

Employment Land Audit

LB Waltham Forest
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Waltham Forest

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Note: The maps and drawings are based OS map provided by LBWF. All the graphic material across the document is indicative, and it cannot be measured.

CONTENT

1. PURPOSE OF THE REPORT	1	BEA 22 – BarretT Road	81
SCOPE OF WORK	2	Additional Sites	83
2. APPROACH	9	LBWF 7 – Norlington Road	84
Setting out the criteria Assessment	10	LBWF9 CrownLea	86
Calculating the Uplift Potential	16	LBWF 11 – Shaftesbury Court	89
3. SITE BY SITE ANALYSIS	21	LBWF 22 – Ravenswood Industrial Estate	91
Sil 1 Hall Lane	24	LBWF 36 – Skeltons Lane	93
SIL 2 – North Circular	27	Cork Tree Retail Park	96
SIL 3 – Blackhorse Road	30	SIL 1 Hall Lane	102
BEA1 – Howard Road	34	SIL 2 North Circular	108
BEA2 – Sherrin Road	37	SIL 3 Blackhorse Lane	114
BEA 5 – Etloe Road/Simonds Road	40	SIL 3 Blackhorse Lane	116
BEA 6 – Church Road	42	SIL 4 Argall Avenue	122
BEA 7 – Heybridge Way	45	SIL 4 Argall Avenue	124
BEA 9 – Sutherland Road	48	SIL 5 Rigg Approach	130
BEA 10 – Clifford Road	51	BEA 1 Howard Road	136
BEA 11 – Waltham Park Way	54	bea 2 Sherrin Road	142
BEA 12 – Justin Road/Trinity Way	56	bea 6 Church Road	148
BEA 13 – Highams Park	59	bea 6 Church Road	150
BEA 14 – Montague Road/Courtney Road		bea 12 justin road/trinity way	156
Arches	62	bea 13 Highams Par	162
BEA 15 – Temple Mills Lane	65	bea 17 Joseph Ray Road	168
BEA 16 – Cabinet Way	67	bea 18 HAINAULT	174
BEA 17 – Joseph Ray Road	69	bea 22 Barrett Road	180
BEA 18 – Hainault Road	71	4. STRATEGIC CONSIDERATIONS	189
BEA 19 – Hatherley Mews	73	Considerations & recommendations	190
BEA 20 – Lancaster Road Arches	76	INDUSTRIAL intensification sites	200
BEA 21 – East London Office Centre	79	INDUSTRIAL intensification sites	202

1. PURPOSE OF THE REPORT

1.1 PURPOSE OF REPORT

SCOPE OF WORK

Avison Young and Maccreanor Lavington Architects have been instructed to provide a borough-wide Employment Land Audit to support developing spatial planning strategy for employment in the borough.

The purpose of the Employment Land Audit is to understand the exact employment floorspace and operational yard space capacity across the London Borough of Waltham Forest's Strategic Industrial Land ("SIL"), Borough Employment Area ("BEA") and non-designated employment land, in order to inform what scope there is for intensification and where a masterplan led approach to release may be considered. Primarily, this the report will seek to:

- Assess the current baseline of employment land (SIL, BEA and non-designated), with a specific focus on industrial floorspace (B1 c, B2 and B8 including waste sites) and estimating existing plot efficiencies;
- Understand industrial/servicing/logistics clusters (including waste and transport as these are specific considerations in the GLA Practice Note); and
- Assess the potential for intensification and likely uplift in floorspace this could result in to assist with the need to deliver 52,000sqm of new employment space set out in the Employment Land Study.

Building on conclusions of the Employment Land Study (2019), we have taken the Site recommendations of this work to determine the employment sites that should be included in this Study. This Study aligns with the Lea Bridge Masterplan (on-going in parallel to this Study), which includes Argall Avenue (SIL 4), Rigg Approach (SIL 5), Lammas Road (SIL 6), Orient Way (SIL 7) and Low Hall Depot (BEA 8).

Wider Context

The Employment Land Study (2019) concluded that in employment terms, the GLA forecasts that the borough will need to accommodate over 8,100 jobs over the Plan Period to 2035 across all sectors, around a third of which would require new B class employment space – predominantly within office and light industrial typologies.

This scale and nature of projected growth within the borough, if delivered at a high density utilisation of floorspace, would result in the need for an additional 52,000sqm of B class floorspace, split as follows:

- 18,848sqm of office space;
- 36,604sqm of distribution space
- -4,215sqm of industrial space

Whilst the quantum of space seems reasonable, the types of space delivered may be different with a number of new and more 'mixed' typologies required including:

- Distribution space that can accommodate a range of small to medium sized urban servicing activities. As the market matures this could include some forms of multi-storey development.
- Industrious space that can accommodate businesses looking for a mix of light industrial, studio office, storage or even 'shopfront' space. This could take the form of the New London Mix typology where space is vertically co-located with residential.
- High Density space that provides a range of space types, from small studio spaces, flexible co-working spaces through to larger office 'suites' in multi-occupier buildings.

Each of these space types will have different locational requirements and therefore different parts of the borough will be attractive to developers and occupiers. This will require a different development approach in each broad location and within individual sites that responds to both the current context and how wider development trends will impact the place in the future.

Given that the Study concluded there were limited opportunities to create additional capacity within the designated employment sites without a strong focus

on intensification of the existing floorspace provided, across the borough it was recommended that, Intensification of floorspace provision, Intensification and follow on co-location, and Enhanced space provision through co-location should be considered.

Taking the conclusions from the Employment Land Study one step further, this Study seeks to reassess which employment sites would be suitable to deliver industrial intensification, the likely uplift in terms of new industrial floorspace, and the typologies that would be suitable to deliver on these sites to meet occupier requirements.

