply	121,157	82,705 to 52,425	172,442 to 375,942

Source: Co-Star, LBH, Avison Young, Maccreanor Lavington

8.9 While these figures have been compiled in line with best practice for studies of this nature, they should be read with some caution. This is because:

- Even though a building may have some floorspace availability it may not be suitable to meet demand due to limitations around quality, format, location, connectivity and other factors that modern-occupiers require.
- Even if a site has a planning consent it is not guaranteed that the floorspace changes that are anticipated will come forward as not all schemes given planning permission are built out. This is particularly the case at present given high interest rates and the fluctuating economy.
- Achieving the uplift that is possible via intensification is challenging and based on a number of assumptions, calculations and parameters. Policy and practice will need to align to unlock some of the opportunities this presents.

⁴⁴ It is difficult to break the total figures down by use class as some typologies have a mix of industrial uses, or can be adapted to provide general industrial or warehousing depending on the size of unit that comes forward, but a use class has been ascribed to the dominant typology to inform the demand-supply balance calculations.

⁴⁵ While it does not seem intuitive, these two figures are purposely written in this order with 88,480 sqm representing the 'lower intensity' option and 58,200 sqm representing the 'higher intensity' option for General Industrial (B2/EG(iii)). This is because under the 'high intensity' option several of the plots identified for General Industrial uses (B2/EG(iii)) for the 'low intensity' option have shifted to Warehousing (B8) typologies instead as these represent the most intense uses for the plot. This reflects wider trends in London where the most intense industrial developments tend to cater for warehousing and distribution uses. This also explains why there is such a dramatic increase in the Warehousing (B8) figures from the 'lower intensity' and 'higher intensity' options. These figures have been taken through the supply-demand balance in this order to be consistent with the capacity study.

Demand-Supply Dynamics

- 8.10 These supply figures are compared with the demand and need figures identified in Chapter 4 in the table below. Demand figures are taken from the recommended preferred scenario following best practice adjustments – they are based on national rather than London-level employment density guidance as the national assumptions are more reflective of commercial space and economic activity in the borough.
- 8.11 The right-hand column of the table (see Table 50) shows total employment floorspace demand versus supply. This shows that total demand (+**263,845-322,930** sqm) could be met by a combination of (a) existing available supply, (b) pipeline supply and (c) floorspace unlocked via intensification and/or re-development under both the modest and maximum intensification scenarios. Relying on existing and pipeline supply alone over the short-to-medium term would lead to a shortfall in supply as in total they only have the potential to provide **c173,384** sqm of space. This illustrates the importance of intensification and re-development activity to meet future demand and need.
- 8.12 Considering this by use class, it is clear that future demand for office floorspace (EG(i)(iii)) (**95,831-130,343** sqm) can be almost completely met by existing supply (**190,654** sqm) over the short-to-medium term despite an expected loss of over **-69,497** sqm based on current planning permissions. This means that no additional floorspace or land needs to be identified to meet the future needs of this use class.

Table 50 Hillingdon's Demand Supply Balance All Uses (2022-2038) (SQM)

	Office (EG(i)/(ii))	General Industrial (B2/EG(iii)) Floorspace	Warehousing (B8) floorspace	Total
Gross Floorspace Requirement	95,831 to 130,343	42,577 to 45,283	125,437 to 147,304	263,845 to 322,930
Employment Floorspace Currently Available	190,654	18,705	32,588	241,947
Extant, Unimplemented and/or In-Progress Planning Applications	-69,497	-24,480	25,414	-68,563
Intensification of Existing Employment Areas (Modest Intensification)	N/A	88,480	114,440	202,920
Total Demand / Supply Balance (Modest Intensification)	25,326 to -9,186	40,128 to 37,422	47,005 to 25,138	112,459
Intensification of Existing Employment Areas (Maximum Intensification)	N/A	58,200	317,940	376,140
Total Demand / Supply Balance (Maximum Intensification)	25,326 to -9,186	9,848 to 7,142	250,505 to 228,638	285,679 to 266,594
<i>Other non-intensification options to improve the demand-supply balance include, but are not limited to, (a) the intensification of other sites not analysed through intensification study, (b) designating more sites for employment uses, including those identified through a call for sites exercise, (c) permitting the conversion and re-development of low-density uses (such as 'Big Box' retail or car parks) to 'B class' uses, (d) consolidating 'space heavy' waste uses to free up land for other employment uses, (e) expanding use of Article 4 directions, and (f) releasing land from policy constraints (e.g. Green Belt). These figures should also be updated by LBH relatively regularly as they represent a 'point in time'.</i>				

Source: Co-Star, LBH, Avison Young, Maccreanor Lavington

- 8.13 Even if it did, we would not, however, recommend planning for a significant amount of additional office floorspace in Hillingdon as demand dynamics for office space are changing – just because employment is expected to grow, it does not mean that office demand will rise as it has done in the past as the relationship between the two variables has begun to change in recent years. Similarly, high levels of existing available supply in the borough suggests that demand for office stock in the locations and format currently available has changed. This is particularly the case for Salamander Quays and the Cowley Business Park as identified in Chapter 5.

- 8.14 Due to this it is recommended that future policy focuses on supporting and promoting the right type of office stock in the right locations – this will involve consolidating office uses to the most appropriate locations. As identified in Chapter 5, the most appropriate and sequentially preferably office locations in Hillingdon are set out below.
- **Uxbridge Town Centre** is a ‘suitable’ office location but suffers from high vacancy rates indicating a need to diversify and re-orient the stock to better serve occupier needs *and* the town centre. This will require the area’s designation to change from an Office Growth Location to something more flexible that allows (a) existing stock to be upgraded, (b) other ‘B-class’ employment uses to be introduced, and (c) other employment and residential uses that could enhance the employment offer to be considered. This needs to be carefully planned through the on-going *Uxbridge Town Centre Masterplan*.
 - **Stockley Park** is a ‘suitable’ office location that is identified in the *London Plan* as a location where consolidation and/or extension of office space should take place. Again, it suffers from high vacancy rates indicating a need to evolve the commercial and wider place-based ‘offer’ to reflect changing modern office occupier requirements. This will need to be planned for via a joint masterplanning exercise between LBH and the various landowners of Stockley Park.
- 8.15 Places that are less suitable could be re-purposed for other employment uses as out in Chapter 5 and Chapter 7 or, if not suitable for alternative (former) B class employment generating activity, be considered for non-B class uses.
- 8.16 Table 50 also sets out that future demand for general industrial (B2/EG(iii)) (+**42,577-45,283** sqm) will *not* be met by existing and pipeline supply, as the planning pipeline is expected to reduce overall supply. It could, however, be met through intensification and/or re-development of existing sites.
- 8.17 This is also the case for warehousing (B8) (+**125,437-147,304** sqm) which is expected to see floorspace supply of 58,002 sqm over the short-to-medium term, but requires industrial intensification to meet high levels of identified demand and need. This demand and need can be comfortably met under the modest intensification scenario. If this scenario comes forward there is potential to use some of this supply to meet demand for general industrial (B2/EG(iii)) as the typologies are flexible and some can be used for either land use type depending on the configuration of the building that comes forward.
- 8.18 The demand-supply position for general industrial (B2/EG(iii)) and warehousing (B8) is therefore highly contingent on achieving intensification and re-development across existing employment sites, though not all opportunity sites and plots need to come forward to meet future demand and need as collectively they have the potential to deliver a surplus of space under both the modest and maximum scenarios.
- 8.19 To achieve intensification and re-development at scale will, however, be challenging and require policy to support and promote intensification on sites that present opportunities. Drawing on Chapters 5, 6 and 7, the table below identifies the relevant sites and includes recommendations about which should be designated in the refreshed Local Plan. This will need to be supported by the protection of industrial and waste uses at Newyears Green Lane.