Sites

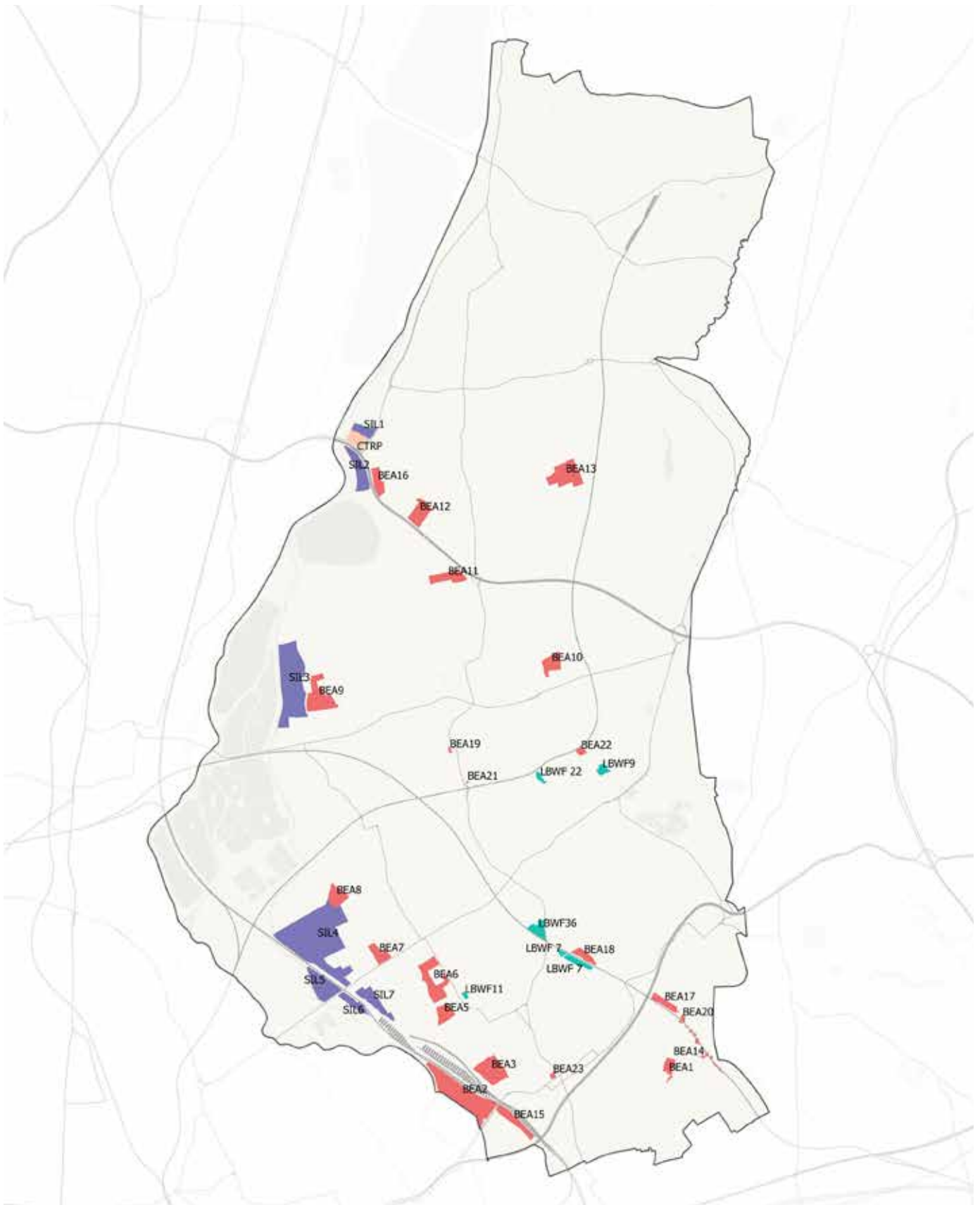
The following list of employment sites derive from the recommendation of the Employment Land Study. This is with the exception of Cork Tree Retail Park which has been agreed with the Council to be included in the assessment due to its proximity to other employment sites.

1.1 PURPOSE OF REPORT

Site List

Policy Designation	Site Location	Area	Report Total Area	Report Built Floorspace	VOATotal
SIL					
SIL1	Hall Lane	1.85	9,779	8,483	
SIL2	North Circular Road	4.06	37,113	20,335	3
SIL3	Blackhorse Lane	16.13	99,434	80,979	9
SIL4	Argall Avenue	26.91	157,835	127,541	15
SIL5	Rigg Approach	5.06	33,297	29,581	3
SIL6	Lammas Road	1.96	14,080	12,570	1
SIL7	Orient Way	3.37	17,681	16,037	1
BEA					
BEA1	Howard Road	1.40	8,028	6,143	
BEA2	Sherrin Road	11.91	25,488	20,497	2
BEA3	Auckland Road	5.16	33,164	33,164	
BEA5	Etloe Road/Simonds Road	2.15	4,986	3,252	
BEA6	Church Road	5.36	30,943	23,529	2
BEA7	Heybridge Way	2.12	8,952	7,484	
BEA8+Extension(SIL4)	Argall Avenue Extension	3.20	16,317	14,803	1
BEA9	Sutherland Road	5.72	2,780	2,281	
BEA10	Clifford Road	2.58	1,093	1,043	
BEA11	Waltham Park Way	2.92	13,491	10,280	1
BEA12	Justin Road/Trinity Way	3.21	18,464	12,044	1
BEA13	Highams Park Industrial Estate	5.67	35,186	33,597	2
BEA14	Montague Road/Courtenay Road Arches	0.40	3,137	1,511	
BEA15	Temple Mills Lane	2.70	4,135	4,135	
BEA16	Cabinet Way	2.17	13,129	7,802	1
BEA17	Joseph Ray Road	1.61	16,863	8,041	1
BEA18	Hainault Road	1.45	7,368	5,970	
BEA19	Hatherley Mews	0.16	1,458	1,396	
BEA20	Lancaster Road Arches	0.63	2,916	1,724	
BEA21	East London Office Centre	0.04	717	717	
BEA22	Barrett Road	0.55	3,255	856	
BEA23	E10 Business Centre	0.30	1,603	1,603	
Non-Designated					
LBWF7	Norlington Road	1.37	12,847	11,247	1
LBWF9	Crownlea	0.82	2,350	2,027	
LBWF11	Shaftesbury Court	0.29	1,677	957	
LBWF22	Ravenswood Industrial Estate	0.47	1,258	1,222	
LBWF36	Skeltons Lane	1.81	7,538	6,014	
Other					
CTRP	Cork Tree Retail Park	2.23			

Table 1: Employment Sites



- Strategic Industrial Land (SIL)
- Borough Employment Area (BEA)
- Non-designated employment sites (LBWF)
- Cork Tree Retail Park

1.1 PURPOSE OF REPORT

Policy Designation	Site Location	Area	Report Total Area	Report Built Floorspace	VOATotal Area	VOA Built Floor Floorspace	VOA Basement
SIL							
SIL1	Hall Lane	1.85	9,779	8,483	9,262	7,447	-
SIL2	North Circular Road	4.06	37,113	20,335	37,113	20,335	-
SIL3	Blackhorse Lane	16.13	99,434	80,979	97,965	78,363	826
SIL4	Argall Avenue	26.91	157,835	127,541	155,239	124,945	-
SIL5	Rigg Approach	5.06	33,297	29,581	30,315	26,118	-
SIL6	Lammas Road	1.96	14,080	12,570	14,080	12,570	-
SIL7	Orient Way	3.37	17,681	16,037	17,681	16,037	-
BEA							
BEA1	Howard Road	1.40	8,028	6,143	6,147	4,262	-
BEA2	Sherrin Road	11.91	25,488	20,497	25,488	20,497	-
BEA3	Auckland Road	5.16	33,164	33,164	4,773	1,680	-
BEA5	Etloe Road/Simonds Road	2.15	4,986	3,252	4,986	3,252	-
BEA6	Church Road	5.36	30,943	23,529	27,992	20,370	-
BEA7	Heybridge Way	2.12	8,952	7,484	8,952	7,484	-
BEA8+Extension(SIL4)	Argall Avenue Extension	3.20	16,317	14,803	16,317	2,747	-
BEA9	Sutherland Road	5.72	2,780	2,281	2,780	2,281	-
BEA10	Clifford Road	2.58	1,093	1,043	1,093	1,043	-
BEA11	Waltham Park Way	2.92	13,491	10,280	13,491	10,280	-
BEA12	Justin Road/Trinity Way	3.21	18,464	12,044	18,464	12,044	-
BEA13	Highams Park Industrial Estate	5.67	35,186	33,597	22,145	20,150	-
BEA14	Montague Road/Courtenay Road Arches	0.40	3,137	1,511	3,137	1,511	-
BEA15	Temple Mills Lane	2.70	4,135	4,135			
BEA16	Cabinet Way	2.17	13,129	7,802	13,129	7,802	-
BEA17	Joseph Ray Road	1.61	16,863	8,041	16,360	7,331	-
BEA18	Hainault Road	1.45	7,368	5,970	7,368	5,970	-
BEA19	Hatherley Mews	0.16	1,458	1,396	1,458	1,396	-
BEA20	Lancaster Road Arches	0.63	2,916	1,724	2,916	1,724	39
BEA21	East London Office Centre	0.04	717	717			
BEA22	Barrett Road	0.55	3,255	856	3,255	856	-
BEA23	E10 Business Centre	0.30	1,603	1,603	1,603	1,603	-
Non-Designated							
LBWF7	Norlington Road	1.37	12,847	11,247	11,652	10,052	-
LBWF9	Crownlea	0.82	2,350	2,027	2,350	2,027	-
LBWF11	Shaftesbury Court	0.29	1,677	957	1,677	957	-
LBWF22	Ravenswood Industrial Estate	0.47	1,258	1,222	1,258	1,222	-
LBWF36	Skeltons Lane	1.81	7,538	6,014	5,375	3,851	30
Other							
CTRP	Cork Tree Retail Park	2.23					

VOA Ground Floor	VOA First Floor	VOA Second Floor	VOA Mezzanine	VOA Operational business space	VOA Yard	VOA Parks	OS Mapping Measurement	Costar Floorspace
6,685	762	-	340	-	-	1,475	3,664	
15,799	2,502	2,035	-	16,350	82	346		
67,820	7,902	1,815	6,406	5,690	1,286	6,221	5,435	1,767
115,655	8,232	1,057	10,473	14,027	-	5,795	2,596	
22,761	2,710	646	292	1,971	552	1,382	7,853	
11,095	1,475	-	1,143	9	-	357		
14,634	940	464	59	1,320	-	265		
3,713	549	-	1,005	159	560	161	1,882	
19,866	631	-	969	997	3,024	-		
1,112	568	-	-	9	2,877	207	33,164	
3,227	25	-	420	969	-	346		
17,827	1,492	1,051	4,790	918	243	1,670	6,334	
7,484	-	-	226	396	28	818		
2,146	2,146	-	283	9,635	-	3,652	14,803	
1,898	383	-	193	169	-	138		
569	474	-	-	22	-	28		
9,331	950	-	45	1,149	-	2,016		
8,235	3,808	-	113	1,054	1,793	3,460		
12,614	3,974	3,561	252	1,040	-	703	3,659	14,414
1,466	45	-	-	73	1,554	-		
							4,135	
7,530	271	-	730	478	3,589	530		
7,097	234	-	213	7,997	416	403	2,173	
5,307	663	-	110	628	49	611		
699	697	-	15	-	-	46		
1,013	494	178	-	733	310	150		
							717	
716	140	-	-	283	2,001	115		
319	1,284	-	-	-	-	-		
8,986	1,067	-	527	842	173	58	634	2,880
1,679	196	152	41	79	146	58		
957	-	-	198	349	-	173		
1,209	13	-	26	-	10	-		
2,155	1,451	215	-	1,026	-	498	2,163	

2. APPROACH

2.1 APPROACH

SETTING OUT THE CRITERIA ASSESSMENT

Our approach is consistent with the methodology used to determine the industrial capacity and uplift potential for the Lea Bridge Gateway Masterplan. Outlined in this section, are the key concepts for measuring industrial intensification, which have been used to determine the baseline floorspace capacity and uplift potential for the sites. This includes three key stages; determining the Baseline Capacity, undertaking a Criteria Based Assessment, and calculating the Uplift Potential. Please note that this is in line with the GLA Industrial Intensification Practice Note.

Baseline Capacity

The following paragraphs set out the key considerations for measuring and determining the baseline capacity.

Floorspace capacity

London Plan policy E4a identifies that there are a several required industrial activities that should be provided and maintained to keep London functioning. This therefore identifies the land and premises that should be included in the floorspace capacity:

- light and general industry (Use Classes B1c and B2)
- storage and logistics/distribution (Use Class B8)
- secondary materials, waste management and aggregates sites
- utilities infrastructure (such as energy and water) sites
- Sites which are used for sustainable transport functions including intermodal freight interchanges, rail and bus infrastructure
- wholesale markets
- flexible (B1c/B2/B8) hybrid space
- sites for low-cost industrial and related space for micro, small and medium-sized enterprises
- Site used as research and development of industrial and related products or processes (falling within Use Class B1b).

Measuring industrial floorspace capacity

It is necessary to make various assumptions in order to complete this capacity assessment. The following measures are outlined in more detail:

1. total floorspace
2. site area
3. plot coverage
4. plot ratio

1. Total floorspace

This measure includes;

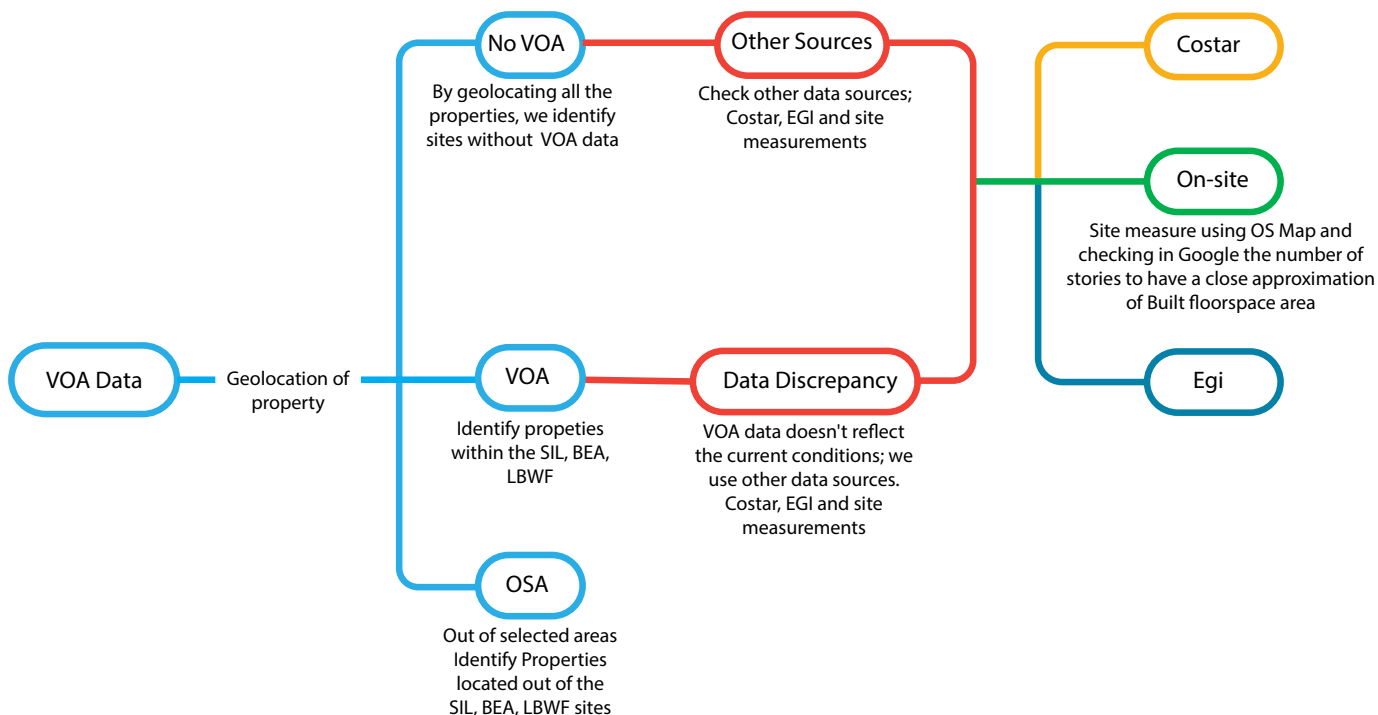
- the industrial and warehousing floorspace,
- ancillary floorspace (e.g. office space) which is being used by a given occupier in support of their core (industrial) business activities.