Table 51 Sites Presenting Intensification and/or Re-development Opportunities

Site	Classification	Description	Intensification/ Uplift Plots ⁴⁶	Uplift Potential	Policy Recommendation
Covert Farm, including extension	Remain and re-orient	A well-utilised, occupied and fit-for-purpose employment site dominated by distribution activity. Presents one opportunity plot on site for intensification, as well a large vacant car park adjacent to the site that could be better utilised for employment-related uses.	Scylla Road, Stanwell Road	Non Sensitive Plots: 46,683-70,024 sqm	Retain as designated industrial site and extend designation to cover extension and vacant car park
Southern Perimeter Road	Remain, limited intensification opportunities	A unique site that sits within Heathrow's boundary that is primarily used for cargo, freight and distribution activity. While there are opportunities for intensification the site is highly sensitive given its 'on airport' location and is protected for its existing uses.	Southampton Road	Sensitive Plots ⁴⁷ : 8,160-12,946 sqm	N/A
Hatton Cross	Remain and intensify	Like Southern Perimeter Road the site sits within Heathrow's boundary and is primarily used for British Airway's operations. Again, while intensification is possible the site is highly sensitive and is protected for airport related uses. There is, however, one plot <i>outside</i> the airport boundary that presents opportunities for intensification.	Envoy Avenue, Cranford Lane, Viscount Way	Non Sensitive Plots: 833-1,983 sqm Sensitive Plots: 55,505-83,258 sqm	Consider designation as industrial site
South of Bath Road	Remain and intensify	The site is dominated by car rentals and surface level car parks serving Heathrow. There is potential to better use the space to unlock employment floorspace and this will be attractive given strong value sets in the area. There is also a vacant plot to the east which could be intensified to deliver employment floorspace uplift.	Hatton Road, Bath Road, Northern Perimeter Road	Non Sensitive Plots: 45,830-67,835 sqm	Consider designation as industrial site and extend designation to cover vacant plot to the east
North of Bath Road	Remain and re-orient	The western area is industrial in nature and benefits from well-occupied and fit-for-purpose industrial units. The eastern part of the site, however, has a mix of uses including a hotel and a small office park. The office park element has vacancies and is inefficiently used so presents opportunities for re-development providing more intense and in-demand industrial uses.	Heathrow Boulevard	Non Sensitive Plots: 4,090-14,068 sqm	Designate for industrial uses
Hayes Industrial Area	Intensify and re-orient	A large site consisting of a number of sub-areas and sites of different sizes, characteristics and ages. Several opportunity plots have been identified across the area that could be better utilised to increase employment floorspace.	Horton Road, Iron Bridge Road South, Rigby Lane W, Rigby Lane E, Dawley Road, Swallowfield Way	Non Sensitive Plots: 42,831 sqm-84,502 sqm	Designate for industrial uses
North Uxbridge Industrial Estate	Remain, re-orient and intensify	A modern and well-occupied industrial park that should be retained and protected. Includes a number of office blocks which are currently or likely to face vacancy challenges in the future that could be re-developed to provide more in-demand industrial uses. There is a vacant plot to the north east of the site that could also be intensified to unlock additional employment space.	Oxford Road, St John's Way, Florence Way	Non Sensitive Plots: 23,069-42,221 sqm	Retain as designated industrial site

⁴⁶ See Annex 3 for more information.⁴⁷ Sensitive plots have not been included in total uplift figures given they are located on restricted airport sites.

Site	Classification	Description	Intensification/ Uplift Plots ⁴⁶	Uplift Potential	Policy Recommendation
Uxbridge Industrial Estate	Intensify and re-orient	A large and important industrial estate home to a wide range of industrial occupiers, as well as some office occupiers. Has some opportunities for intensification within industrial areas which could together deliver a significant uplift in employment floorspace. Office areas to the south are in the process of being lost for residential uses.	Arundel Road, Wallingford Road W, Wallingford Road E, River Colne, Salisbury Road, Eskdale Road, Ashley Road	Non Sensitive Plots: 13,691 – 51,672 sqm	Retain as designated industrial site
RAF Northolt	Remain, limited intensification opportunities	A fit-for-purpose site that directly supports activity at the airport. There are plots that could be intensified by these are sensitive and restricted due to their position within the airport boundary. Security is a particular concern at this location given the royal and military role of the airfield.	Western Avenue	Sensitive Plots: 21,582-36,689 sqm	N/A
Stonefield Way/Victoria Road	Remain and intensify	A large industrial area bounded by retail and residential areas. There are few opportunities for intensification, though there are a small number of plots where stock is old, single-storey and/or vacant and could be better organised.	Field End Road	Non Sensitive Plots: 11,432-13,161 sqm	Retain as designated industrial site
Braintree Road	Remain and intensify	A light industrial areas that is functioning well, densely developed and performs an important local economic function. There are few opportunities for intensification but there are pockets of old and dated stock that could be developed and intensified.	Tiptree Road	Non Sensitive Plots: 1,074-8,111 sqm	Retain as designated industrial site
Odyssey Business Park	Re-orient	A purpose-built office park that is facing vacancy challenges given the changing nature of office occupier demand. Presents opportunities for re-orientation to better meet occupier demand. This could include office occupiers but also light industrial occupiers as well, given the sites proximity to the strategic road network.	Odyssey Business Park	Non Sensitive Plots: 10,904-14,592 sqm	Remain designated but introduce flexibilities over employment uses
Summerhouse Lane / Salamander Quay	Remain and re-orient	Despite its detached and difficult-to-access location the light industrial uses at Summerhouse Lane are modern and well-occupied. The office blocks at Salamander Quay, however, face vacancy challenges and likely to continue to do so given changing occupier expectations. The site could be re-developed to provide alternative industrial type accommodation.	Park Lane	Non Sensitive Plots: 2,484-6,970 sqm	Remain designated but introduce flexibilities over uses in Salamander Quay area