Non-industrial floorspace (e.g. B1A, A and D use classes) which is accommodated on a designated industrial site and is not in use in support of an industrial activity (e.g. standalone offices, retail, leisure etc, tenanted by a non-industrial business) is not included in the industrial floorspace calculation, but is to be included in the potential industrial floorspace calculation.

The total floorspace quantum has primarily been established using the Valuation Office Agency (VOA) data, which is complemented and cross-checked with digital mapping measurements. The VOA data is highly dependent on the rating surveyor (and/or business) who updates the data, and whilst it is the most comprehensible source we can draw from, it does have limitations. Please see Appendix 1 for further information on the VOA data source.

Where the VOA data for a plot is incomplete, we have complimented the floorspace information from other industry standard databases, Costar and EGi, or if this is insufficient, taken our own measurement for the property.

The diagram below sets out the step-by-step process used to determine the floorspace of each property:



In terms of the process, once we have obtained the raw VOA data, we are able to geolocate the information. This is an important first step that allows us to understand where there are gaps in the information, if a property sits outside the study area and should be discounted, or if the VOA data sits within the right employment area (SIL, BEA, LBWF).

Sites which have VOA data are then check for any discrepancies, to be ultimately sure that the data is reflecting the present-day building configurations. This is an important step due to the frequency the VOA data is updated, which can limit the accuracy of the information. Often there can be a time lag between changes in the build configuration and an updated business rates measurement and calculation. This step effectively seeks to account for this limitation.

For both sites with VOA discrepancies and/or no VOA data, we look to other data sources to collate this information. Firstly, we look at Costar (property database, updated by Costar agents and industry

surveyors), EGI (similar to Costar), and as a final resort, we measure the property using OS Maps and google (used to ascertain building height/ configuration).

There are limitations to using Costar and EGI. The floorspace is not broken down and reported in a detail manner according to a wide array of categories (i.e. yard space, mezzanine level, storage etc.) like the VOA data. Similarly, if we measure the site using OS Maps with reference to Google Maps we are unable to ascertain this level of information regarding the floorspace. Therefore, we are unable to determine the space attributed to i.e. mezzanines. At best, we can determine the number of storeys and the yard space.

In the diagram above, three colours (yellow, green and blue) are used to indicate which data sources the information comes from. This relates to the tables on pages 98 to 170 in this report. This indicates the properties measured through other means For completeness, this is the full list of sites where the measurement has been supplemented:

2.1 APPROACH

Policy Designation	Site Location	VOA Built Floor Floorspace	OS Mapping Measurement	Costar Floorspace	Plots
SIL					
SIL1	Hall Lane	7,447	3,664		HL2,HL3 (Data-On site Discrepancy / On-site Source)
SIL3	Blackhorse Lane	78,363	5,435	1,767	BL5 (Data-On site Discrepancy / Costar Source), BL7, BL17(Data-On site Discrepancy / On-site Source), BL18 (No VOA data / On-site Source)
SIL4	Argall Avenue	124,945	2,596		A2, A6, A14 (No VOA data / On-site Source)
SIL5	Rigg Approach	26,118	7,853		R5 (No VOA data / On-site Source)
BEA					
BEA1	Howard Road	4,262	1,882		HR4, HR5 (No VOA data - On-site Source)
BEA3	Auckland Road	1,680	33,164		Business relies on open storage so the VOA built floor space doesn't reflect the built floorspace that should be reprovide. On-site measurement includes the open-air storage.
BEA6	Church Road	20,370	6,334		CR15,CR6,CR7,CR8 (Data Discrepancy/On -site) & CR11,CR12 (No VOA data - On-site)
BEA8+Extension Area(SIL4)	Argall Avenue Extension	2,747	14,803		Business relies on open storage so the VOA built floor space doesn't reflect the built floorspace that should be reprovide. On-site measurement includes the open-air storage.
BEA13	Highams Park Industrial Estate	20,150	3,659	14,414	HP15,HP18 (No VOA data / On-site), HP11(Data-On site Discrepancy / Costar Source) ,HP14 (No VOA data/Costar)
BEA15	Temple Mills Lane		4,135		TML1 (VOA data outside of selected area/ On-site Source)
BEA17	Joseph Ray Road	7,331	2,173		JR2,JR4 (Data Discrepancy/On -site)
BEA21	East London Office Centre		717		EL1 (VOA data outside of selected area/ On-site Source)
Non-Designated					
LBUF7	Norlington Road	10,052	634	2,880	NS10 (Data Discrepancy/Costar), NS5 (Data Discrepancy/On -site), NS8 (No VOA data - On-site)
LBUF36	Skeltons Lane	3,851	2,163		HRL1,HRL2,HRL3,HRL13,HRL14 (No VOA data - On-site Source)

For the purposes of this study, we have sought to split the VOA Data as follows:

1) Total built floorspace

- Ground floor
- Mezzanine floor
- Additional floors (second floor)

2) Operational Space (external space which is clearly operational such as “Additional details”, “Storage Container”)

3) Yard space (any other external space which cannot be identified as either operational or non-operational)

2. Site area

Site area is assumed to not include shared access roads, as these are gross areas additional to individual plot requirements.

Site area can be measured either at the scale of:

- each SIL area;
- character areas; or
- individual site areas.

In order to make a comparable and usable measure

of the existing situation, it is proposed that character areas are used, in order to avoid an unwieldy number of site-by-site calculations. These can then be compared with one another.

3. Plot coverage

Plot coverage is defined as the total building footprint on a given site, divided by the total site area. The quantity of floorspace used in this equation is the total of the floorspace at ground floor level only.

4. Plot ratio

Plot ratio is defined as the gross floor area (GFA) on a given site, divided by the total site area. The total quantity of floorspace (GEA) used in this calculation is gross floorspace across all floors.

$$\text{Plot Ratio} = \text{Total Gross Floorspace} / \text{Total Site Area}$$

In addition to the above, we have considered the efficiency of the Industrial typology, the yard space, the non-operational space, and parking for each site.

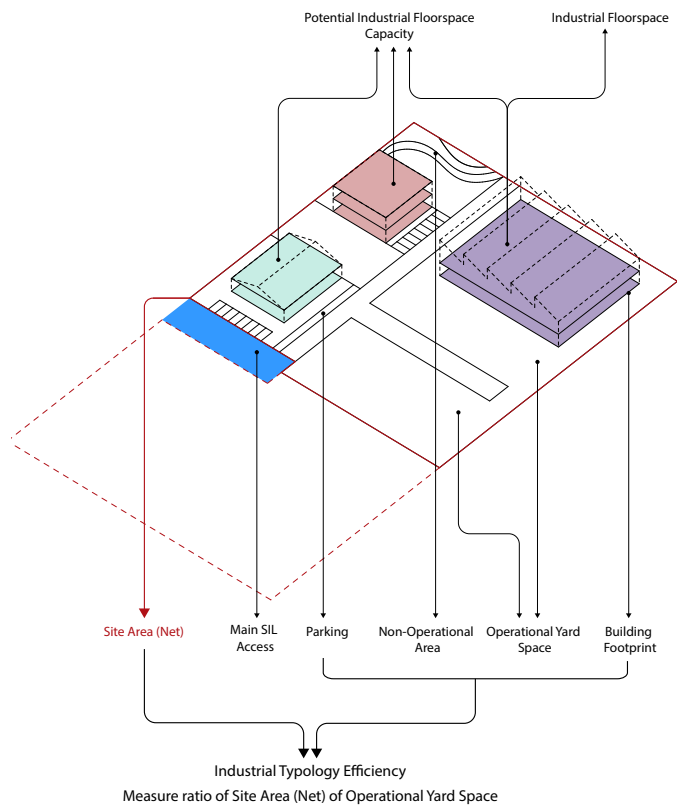


Figure 1: Measuring Plot Ratio

- Total Site Area
- Industrial Floorspace
- Ancillary Floorspace
- Non - Industrial Floorspace
- Main SIL Access

Industrial typology efficiency

Industrial typology efficiency is a measure of how efficiently the site as a whole is used by industrial uses, including yard space. This measure is in addition to the floorspace capacity measure and offers a more detailed assessment. The measure highlights how densely used the site is, and whether parts of the site are redundant. It also offers an assessment of what the needs and requirements of each industrial typology are, in order to provide a better understanding of what will need to be reprovided, and to determine what typologies will need to be reprovided.

Yard space

Yard space is defined as the external space needed by a given industrial occupier for their core business activities. This space is typically provided by a yard (covered or uncovered) and is often used for storage, production or processing activities which directly support a business' primary activity. This includes servicing and circulation space for vehicles which enable the movement of goods related to the core business activity.

Non-operational space

Defined as non-accessible open space, areas behind fencing and dimensionally inaccessible spaces and green areas, can be calculated as follows:

$$\text{Total site area} - \text{Building footprint} - \text{Yard Space} - \text{Access} - \text{Parking} = \text{Non Operational space}$$

Parking

Staff and customer parking were also measured in order to identify coverage percentage that represent within the industrial site.

2.1 APPROACH

Criteria Based Assessment

The criteria-based assessment has been used to identify where there may be potential areas to focus intensification. Five criterions have been used to guide the decision-making process:

1. Nature and extent of ownership consolidation
By setting out the nature and extent of the ownership within the sites, it can be determined where there are areas of consolidated land ownership, and therefore opportunities for intensification. Fragmented ownership can be a significant cost and barrier to development and therefore requires careful consideration.
2. Condition of existing stock
Analysing the condition and imminent obsolescence of stock helps to identify opportunities for intensification. Owners who need to invest in their stock may take the opportunity to increase floorspace and hence income. By identifying where there may be core areas where stock is particularly old and therefore likely to be reaching the end of its useful life – this will provide a strong basis for intensification.
3. Utilisation of land and sites
There is potential to analyse the development land usage to identify where possible intensification could be delivered.
4. Ability to co-locate business activities
By analysing the current uses and their operations within employment sites, it can be identified where there may be challenges to co-locate business activities with other uses.
5. Limitations to increased servicing activity
The current road network can be analysed to understand whether it is able to accommodate increased industrial capacity and will meet the need of industrial occupiers.

Through the criteria-based assessment it can be determined where there are particular areas, within the employment sites, with the right set of conditions to support the case for industrial intensification.

2.1 APPROACH

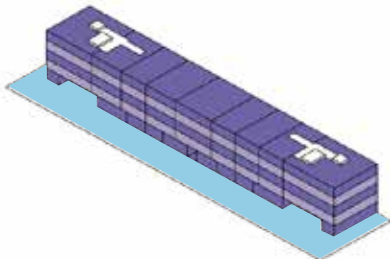
CALCULATING THE UPLIFT POTENTIAL

Once an area of intensification is identified, different industrial typologies are used to create a series of scenarios. Some scenarios include the total development of the area and the other one, a partial development. Each scenario achieves different levels of intensification, setting up a minimum a maximum uplift.

Set out below are a series of differing typologies that have been used to calculate the potential uplift in the areas identified suitable for intensification. The typologies are the result of a series of considerations including, research and analysis of precedents, the existing and future spatial demand, business aspirations, industrial space requirement baseline, and design principles. Each typology has a different scale, hosts various type of businesses, and reaches diverse intensification levels. The selection of the typologies is correlated with the site analysis.

Typology A: Stacked Light Industry

Light industrial units which do not require operational yards and are therefore stackable, served by cargo lifts.



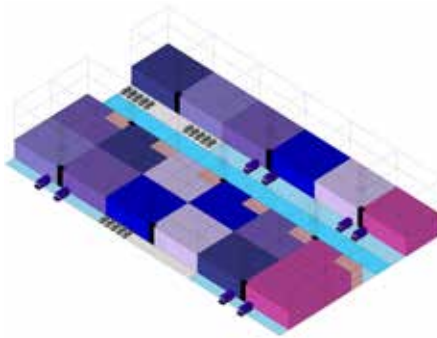
Average Plot Size: 0.7 - 1 ha

Plot Ratio: 234%

Potential for stacking: 5 floors

Typology B: Shared Yard

A group of ground dependent and small stackable units with clustered shared yards and goods lifts, designed to maximise efficiency.



Average Plot Size: 0.8 - 3.5 ha

Plot Ratio: 150%

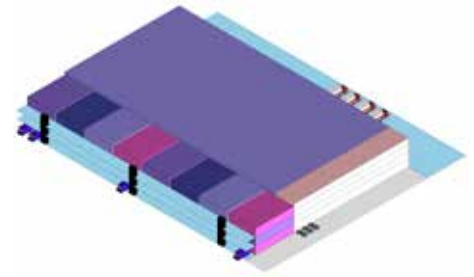
Plot Ratio without parking: 156%

Potential for stacking: 3 floors

Parking: 5-25% (Depends on unit type)

Typology C: Attached Structure

A group of small stackable units attached to a ground dependent larger industrial building, creating an active frontage to the large unit.



Average Plot Size: 4 ha

Plot Ratio: 110%

Plot Ratio without parking: 116%

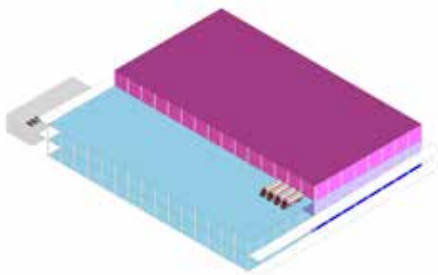
Potential for stacking: 3-4 floors (smaller units)

Parking: 8-25% (Depends on unit type)



Typology D: Multi-storey Industrial 3 Storey

A group of large and medium stackable and ground dependent units, maximising land use. Potential to stack smaller light industry on top of large units, served by cargo lifts. Consolidated, multi-level parking on site.



Average Plot Size: 2.7 - 5.5 ha

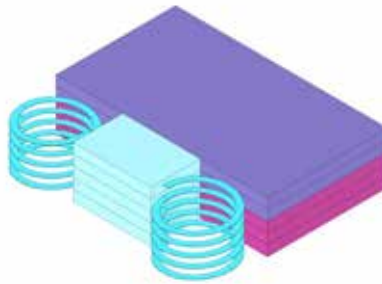
Plot Ratio: 165%

Potential for stacking: 3 floors

Consolidated Parking: 8-35%
(Depends on unit type)

Typology E: Multi Storey Industrial 5 Storey

A group of large units serving both ground dependent or stackable units. Each floor has an operational yard with direct HGV access via ramps.