Strategic Recommendations

Achieving Industrial Intensification

- 8.20 The demand-supply position set out above clearly illustrates that industrial intensification is required to meet future demand for general industrial (B2/EG(iii)) and warehousing (B8) uses in Hillingdon. Not all the intensification opportunities identified in Chapter 7 need to come forward to meet objectively assessed need but achieving the 'modest' scenario will be necessary.
- 8.21 Drawing on the analysis presented in Chapter 7 and Annex 3, the areas that present the greatest opportunities for intensification are:
- Covert Farm, Heathrow Cluster.
 - South of Bath Road, Heathrow Cluster.
 - Hayes Industrial Area, Hayes Cluster.
 - North Uxbridge Industrial Estate, Uxbridge Cluster.
 - Uxbridge Industrial Estate, Uxbridge Cluster.
- 8.22 These areas should be prioritised for intensification in both policy and practice. Achieving intensification at the scale required will require active intervention as policy alone is likely to be insufficient to realise the levels of change needed over the Local Plan period.
- 8.23 To encourage intensification to come forward on these sites we would recommend:
1. Writing clear planning policies that encourage intensification. A new type of designation could be created such as an 'Industrial Intensification Area', similar to the borough's old 'Office Growth Area' designation. This would help set out a clear policy position and indication of the type of development activity that will be supported by LBH in these areas.
 2. Developing delivery-oriented site-based masterplans to identify in more detail which plots can be intensified within these areas and to provide more granular detail of what is suitable to come forward. These could be adopted as Supplementary Planning Documents to help guide and encourage development activity in each area.
 3. Creating delivery plans alongside the site-based masterplans to identify different levers that LBH could employ to encourage and support intensification activity. This should consider a wide range of options from land assembly through to providing low interest loans to developers to help address viability challenges. It should also set out how LBH will *directly* help interested parties to deliver intensification schemes – for example:
 - On publicly owned land this could involve working with the GLA to jointly invest and bring forward schemes like Industria.
 - On privately owned land it could involve jointly investing in schemes with developers to encourage investment and reduce developers' risk in bringing forward these relatively novel typologies.
- 8.24 Other sites can be considered for the steps outlined above but it is prudent to prioritise areas with the greatest opportunities given LBH has limited resources.

Looking Beyond Industrial Intensification

- 8.25 It is, however, recognised that relying on intensification and re-development alone to meet demand will be difficult as it is a complex process that is relatively unproven as a borough-wide strategy to meeting identified demand and need. For example:
- **Novel Typologies:** While industrial intensification schemes have started to come forward across London (e.g. Industria, X2, Bloom Hackney) it is still a relatively novel concept and is a long way from becoming the norm across the city. There is some way to go before developers, occupiers and agents consider it a default option and this, in part, links to the challenging viability position.

- **Delivery Phasing:** Unlike traditional ground floor industrial estates, intensified typologies are difficult to deliver in a phased way. This is challenging as industrial developers generally prefer to release units progressively to test market demand and ensure they do not oversupply the market. This impacts the attractiveness of intensified typologies to more traditional industrial developers.
- **Economic Diversity:** A major strength of the borough's economy is its diversity and the fact it accommodates a range of businesses across a spectrum of locations and site types. Without targeted action, intensification could erode this diversity if smaller and more affordable sites are re-developed for larger, more modern and expensive units.
- **Infrastructure Requirements:** Delivering additional industrial capacity will impact infrastructure networks such as power, water and roads. More detailed infrastructure studies will therefore be required as part of any masterplanning work to identify whether any upgrades or improvements to local infrastructure are needed to enable intensification activity.

8.26 Due to these challenges it is recommended that while industrial intensification *should* be pursued as a long-term strategy, it would be risky to rely on it as the sole mechanism to meet future demand and need. Other mechanisms therefore could be considered over the short-to-medium term to meet future demand and need as part of the refreshed Local Plan. Typical options include:

- Designating more sites for employment uses, including those identified through a call for sites exercise.
- Permitting the conversion and re-development of low-density commercial uses (such as 'Big Box' retail or car parks) to 'B class' uses.
- Consolidating 'space heavy' uses (e.g. waste and recycling facilities) to smaller and more efficient sites unlocking them for development.
- Expanding use of Article 4 directions.
- Releasing greenbelt land from policy constraints (e.g. Green Belt).
- Allocating suitable opportunity sites not currently in employment use for employment-led development.

8.27 Officers should also monitor land use patterns and update this report regularly as and when sites come forward for employment uses. Sites that have been excluded from this study, but are understood to be of interest from an employment development perspective, include but are not limited to:

- Vacant/underutilised car park associated with Raddison Blu Edwardian Hotel on Bath Road.
- Thistle Hotel Heathrow Terminal 5 on Bath Road.
- Cardinal Point vacant storage area on Bath Road.
- Merck Sharpe Dohme (MSD) site on Breakspear Road South.

8.28 While it is not recommended that these mechanisms are employed *instead* of pursuing intensification, it is recognised that collectively the different levers have the potential to more than meet demand and need over the short-, medium- and long-term.

Enabling Office Consolidation

8.29 Unlike industrial uses the demand-supply position illustrates that no additional supply is required to meet future demand for office floorspace (EG(i)(iii)) in Hillingdon – it is therefore *not* recommended that additional office floorspace is planned for. Due to the changing nature of occupier demand it *is* however recommended that future policy supports the consolidation of office uses to Uxbridge Town Centre and Stockley Park as they are the most appropriate, attractive and sequentially preferable office locations in Hillingdon.

8.30 Similarly to industrial intensification, it is recommended that planning policies are introduced to highlight these locations as the borough's preferred office areas. The focus, however, should *not* be on increasing the quantum of office floorspace but rather on (a) *improving* the floorspace that already exists, and (b) encouraging office owners in other parts of the borough to relocate occupiers to these locations if they re-purpose and/or re-develop their sites. This will help retain occupiers in the borough and support economic development.

- 8.31 In terms of managing the repurposing of existing office stock for other uses a criteria-based approach should be incorporated into the Local Plan to ensure only stock that is genuinely not fit for purpose is lost. Key considerations for this policy should include the quality of space, environmental performance, location, accessibility, parking provision, marketing history and viability of retrofit.
- 8.32 Where office buildings are being re-purposed or converted to other uses policies could set out a requirement for applicants to produce Business Relocation Strategies. Guidance should be provided on what these should include, with a focus on identifying and supporting occupiers to access the right type of office space in the preferred office locations. Ideally LBH will be actively involved in shaping these strategies and will support owners and occupiers by playing a strategic brokerage role with other asset owners and agents.
- 8.33 Where office buildings are being re-developed for other uses by landowners, policies could be introduced to capture some of the value being created. This could be reinvested into office improvement and refurbishment schemes in the preferred locations, or to support and incentivise occupiers to move to these areas. The ambition should be to use any income to make the preferred locations more attractive and viable for occupiers to base themselves in order to maintain the borough's local economy.
- 8.34 Beyond policy it is also recommended that LBH undertake delivery-focused masterplanning work to enhance the preferred locations for office occupiers. This type of work is already underway for Uxbridge Town Centre, but a similar exercise should be undertaken with landowners at Stockley Park to help the area develop a more diverse and varied offer that meets the demands of modern-day occupiers. This should again be delivery-oriented with a focus on land use, design and landscape. It should identify what broad parameters are acceptable for the future of the Park to guide the investments of freeholders, and it should be developed in a way to inform the Local Plan.

Appendix 1: Vacancy and Unimplemented Planning Application Records

Vacancy Records

Surveyed Sites							
Cluster	Site	Designation	Building Name	Address	Use Class	Total Availability (Sq Ft)	Total Availability (Sqm)
Hayes Corridor	Hayes Industrial Area	SIL	DC7 Prologis Park Dawley Road	Prologis Park, Dawley Road, Vinyl Place, Hayes, UB3 1HH	Warehousing B8	29,696	2,759
Hayes Corridor	Hayes Industrial Area	SIL	Unit 9, Silverdale Road	Hayes, Silverdale Rd, Hayes, UB3 3BN	Warehousing B8	24,444	2,271
Hayes Corridor	Hayes Industrial Area	SIL	Unit 1 Horton Industrial Park	Horton Road, West Drayton, UB7 8JD	General Industrial (B2/EG(iii)).	23,166	2,152
Hayes Corridor	Hayes Industrial Area	SIL	Gethceln House	Dawley Road, Hayes, UB3 1EH	General Industrial (B2/EG(iii)).	19,574	1,818
Hayes Corridor	Hayes Industrial Area	SIL	Pasadena Close (Unit 4&5)	Pasadena Close, Hayes, UB3 3NQ	Warehousing B8	13,762	1,279
Hayes Corridor	Hayes Industrial Area	SIL	Unit 361-363 Stockley Close	361 Stockley Close, West Drayton UB7 9BL	Warehousing B8	10,764	1,000
Hayes Corridor	Hayes Industrial Area	SIL	508 Stone Close, Horton Industrial Estate	Horton Industrial Estate, 508 Stone Cl, West Drayton UB7 8JU	General Industrial (B2/EG(iii)).	9,439	877
Hayes Corridor	Hayes Industrial Area	SIL	Unit 4 (Horton Industrial Park)	Unit 4, Horton Industrial Park, West Drayton, UB7 8JD	General Industrial (B2/EG(iii)).	16,772	1,558
Hayes Corridor	Hayes Industrial Area	SIL	Unit 1 Providen Industrial Estate	Unit 1, Providen Industrial Estate, Pump Lane, Hayes, UB3 3NE	Warehousing B8	6,975	648
Hayes Corridor	Hayes Industrial Area	SIL	Unit 11, unit 15, unit 17 (Warnford Business Centre)	Warnford Business Centre, Clayton Road, Hayes, UB3 1BQ	Warehousing B8	4964	461
Hayes Corridor	Hayes Industrial Area	SIL	Unit 8 Argent Centre	Argent Trade Park, Pump	General Industrial (B2/EG(iii)).	4,085	380

Hayes Corridor	Hayes Industrial Area	SIL	Unit 4 (Warnford Business Centre)	Lane, Hayes, UB3 3NB Warnford Business Centre, Clayton Road, Hayes, UB3 1BQ	Warehousing B8	2,556	237
Hayes Corridor	Hayes Industrial Area	SIL	Unit 12, Chesterfield Way	Unit 12, Chesterfield Way, Hayes, UB3 3NW	Warehousing B8	2,088	194
Hayes Corridor	Hayes Industrial Area	SIL	Unit 17, Abenglen Industrial Estate	Abenglen Industrial Estate, Betam Road, Dawley Road, Hayes, UB3 1SR	Warehousing B8	1,094	102
Hayes Corridor	Packet Boat Lane	LSIS	Unit 3, Packet Boat Lane	Tomo Industrial Estate, Cowley, Uxbridge, UB8 2JP	Warehouse B8	22,025	2,046
Uxbridge	North Uxbridge Industrial Estate	SIL	Hunton House	2nd Floor Hunton House, Oxford Road, Uxbridge, UB8 1LX	Office (EG(i)/(ii))	8,272	768
Uxbridge	North Uxbridge Industrial Estate	SIL	Regus House	Oxford Rd, Uxbridge, UB8 1HR	Office (EG(i)/(ii))	16,375	1,521
Uxbridge	North Uxbridge Industrial Estate	SIL	Unit D & E Riverside Way	Riverside Way Uxbridge, UB8 2YF	Warehousing B8	20835	1,936
Uxbridge	North Uxbridge Industrial Estate	SIL	Unit 25 Riverside Way	Riverside Way Uxbridge, UB8 2YF	Warehousing B8	22,431	2,084
Ruislip	Stonefield Way / Victoria Way	SIL	Unit 5 Sperrin Business Centre	Unit 5 Sperrin Business Centre, Stonefield Way, Ruislip, HA4 0BG	Warehousing B8	4,546	422
Uxbridge	Uxbridge Industrial Estate	SIL	Blake House	Cowley Business Park, Uxbridge, UB8 2AD	Office (EG(i)/(ii))	30,457	2,830
Uxbridge	Uxbridge Industrial Estate	SIL	Swan House	Cowley Business Park, Uxbridge, UB8 2AD	Office (EG(i)/(ii))	20,772	1,930
Uxbridge	Uxbridge Industrial Estate	SIL	The Zone	The Zone, Cowley Business Park, Uxbridge, UB8 2AD	Office (EG(i)/(ii))	18,454	1,714
Uxbridge	Uxbridge Industrial Estate	SIL	Brook Business Centre, Cowley Mill Road	1 Brook Business Centre, Cowley Mill	Office (EG(i)/(ii))	1,274	118

				Road, Uxbridge, Middx, UB8 2FX			
Uxbridge	Uxbridge Industrial Estate	SIL	Unit F, Eskdale Road Industrial Estate	Eskdale Road Industrial Estate, Uxbridge, UB82RT	Warehousing B8	8,836	821
Uxbridge	Uxbridge Industrial Estate	SIL	Units 2, Chiltern Business Centre	Units 2, Chiltern Business Centre, Arundel Way, Uxbridge, UB8 2SN	General Industrial (B2/EG(iii)).	6,155	572
Uxbridge	Uxbridge Industrial Estate	SIL	Unit 7, Cowley Mill Trading Estate	Unit 7 Cowley Mill Trading Estate, Longbridge Way, Uxbridge, UB8 2YG	Warehousing B8	5,922	550
Uxbridge	Uxbridge Industrial Estate	SIL	Unit E, Eskdale Road Industrial Estate	Unit E, Eskdale Road Industrial Estate, Uxbridge UB8 2RT	Warehousing B8	4,683	435
Uxbridge	Uxbridge Industrial Estate	SIL	Unit 4, Trade City Business Park	Unit 4, Trade City Business Park, Uxbridge, UB8 2DB	Warehousing B8	2,778	258
Uxbridge	Uxbridge Industrial Estate	SIL	Progress House, Eskdale Road	Progress House, Eskdale Road, Uxbridge, UB8 2RT	Office (EG(i)/(ii))	1,475	137
Uxbridge	Uxbridge Industrial Estate	SIL	22 Sarum Complex	22 Sarum Complex, Salisbury Road, Uxbridge, UB8 2RZ	Office (EG(i)/(ii))	998	93
Stockley Park 'Office Area'	Stockley Park	LSEL	3 The Square - Longwalk Rd	Stockley Park, Uxbridge, Middlesex, UB11 1AW	Office (EG(i)/(ii))	108,256	10,057
Stockley Park 'Office Area'	Stockley Park	LSEL	6-9 The Square	Stockley Park, Uxbridge, Middlesex, UB11 1FW	Office (EG(i)/(ii))	100,000	9,290
Stockley Park 'Office Area'	Stockley Park	LSEL	3 The Square	Stockley Park, Uxbridge, Middlesex, UB11 1ET	Office (EG(i)/(ii))	92,283	8,573
Stockley Park 'Office Area'	Stockley Park	LSEL	1 Longwalk Rd	Stockley Park, Uxbridge,	Office (EG(i)/(ii))	72,100	6,698