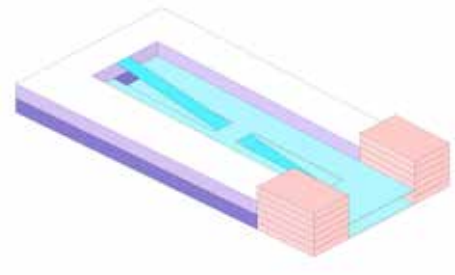
Average Plot Size: 4.5 - 6 ha

Plot Ratio: 200%

Potential for stacking: 5 floors (Large units)

Typology F: Co-location with employment

A group of small to medium units, accommodating both ground dependent or stackable uses, co-located with office blocks to create an active frontage. All units have small operational yards.



Average Plot Size: 1.3 ha

Plot Ratio: 126%

6 floors of offices (2 floors of small/medium industrial units)

On plot car parking

2.1 APPROACH

BUILT EXAMPLES

Gewerbehof Laim

Bogevischs buero architekten
Munich, Germany



Plot Ratio: 234%
Plot Coverage: 14%
Site Area: 0.96 Ha
5 floors

- Usage: Five stories of light industry, providing high density for uses such as joinery, leather, workshops, garment manufacturing and fine metalwork.
- Service Yard: A shared service yard with two loading and marshalling areas. 4 goods lift give access to upper level internal access corridors (1500sqm) designed to take fork lift trucks.
- Access: Two main access to the loading area and internal access. Ramped access to basement parking.

Berlartza

Inaki Begiristain Arkitektura Bulegoa
Donostia-San Sebastian, Spain



Plot Ratio: 101%
Plot Coverage: 78%
Site Area: 0.84 Ha
3 floors

- Usage: Industrial uses over two levels. A ramp for vehicles and an open air parking on top. Commercial uses for the external spaces.
- Service Yard: Average size of load yard per unit 7x9m (including the internal road). Collective yard on the ground and first floor.
- Access: Two main access points; one on the ground floor for the central operational yard and another access by ramp to the first floor to the central operational yard.

The Gantry Studios

Hawkins Brown & Architecture oo
HereEast, London, UK



Plot Ratio: 133%
Plot Coverage: 60%
Site Area: 4.34 Ha
3 floors

- Usage: 21 artist studios and temporary housing over 3 floors.
- Service Yard: N/A
- Access: Main access is through one core containing a cargo lift and stairs. The wide pavement serves as a temporary loading bay while in use, and part of the street otherwise.

Prologis Georgetown Crossroads

Nelson Architects
Seattle, USA



Prologis Narashinio 4

Tokyo, Japan



Binck Twins Business Centre

KOW Architecten
The Hague, Netherlands



Plot Ratio: 100%

Plot Coverage: 41%

Site Area: 5.49 Ha
3 floors

- Usage: Level 1 & 2 have HGV ramp access. Level 3 is designated for light industrial use. It is served by 3 cargo lifts. Space is flexible, and ancillary office space can be added as required.
- Service Yard: Level 1 has ground level servicing yard, Level 2 has its service yard on top of part of the level 1 warehouse, served by HGV ramps. Level 3 has loading docks at ground level connected by cargo lifts.
- Access: Street Access. Most of the ground space is absorbed by access space for the HGV ramp.

Plot Ratio: 199%

Plot Coverage: 52%

Site Area: 4.62 Ha
5 floors (Large units)

- Usage: 5 storey stacked storage warehouse. 5.5m clearance height per level, with 13.5m truck court depth.
- Service Yard: Internalised service yards.
- Access: Street access leads to 2 spiral ramps for one way HGV access to all levels.

Plot Ratio: 126%

Plot Coverage: 90%

Site Area: 1.32 Ha
6 floors (small/medium units)

- Usage: Two stories of light industrial units and six stories of offices.
- Service Yard: Two levels of operational yard with central ramp access and parking on the roof.
- Access: One main ramp access which connects three levels, the operational yards and the parking.

3. SITE BY SITE ANALYSIS

3.1 SITE BY SITE ANALYSIS

As outlined in the introduction, the outcome of the Stage 1 analysis for the Lea Bridge Masterplan has identified that there is potential to consider intensification in three areas within the Argall Avenue (SIL 4) and Rigg Approach (SIL 5).

The process of identifying these areas of opportunity for intensification was determined through a similar criteria analysis. A summary is provided below.

Area of Intensification 1 (Argall Avenue - South)

The southern sub-area of Argall Avenue presents the most supportive conditions for industrial intensification.

- The ownership pattern is fairly consolidated; there are only a handful of freeholders and leaseholds layered above this.
- The existing stock is relatively dated and in poor condition; therefore in need of modernisation.
- There are large swathes of underutilised open yard and the current configuration of properties is poor.
- There is poor access into the sub-area via Lea Bridge Road. Access along Burwell Road creates conflicts with the existing residential properties lining the road to the east.
- There is only one fixed use, which is the waste site. Therefore, the majority of the sub-area could be co-located with other uses. Opportunity to consider delivering industrial development which is sensitive to the existing residential properties along Burwell Road.

Area of Intensification 2 (Argall Avenue - North)

The collection of warehouses to the west of the Argall Avenue sub-area presents moderate conditions for industrial intensification.

- The freeholder is the Council, but there are long leaseholds layered above that could be costly to consolidate.
- Majority of the existing stock is relatively dated and in poor condition; therefore, in need of modernisation.
- The current configuration of warehouses is poor, and there is an opportunity to incorporate the underutilised surface car park next to the church (located at 17 Argall Avenue) into a new development.

- The current road network does not meet the needs of the current vehicular traffic and presents a challenge for HGVs.
- Bates of London, the laundry service, could be a potential fix, but it is considered that their operations may be able to co-locate with other uses.