				Middlesex, UB11 1DB			
Stockley Park 'Office Area'	Stockley Park	LSEL	5 The Square	Stockley Park, Uxbridge, Middlesex, UB11 1ET	Office (EG(i)/(ii))	57,668	5,357
Stockley Park 'Office Area'	Stockley Park	LSEL	6 Roundwood Ave	Stockley Park, Uxbridge, Middlesex, UB11 1JA	Office (EG(i)/(ii))	52,399	4,868
Stockley Park 'Office Area'	Stockley Park	LSEL	3 Furzeground Way	Stockley Park, Uxbridge, Middlesex, UB11 1EZ	Office (EG(i)/(ii))	50,038	4,649
Stockley Park 'Office Area'	Stockley Park	LSEL	4 Longwalk Rd	Stockley Park, Uxbridge, Middlesex, UB11 1FE	Office (EG(i)/(ii))	35,397	3,288
Stockley Park 'Office Area'	Stockley Park	LSEL	2 The Square	Stockley Park, Uxbridge, Middlesex, UB11 1AD	Office (EG(i)/(ii))	33,540	3,116
Stockley Park 'Office Area'	Stockley Park	LSEL	Union Stockley Park - 1 Furzeground Way	Stockley Park, Uxbridge, Middlesex, UB11 1EZ	Office (EG(i)/(ii))	22,477	2,088
Stockley Park 'Office Area'	Stockley Park	LSEL	1 Roundwood Av	Stockley Park, Uxbridge, Middlesex, UB11 1AF	Office (EG(i)/(ii))	19,431	1,805
North Hillingdon	Summerhouse / Salamander Quey	LSEL	Linden House, Harefield	Linden Square, Harefield, Middlesex, UB9 6TQ	Office (EG(i)/(ii))	6,472	601
Ruislip	Odyssey Business Park	LSEL	Apollo House, Odyssey Park	Odyssey Business Park, Ruislip, HA4 6QF	Office (EG(i)/(ii))	22,060	2,049
Ruislip	Odyssey Business Park	LSEL	Anteros House, Odyssey Park	Odyssey Business Park, Ruislip, HA4 6QF	Office (EG(i)/(ii))	13,800	1,282
Hayes Corridor	Packet Boat Lane	LSIS	Unit 7 Zodiac Business Park	Unit 7 Zodiac Business Park, Uxbridge, UB8 2GU	Warehousing B8	7,369	685
Hayes Corridor	Packet Boat Lane	LSIS	Unit C Enterprise House Tomo Trading Estate	Unit C Enterprise House Tomo Trading Estate, Packet Boat	Warehousing B8	4,952	460

				Lane, Uxbridge, UB8 2JP			
Heathrow	South Perimeter Road	Non-Designated	Heathrow Cargo Centre - Building 575-583	Unit 575-583 Sandringham Rd, Hounslow TW6 3SL	Warehousing B8	11,513	1,070
Heathrow	North of Bath Road	Non-Designated	Heathrow Boulevard 1	1, 286 Heathrow Blvd, Bath Rd, Sipson, West Drayton UB7 0DQ	Office (EG(i)/(ii))	18,958	1,761
Heathrow	North of Bath Road	Non-Designated	Heathrow Boulevard 2	Building 2, 284 Heathrow Blvd, Bath Rd, Sipson, West Drayton UB7 0DQ	Office (EG(i)/(ii))	8,900	827
Heathrow	North of Bath Road	Non-Designated	Heathrow Boulevard 4	280 Heathrow Blvd, Bath Rd, Harmondsworth, Sipson, West Drayton UB7 0DQ	Office (EG(i)/(ii))	15,197	1,412
Heathrow	North of Bath Road	Non-Designated	Heathrow Boulevard 3	282 Bath Rd, Sipson, West Drayton UB7 0DQ	Office (EG(i)/(ii))	4,014	373
Heathrow	North of Bath Road	Non-Designated	Heathrow Boulevard 5	286 Heathrow Blvd, Bath Rd, Sipson, West Drayton UB7 0DQ	Office (EG(i)/(ii))	8,352	776
Heathrow	North of Colnbrook By-Pass	Non-Designated	Summit Centre	Skyport Dr, Summit Centre, West Drayton Middlesex, UB7 0LB	Warehousing B8	34,247	3,182
Hayes Corridor	South of Mayfields Lake	Non-Designated	The Common (Timber Yard)	Riverview, Donkey Lane, West Drayton, UB7 7HQ	Warehousing B8	40,000	3,716
Uxbridge	Uxbridge TC	Office Growth Locations	The Charter Building	Vine Street, Uxbridge, UB8 1JG	Office (EG(i)/(ii))	91,632	8,513
Uxbridge	Uxbridge TC	Office Growth Locations	The Quays	Office - Hillingdon Submarket, Uxbridge, UB8 1LZ	Office (EG(i)/(ii))	86,759	8,060

Uxbridge	Uxbridge TC	Office Growth Locations	Belmont House	Belmont Street, Uxbridge, UB8 1QT	Office (EG(i)/(ii))	80,134	7,445
Uxbridge	Uxbridge TC	Office Growth Locations	Hertz House	Vine Street, Uxbridge, UB8 1QE	Office (EG(i)/(ii))	69,220	6,431
Uxbridge	Uxbridge TC	Office Growth Locations	The Atrium	1 Harefield Road, Uxbridge, UB8 1EX	Office (EG(i)/(ii))	63,530	5,902
Uxbridge	Uxbridge TC	Office Growth Locations	Parkview	Oxford Rd, Parkview, Uxbridge, UB8 1HU	Office (EG(i)/(ii))	47,726	4,434
Uxbridge	Uxbridge TC	Office Growth Locations	Pemberton House	2 Bakers Road, Pemberton House, Uxbridge, UB8 1SS	Office (EG(i)/(ii))	32,185	2,990
Uxbridge	Uxbridge TC	Office Growth Locations	Harman House	1 George Street, Harman House, Uxbridge, UB8 1QQ	Office (EG(i)/(ii))	24,852	2,309
Uxbridge	Uxbridge TC	Office Growth Locations	Beaufort House	Cricket Field Road, Beauford House, Uxbridge, UB8 1QG	Office (EG(i)/(ii))	13,104	1,217
Uxbridge	Uxbridge TC	Office Growth Locations	Belmont Chambers	149 Belmont Road, Belmont House, Uxbridge, UB8 1QT	Office (EG(i)/(ii))	8,903	827
Uxbridge	Uxbridge TC	Office Growth Locations	Beasley Court	3 Warwick Place, Beasley Court, Uxbridge, UB8 1PE	Office (EG(i)/(ii))	8,064	749
Uxbridge	Uxbridge TC	Office Growth Locations	1 York Road	1 York Road, Uxbridge, UB8 1RN	Office (EG(i)/(ii))	7,378	685
Uxbridge	Uxbridge TC	Office Growth Locations	Bakers House	25-26 Bakers Road - Bakers House, Uxbridge, UB8 1RG	Office (EG(i)/(ii))	7,324	680
Uxbridge	Uxbridge TC	Office Growth Locations	Union House	2 Vine Street, Uxbridge, UB8 1QE	Office (EG(i)/(ii))	5,346	497
Uxbridge	Uxbridge TC	Office Growth Locations	Hill House	118 High Street, Uxbridge, UB8 1JT	Office (EG(i)/(ii))	4,460	414

Uxbridge	Uxbridge TC	Office Growth Locations	Capital Court	27-31 Windsor Street, Uxbridge, UB8 1AB	Office (EG(i)/(ii))	3,448	320
Uxbridge	Uxbridge TC	Office Growth Locations	123 High Street	124 High Street, Uxbridge, UB8 1JT	Office (EG(i)/(ii))	2,933	272
Uxbridge	Uxbridge TC	Office Growth Locations	268-270 High Street	268-270 High Street, Uxbridge, UB8 1LQ	Office (EG(i)/(ii))	2,488	231
Uxbridge	Uxbridge TC	Office Growth Locations	Highbridge House	2nd Floor, Highbridge House, 93-96 Oxford Road, Uxbridge, UB8 1LU	Office (EG(i)/(ii))	1,688	157
Uxbridge	Uxbridge TC	Office Growth Locations	Market House	High Street, Uxbridge, UB8 1JN	Office (EG(i)/(ii))	1,024	95
GRAND TOTAL						1,767,288	164,185
Total Office (EG(i)/(ii))						1,401,617	130,213
Total General Industrial (B2/EG(iii))						79,191	7,357
Total Warehousing (B8)						286,480	26,615
RECORDS WITH UNIMPLEMENTED PLANNING PERMISSION							
Uxbridge	North Uxbridge Industrial Estate	SIL	Waterside House	20 Riverside Way, Uxbridge, UB8 2YF	Office (EG(i)/(ii))	10,179	946
Uxbridge	North Uxbridge Industrial Estate	SIL	Waterside House	20 Riverside Way, Uxbridge, UB8 2YF	Office (EG(i)/(ii))	813	76

Source: Evidence collected from CoStar in mid-2023. Avison Young 'cleaned' this data by removing records that also have unimplemented planning permission to avoid double counting and have removed records that agents report to have been let already. These records represent a 'point in time' and will need to be updated regularly to provide an up-to-date demand-supply balance.

Unsurveyed Sites							
Location	Building Name	Address	Use Class	Total Availability (Sq Ft)	Total Availability (Sqm)		
West Drayton	Drayton Coal Depot	Tavistock Road, West Drayton, UB7 7QT	General Industrial (B2/EG(iii))	122,150	11,348		
Hayes	Unit 7 Viveash Close	Unit 7 Squirrels Trading, Estate, Viveash Close, Hayes, UB3 4RZ	Warehouse B8	1,718	160		
Hayes	Unit 29-31 Fairview Business Centre	Unit 29-31 Fairview Business Centre, Clayton Road, Hayes, UB3 1AN	Warehouse B8	29,007	2,695		

Hayes	Unit 2 Segro Park	Unit 2, SEGRO Park Hayes, North Hyde Gardens, Hayes, UB3 4QR	Warehouse B8	24,720	2,297
Heathrow	Unit 13 Saxon Way Trading Estate	Unit 13 Saxon Way Trading Estate, Heathrow, West Drayton, UB7 0LW	Warehouse B8	8,852	822
Hayes	One Hyde Park Hayes	One Hyde Park Hayes, Hayes Hillingdon, UB3 4AZ	Office (EG(i)/(ii))	91,677	8,517
Hayes	Hayes Park South	Hayes End Road, Hayes, Greater London, UB4 8FE	Office (EG(i)/(ii))	70,370	6,538
Hayes	Hayes Park North	Hayes End Road, Hayes, Greater London, UB4 8FE	Office (EG(i)/(ii))	67,251	6,248
Hayes	The Record Store	Blyth Rd, UB3 1RY	Office (EG(i)/(ii))	64,637	6,005
Hounslow	World Business Centre 3	Heathrow Airport, Newall Rd, TW6 2TA	Office (EG(i)/(ii))	46,481	4,318
Hayes	Hayes Park Central	Hayes End Rd, UB4 8EE	Office (EG(i)/(ii))	45,940	4,268
West Drayton	Abbey House	450 Bath Rd, UB7 0EB	Office (EG(i)/(ii))	41,352	3,842
Hayes	The Shipping Building	252-254 Blyth Rd, UB3 1HA	Office (EG(i)/(ii))	35,342	3,283
Hayes	Capital Place	120 Bath Rd, UB3 5AN	Office (EG(i)/(ii))	24,528	2,279
Hounslow	World Business Centre 4	Newall Rd, TW6 2TA	Office (EG(i)/(ii))	22,622	2,102
Uxbridge	Musgrave House	Moorhall Rd, UB9 6NS	Office (EG(i)/(ii))	18,932	1,759
West Drayton	Lodge & Annex	Harmondsworth Ln, UB7 0AQ	Office (EG(i)/(ii))	14,441	1,342
Hounslow	World Business Centre 1	Newall Rd, TW6 2TA	Office (EG(i)/(ii))	14,127	1,312
Hayes	Strata House	Bath Rd, UB3 5JJ	Office (EG(i)/(ii))	11,388	1,058
West Drayton	Sovereign Court	625-635 Sipson Rd, UB7 0JE	Office (EG(i)/(ii))	10,245	952
Uxbridge	Whitewater Place	Moorhall Rd, UB9 6NS	Office (EG(i)/(ii))	10,093	938
Hayes	Aquis House	27-37 Station Rd, UB3 4DX	Office (EG(i)/(ii))	10,081	937
Hounslow	World Business Centre 2	Newall Rd, TW6 2TA	Office (EG(i)/(ii))	7,190	668
West Drayton	Aviation House	Harmondsworth Ln, UB7 0LQ	Office (EG(i)/(ii))	6,080	565
Northwood	Argyle House	Joel St, HA6 1NW	Office (EG(i)/(ii))	5,249	488
Hayes	Uxbridge House	460-464 Uxbridge Rd, UB4 0SD	Office (EG(i)/(ii))	4,851	451
Hayes	Mondial House	5 Mondial Way, UB3 5AR	Office (EG(i)/(ii))	4,745	441