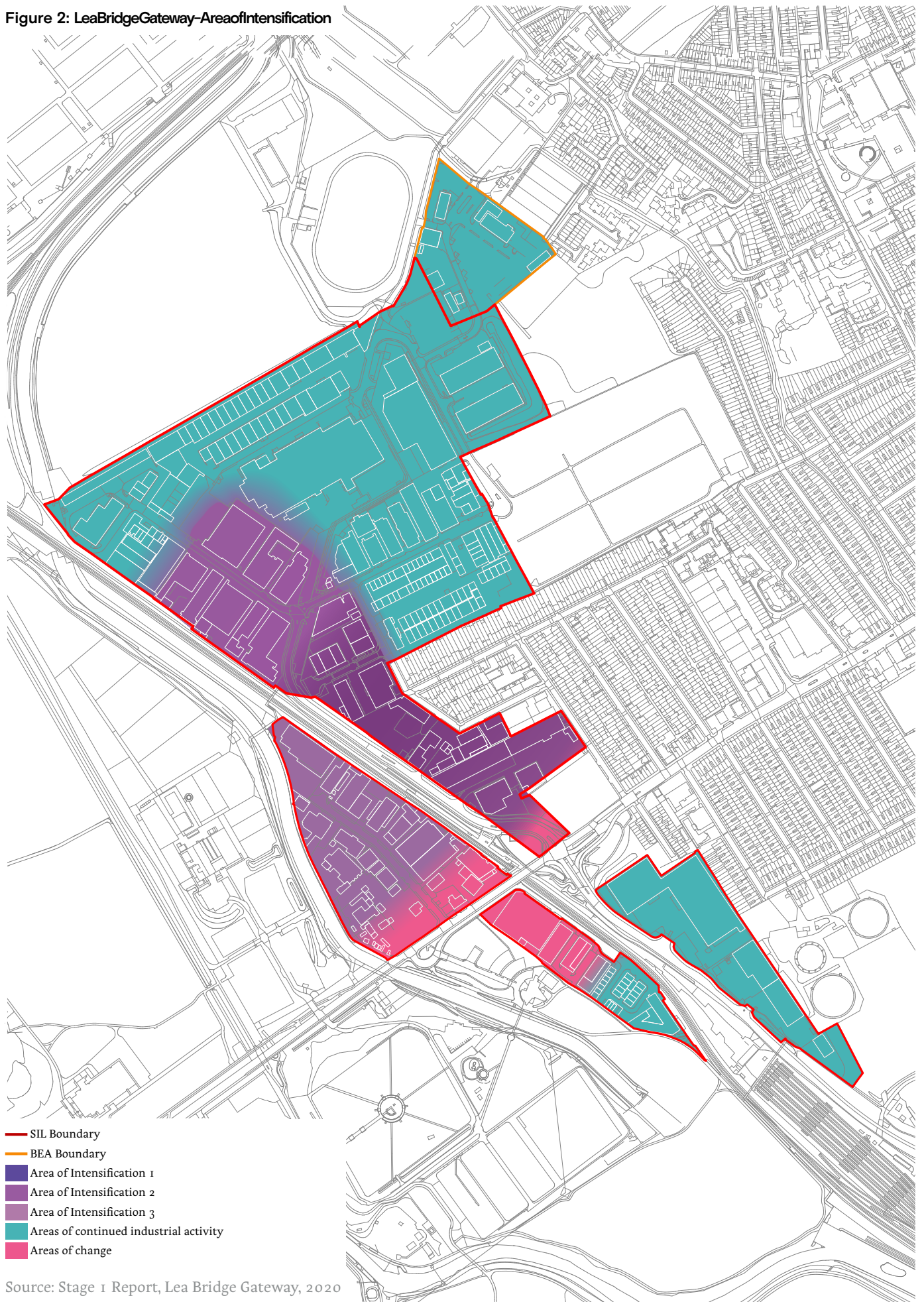
Area of Intensification 3 (Rigg Approach)

Rigg Approach, with the exception of the sites fronting the Lea Bridge Road, has some positive conditions for industrial intensification.

- As an advantage, the Council are the freehold owners of the large plot of land to the rear of Rigg Approach. However, the majority of freeholds are held by private owners, who are owner-occupiers. Consolidating ownership could be a lengthy and costly challenge if the landowners are not in agreement.
- Majority of the existing stock is dated, in poor condition and in need of modernisation.
- Most of the plots are well utilised, and most businesses do not need much yard space.
- Internally the layout is sufficiently organised for the current operations. This is with the exception of Northfields Linen (10 Rigg Approach).
- Turning into estate is constrained, and there is a very tight and challenging turning circle for HGVs.
- There are a number of fixes, including Tipmasters and Structural Steelworks Engineering. Due to the existing high investment into their sites and/or the operations, it is unlikely these businesses could move without incurring high cost and colocation with other uses.

In line with this approach, the remainder of this section sets out the outcome of the criteria-based analysis for the employment sites and identifies, if any, where there may be opportunities for intensification within the employment area.

Figure 2: LeaBridgeGateway-AreaofIntensification



Source: Stage 1 Report, Lea Bridge Gateway, 2020

3.2 SIL SITES - 6 CRITERIA

SIL 1 HALL LANE

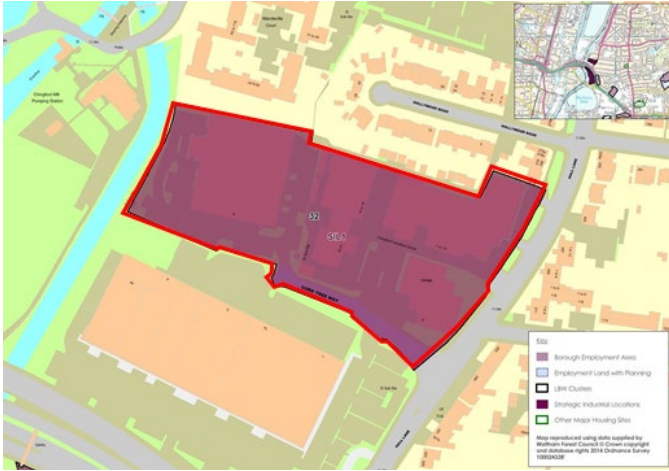


Figure 3: SIL 1, Hall Lane

Source: LBWF Employment Land Study, 2018

Location and context

Hall Lane is shown in Figure 3. The site extends c.1.9 ha and is situated to the north-west of Edmonton, Chingford. SIL 1 is situated immediately north of the North Circular Road and west of the A1009, with Meridian Water train station 0.9 miles south west from the site. Generally, Hall Lane's close access to the North Circular makes it attractive to industrial tenants.



Figure 4: Largest Land Owners

Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
1	Cork Tree Estates LLP	1.8	0.72
2	Hodgson Automotive Limited	0.96	0.38

Table 2: Largest Land Owners, SIL 1

Source: Nimbus, 2020

Nature and Extent of Landownership

The land within SIL 1 is divided into ten land parcels and is within seven freehold ownerships. The two largest freeholders account for 58% of the site.

There are no owner-occupiers within the SIL area. Hodgson Automotive are a register franchisee car dealership of Audi, however Audi are not registered owners of the land. According to Nimbus there are 9 long leaseholders (meaning leases which are seven years or longer). Within the SIL, there are a wide range of business activities, but predominantly (by number of leases) businesses are associated within the 'Automobile' industry (MOT, vehicle repair and spare parts).



Figure 5: Building Age Map, S

Source: Nimbus, 2020

Condition of existing stock

The properties mainly comprise of single storey brick buildings. They have lower ceiling heights and limited land for access. They are purpose built for unique smaller industrial uses thus will be difficult to accommodate a variety of tenants and uses. Hall Lane's stock is in relatively good condition with the



■ Pre 1900s ■ 1901-1950 ■ 1951-1980 ■ 1981-2010 ■ 2010+

Figure 6: Age of Stock, SIL 1

Source: Avison Young, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	10,537	2
1981 - 2010	5,400	1
2010 +	0	0

Table 3: Size and age of stock, SIL 1

Source: Costar, 2020

stock being built between the 1970s and 1990s.

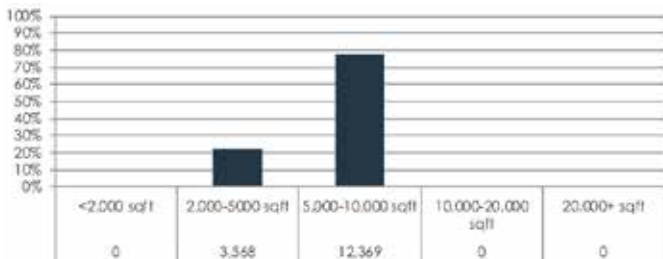


Figure 7: Size of Stock, SIL 1

Source: Costar 2020

Size of properties

Most of the property floorspace falls within the 5,000-10,000 sqft range, specifically between 3,500 to 7,000 sqft, reflecting the smaller size of the units. This is likely due to the subdivision of the properties into smaller units.

Total sqft	0	3,568	12,369	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	1	2	0	0

Table 4: Size of stock, SIL 1

Source: Costar, 2020

Utilisation of land and site

The areas highlighted in yellow represent parcels of land which are considered to be underutilised and could be incorporated into a new scheme to make more efficient use of the land. This includes large swathes of open forecourt, surface car parking or brownfield land.