Ruislip	Ferrari House	258 Field End Rd, HA4 9UU	Office (EG(i)/(ii))	4,200	390
West Drayton	Chapel House	Chapel House, 152-156 High Street, West Drayton UB7 7BE	Office (EG(i)/(ii))	3,623	337
Northwood	Zettler House	203 Pinner Rd, HA6 1BX	Office (EG(i)/(ii))	3,500	325
Uxbridge	Moorcroft	Harlington Rd, UB8 3HD	Office (EG(i)/(ii))	2,886	268
West Drayton	The Soap Factory	The Soap Factory, Britannia Court, West Drayton, Middx, UB7 7PN	Office (EG(i)/(ii))	2,450	228
Ruislip	Jebsen House	53-61 High St, HA4 7BD	Office (EG(i)/(ii))	1,490	138
Uxbridge	Newdigate Road (Harefield)	Newdigate Rd, Uxbridge, MDS UB9 6EJ	Office (EG(i)/(ii))	1,056	98
West Drayton	Stonebridge House	575-583 Bath Rd, UB7 0EW	Office (EG(i)/(ii))	1,000	93
West Drayton	Highbridge House	579a Bath Rd, UB7 0EW	Office (EG(i)/(ii))	969	90
Ruislip	Kern House	Breakspear Rd, HA4 7SQ	Office (EG(i)/(ii))	798	74
Northwood	Alexandra House	Suite 2, Alexandra House, 7 Oaklands Gate, Northwood, HA6 3AA	Office (EG(i)/(ii))	580	54
West Drayton	Old Mill House	Mill Rd, UB7 7EJ	Office (EG(i)/(ii))	413	38
GRAND TOTAL				837,034	77,762
Total Office (EG(i)/(ii))				650,587	60,441
Total General Industrial (B2/EG(iii))				122,150	11,348
Total Warehousing (B8)				64,297	5,973
RECORDS WITH UNIMPLEMENTED PLANNING PERMISSION					
Hayes	Three Hyde Park Hayes	North Hyde Rd, UB3 4AZ	Office (EG(i)/(iii))	10,528	978
Uxbridge	Chaplin House	Moorhall Rd, UB9 6NS	Office (EG(i)/(ii))	10,183	946
West Drayton	Manor Court	3 High St, UB7 0AQ	Office (EG(i)/(iii))	3,129	291

Source: Evidence collected from CoStar in mid-2023. Avison Young 'cleaned' this data by (a) removing records that also have unimplemented planning permission to avoid double counting (b) removing records that agents report to have been let already and (c) removing/adding records based on observations made during site visits. These records represent a 'point in time' and will need to be updated regularly to provide an up-to-date demand-supply balance.

Unimplemented Planning Records

Cluster	Site	Application No	Building Name	Address	Use Class	Total Change (Sq M)
N/A	N/A	10744/APP/2020/2240; 10744/APP/2020/929	Alexander House	106 Pembroke Rd, Ruislip HA4 9AA	Office (EG(i)/(ii))	-1,347
N/A	N/A	1331/APP/2019/1708; 1331/APP/2017/1883; 1331/APP/2019/2314	Former Nestle Factory	Nestlé factory, Nestles Avenue, Hayes, UB3. 4RF	Office (EG(i)/(ii))	174
N/A	N/A	1331/APP/2019/1708; 1331/APP/2017/1883; 1331/APP/2019/2314	Former Nestle Factory	Nestlé factory, Nestles Avenue, Hayes, UB3. 4RF	Warehousing	22,663
N/A	N/A	2102/APP/2018/4231	Pump Lane, Chailey Industrial Estate	Chailey industrial estate, Pump Lane, Hayes, UB3 3ND	Office (EG(i)/(ii))	39
N/A	N/A	2102/APP/2018/4231	Pump Lane, Chailey Industrial Estate	Chailey industrial estate, Pump Lane, Hayes, UB3 3ND	Office (EG(i)/(ii))	39
N/A	N/A	2102/APP/2018/4231	Pump Lane, Chailey Industrial Estate	Chailey industrial estate, Pump Lane, Hayes, UB3 3ND	General Industrial (B2/EG(iii))	-2,635
N/A	N/A	2102/APP/2018/4231	Pump Lane, Chailey Industrial Estate	Chailey industrial estate, Pump Lane, Hayes, UB3 3ND	General Industrial (B2/EG(iii))	-2,675
N/A	N/A	2102/APP/2018/4231	Pump Lane, Chailey Industrial Estate	Chailey industrial estate, Pump Lane, Hayes, UB3 3ND	Warehousing B8	-2,675
N/A	N/A	2342/APP/2021/2918	Eagle Point	Eagle Point the runway Ruislip HA4 6SE	Office (EG(i)/(ii))	-1,133
N/A	N/A	27256/APP/2017/3721	Manor Court, High Street	Manor Court High Street Harmondsworth UB7 0AQ	Office (EG(i)/(ii))	-1,048
N/A	N/A	28301/APP/2013/3104	Harefield Grove	Harefield Grove Rickmansworth Road, UB9 6JY	Office (EG(i)/(ii))	-143
Uxbridge Cluster	North Uxbridge Industrial Estate	40050/APP/2019/1865; 40050/APP/2020/1000; 40050/APP/2020/1001; 40050/APP/2020/1009; 40050/APP/2020/999	Bridge House, Waterview House, Riverview House	Bridge House, Riverview House and Waterview House Oxford Road Uxbridge UB8 1HS	Office (EG(i)/(ii))	-24,509
Uxbridge Cluster	Uxbridge Industrial Estate	45818/APP/2020/1812	Allport House	2 Cowley Business Park, Try House High Street Cowley UB8 2AL	Office (EG(i)/(ii))	-2,571
Heathrow Cluster	Covert Farm	50395/APP/2019/1943; 50395/APP/2021/1322	Bedfont Cross	Bedfont Cross Stanwell Road Feltham TW14 8NX	Office (EG(i)/(ii))	-1,840

Uxbridge Cluster	Uxbridge Industrial Estate	53180/APP/2020/518; 53180/APP/2021/1325	Waterside House, Cowley Business Park	Waterside House, Cowley Business Park High Street Cowley Uxbridge, UB8 2AL	Office (EG(i)/(ii))	-2,800
N/A	N/A	585/APP/2009/2752	St Andrew's Park, RAF Uxbridge	RAF Uxbridge Hillingdon Road Uxbridge, UB10 0RN	Office (EG(i)/(ii))	15,360
Uxbridge Cluster	Uxbridge Industrial Estate	63329/APP/2020/1811; 63329/APP/2021/1326	Otter House, Cowley Business Park	5 Cowley Business Park, Cowley, Uxbridge UB8 2AD	Office (EG(i)/(ii))	-2,000
N/A	N/A	67702/APP/2018/920	Hyde Park (HPH3)	Building 3, Hyde Park, Hayes Millington Road Hayes UB3 4AZ	Office (EG(i)/(ii))	-4,722
N/A	N/A	73238/APP/2018/1145; 73238/APP/2020/1194	Land at 3 Nestles Avenue	Land At 3, 233-236 Nestles Avenue Hayes UB3 4SB	Office (EG(i)/(ii))	2,155
N/A	N/A	73238/APP/2018/1145; 73238/APP/2020/1194	Land at 3 Nestles Avenue	Land At 3, 233-236 Nestles Avenue Hayes UB3 4SB	General Industrial (B2/EG(iii)).	-6,241
N/A	N/A	73238/APP/2018/1145; 73238/APP/2020/1194	Land at 3 Nestles Avenue	Land At 3, 233-236 Nestles Avenue Hayes UB3 4SB	Warehousing B8	-696
N/A	N/A	73955/APP/2020/139	The Crown Trading Centre	29 Clayton Rd, Hayes UB3 1DU	General Industrial (B2/EG(iii)).	-9,941
N/A	N/A	73998/APP/2020/3589	Hyde Park (HPH3)	Building 3, Hyde Park Millington Road Hayes UB3 4AZ	Office (EG(i)/(ii))	-6,454
N/A	N/A	76641/APP/2021/2959	Chaplin House	Chaplin House, Moorhall Road, Harefield, UB9 6NS	Office (EG(i)/(ii))	-4,134
N/A	N/A	76642/APP/2021/2960	Widewater Place, Norgine House	Widewater Place, Norgine House Moorhall Road Harefield UB9 6NS	Office (EG(i)/(ii))	-5,020
N/A	N/A	76643/APP/2021/2961	Widewater Place, Musgrave House	Widewater Place, Norgine House, Moorhall Road Harefield, UB9 6NS	Office (EG(i)/(ii))	-3,428
N/A	N/A	3886/APP/2020/3751	The Cottage in the Wall (Dawley Road)	The Cottage in the Wall, Dawley Rd, Hayes UB3 1EF	General Industrial (B2/EG(iii)).	-1,368
N/A	N/A	59872/APP/2012/1838	The Old Vinyl Factory Site	The Old Vinyl Factory Site Blyth Road Hayes	Office (EG(i)/(ii))	395
Hayes Cluster	Springfield Industrial Estate	38421/APP/2021/4045	Land at Tudor Works/Optimum Data Centre Beaconsfield Road	Beaconsfield Road Hayes	Warehousing B8	-6,285
Hayes Cluster	Springfield Industrial Estate	38421/APP/2021/4045	Land at Tudor Works/Optimum Data Centre Beaconsfield Road	Beaconsfield Road Hayes	General Industrial (B2/EG(iii)).	-7,245
Hayes Cluster	Springfield Industrial Estate	38421/APP/2021/4045	Land at Tudor Works/Optimum Data Centre Beaconsfield Road	Beaconsfield Road Hayes	Data Centre (Sui Generis).	39,814
N/A	N/A	38807/APP/2022/1645	Airport Bowl (Bath Road)	Airport Bowl Bath Road Harlington UB3 5AL	Office (EG(i)/(ii))	139
Hayes Cluster	Hayes Industrial Area	39207/APP/2020/2188	GSK, Stockley Park	Ironbridge Rd (Stockley Park), Uxbridge, Greater London, UB11 1BT	Office (EG(i)/(ii))	-28,314

Hayes Cluster	Hayes Industrial Area	39207/APP/2020/2188	GSK, Stockley Park	Ironbridge Rd (Stockley Park), Uxbridge, Greater London, UB11 1BT	General Industrial (B2/EG(iii)).	10,209
Hayes Cluster	Hayes Industrial Area	39207/APP/2020/2188	GSK, Stockley Park	Ironbridge Rd (Stockley Park), Uxbridge, Greater London, UB11 1BT	General Industrial (B2/EG(iii)).	10,209
Hayes Cluster	Hayes Industrial Area	39207/APP/2020/2188	GSK, Stockley Park	Ironbridge Rd (Stockley Park), Uxbridge, Greater London, UB11 1BT	Warehousing B8	10,209
Ruislip Cluster	Stonefield Way	70454/APP/2015/383	555 Stonefield Way	555 Stonefield Way, Ruislip HA4 0BG	Office (EG(i)/(ii))	2,699
Hayes Industrial Area	Hayes Industrial Area	73585/APP/2018/2484	501&504 Stone Close	501 & 504 Stone Close Yiewsley UB7 8JU	General Industrial (B2/EG(iii)).	304
Hayes Industrial Area	Hayes Industrial Area	73585/APP/2018/2484	501&504 Stone Close	502 & 504 Stone Close Yiewsley UB7 8JU	General Industrial (B2/EG(iii)).	-2,644
Hayes Industrial Area	Hayes Industrial Area	73585/APP/2018/2484	501&504 Stone Close	503 & 504 Stone Close Yiewsley UB7 8JU	Warehousing B8	304
Uxbridge Cluster	Uxbridge Industrial Estate	74891/APP/2020/1614	Barton Buildings, Uxbridge Industrial Estate	Barton Buildings, Uxbridge Industrial Estate Arundel Road Uxbridge UB8 2SN	Office (EG(i)/(ii))	-34
Uxbridge Cluster	Uxbridge Industrial Estate	74891/APP/2020/1614	Barton Buildings, Uxbridge Industrial Estate	Barton Buildings, Uxbridge Industrial Estate Arundel Road Uxbridge UB8 2SN	General Industrial (B2/EG(iii)).	-34
Uxbridge Cluster	Uxbridge Industrial Estate	74891/APP/2020/1614	Barton Buildings, Uxbridge Industrial Estate	Barton Buildings, Uxbridge Industrial Estate Arundel Road Uxbridge UB8 2SN	General Industrial (B2/EG(iii)).	-34
Uxbridge Cluster	Uxbridge Industrial Estate	74891/APP/2020/1614	Barton Buildings, Uxbridge Industrial Estate	Barton Buildings, Uxbridge Industrial Estate Arundel Road Uxbridge UB8 2SN	Warehousing B8	-34
Hayes Cluster	Hayes Industrial Area	75111/APP/2020/1955	Land at Bulls Bridge Industrial Estate/Union Park, North Hyde Gardens	Land At Bulls Bridge Industrial Estate North Hyde Gardens Hayes UB3 4QQ	Data Centre (Sui Generis).	56,000
Hayes Cluster	Hayes Industrial Area	75111/APP/2020/1955	Abbelio Gardens, Land at Bulls Bridge Industrial Estate/Union Park, North Hyde Gardens	Land At Bulls Bridge Industrial Estate North Hyde Gardens Hayes UB3 4QQ	B2	-800
Hayes Cluster	Hayes Industrial Area	75111/APP/2020/1955	RMC, Land at Bulls Bridge Industrial Estate/Union Park, North Hyde Gardens	Land At Bulls Bridge Industrial Estate North Hyde Gardens Hayes UB3 4QQ	Office (EG(i)/(ii))	-1,000
Hayes Cluster	Hayes Industrial Area	13226/APP/2018/2112	3 Bulls Bridge Centre, North Hyde Gardens	Land At Bulls Bridge Industrial Estate North Hyde Gardens Hayes UB3 4QQ	B2	-12,318
N/A	N/A	49467/APP/2022/2801	Shurgard House, Westmount Centre, Uxbridge Rd	Shurgard House, Westmount Centre Uxbridge Road Hayes UB4 0HD	Warehousing B8	1,928

GRAND TOTAL	-68,563
Total Office (EG(i)/(ii))	-69,497
Total General Industrial (B2/EG(iii))	-24,480
Total Warehousing (B8)	+25,414

Note: Evidence provided by LBH and 'cleaned' by Avison Young. The loss of Enterprise House and the former Nestle Factory has been removed from these records as they are long-term condemned buildings that have remained unlet for a long period and are not classified as 'available' by CoStar.

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