Across the SIL area the land is fairly intensively used. Much of the land is taken up by the road network. The open forecourt used by the Audi sales garage does not appear to be fully utilised, so there could be potential to better rationalise the plot to allow for industrial development to be delivered.



Figure 8: Underutilised land, SIL 1

Source: Avison Young Analysis, 2020

Uses

There are a number of occupiers within the SIL area including Audi (showroom), and Matthews (commercial printer) in standalone properties.

Within Chingford Industrial Centre the occupiers include a MOT garage, Mercedes Parts Centre (auto parts retailer), Eddie Andrews (Furniture wholesaler), County Mastics (fire protection consultant), Stanley Engineering and County Construction Chemicals (building material supplier), Custom Ice (car audio equipment specialists) and Flamelog (home retailer).

The property that sits between Chingford Industrial Centre and Matthew Commercial Printer does appear to be occupied, but there is no record of this tenant.

The mix of activities and their operations implies that there are opportunities to consider co-location. Matthews Printers may be suitable to co-locate with lighter industrial and/or employment uses above, with a similar opportunity at Chingford Industrial Centre.

3.2 SIL SITES - 6 CRITERIA

Servicing

The Site has access to the North Circular via Hall Lane (A1009). The site is surrounded by an effective strategic road network but presents slight access challenges via the secondary access road. Moreover, several of the servicing roads appear unable to support HGV movement. Hall lane can become quite congested due to the residential uses to the north and east of the site



Figure 9: Servicing, SIL 1

Source: Avison Young, 2020

Areas of opportunity for Intensification

Figure 10 shows potential opportunities for intensification within the Site. In the figure, the solid white line indicates the boundary of the Site, with the dotted line indicating the adjoining Cork Tree Retail Estate, addressed later within this report. Given the good opportunity for co-location, absence of a development pipeline and effective servicing, the highlighted areas are deemed as suitable for intensification and could provide opportunity moving forward.



Figure 10: Areas of Opportunity for Intensification, SIL 1

Source: Avison Young Analysis, 2020

SIL 2 – NORTH CIRCULAR



Figure 11: North Circular, SIL 2

Source: LBWF Employment Land Study, 2015

Location and context

North Circular is shown in Figure 11. The site extends c.3.9 ha and is situated immediately north-west of the Banbury Reservoir, around 0.75 miles east of Meridian Water train station. The site is accessible via the North Circular (A406) which immediately adjoins the site to its east and Shadbolt Avenue, which enters the site. Its close access to the North Circular makes it attractive to industrial tenants.

Nature and Extent of Landownership



Figure 12: Largest Landowners, SIL 2

Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
1	Costco	6.85	2.77
2	General Motors	1.96	0.79

Table 5: Largest landowners, SIL 2

Source: Nimbus, 2020

There are four land parcels within the North Circular spread across three freeholders. Over 90% of the site is held within two ownerships, as shown in Table 5. The largest freeholder is Costco (wholesaler).

The ownership structure within the SIL is relatively consolidated. Both freeholders (Costco and General Motors) occupy their sites. Despite the four land parcels displayed visually, according to Nimbus there are 6 long leaseholders. Business activity is equally distributed over 'Car Dealership & Rental'; 'Storage' and 'Consumer Wholesale'.

Condition of existing stock

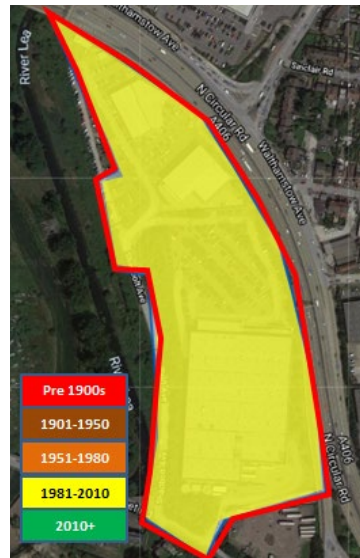


Figure 13: Building Age Map, SIL 2

Source: Nimbus, 2020

The properties mainly comprise large brick and metal warehouses spanning 2 to 4 floors. The properties have the flexibility to accommodate various tenants and uses, due to their high eaves and large loading spaces. The stock within the site is fairly modern; both properties were completed in 1997 and 2000 respectively.

3.2 SIL SITES – 6 CRITERIA

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	195,777	2
2010 +	0	0

Table 6: Size and Age of Stock, SIL 2

Source: Costar, 2020

Size of properties

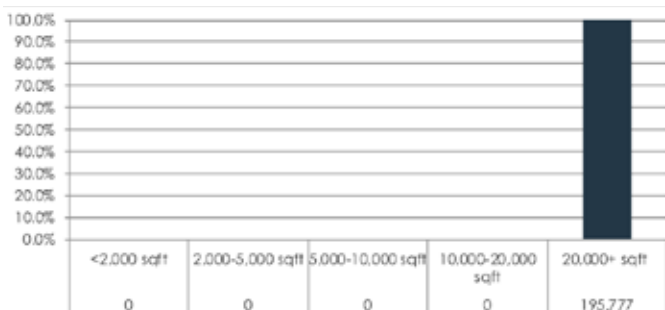


Figure 14: Size of Stock, SIL 2

Source: Costar, 2020

Both properties are above 20,000 sqft in size and are large distribution and storage warehouses. 1 Shadbolt Avenue (Costco) is c.130,000 sqft whilst Shadbolt Avenue (Safestore) is c.67,000 sqft.

Total sqft	0	0	0	0	195,777
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	0	0	2

Table 7: Size of Stock, SIL 2

Source: Costar, 2020

Utilisation of land and site

The northern portion of SIL 2 comprises large surface car parking that could be rationalised and consolidated into a multi-storey car park. Similarly, the land used by Bristol Street Motors for parking their vehicles could be better rationalised, potentially into a multi-storey building. This could free up and create large plots for new industrial development.



Figure 15: Underutilised Land, SIL 2

Source: Avison Young Analysis, 2020

Uses

There are three occupiers within the SIL area; including a car sales garage and showroom, Costco (including a Hertz), and a Safestore Self Storage.

It is possible to consider co-location with industrial or other employment uses with these activities. This could include a multi-storey concept, which allowed lighter activities within small units above. If co-location with residential is considered, the HGV movement associated with Costco operations will need to be carefully thought through to determine whether the noise can be actively managed and will align with residential development requirements. However, given the relative age of the properties (which are fairly modern) this is likely to be a long-term consideration.

Servicing

SIL 2 presents a strong strategic road network with fast access onto the North Circular via Harbet Road. Harbet Road is shared with the industrial uses to the west and the road can become moderately congested during rush hour (especially near the roundabout). Servicing roads into the Site are accessed via Shadbolt avenue. The road network is disjointed within the SIL area, with no connectivity between the north and south of the site. Given the strong strategic road network, the Site is deemed suitable for distribution and logistics activity.



Figure 16: Servicing, SIL 2

Source: Avison Young, 2020

Areas of opportunity for Intensification

Figure 17 shows potential opportunities for intensification within the Site. Given the consolidated nature of ownership, with just three freeholders, good opportunity for co-location, and excellent strategic road network, the highlighted areas are deemed as suitable for intensification.



Figure 17: Areas of Opportunity for Intensification, SIL 2

Source: Avison Young Analysis, 2020

3.2 SIL SITES – 6 CRITERIA

SIL 3 – BLACKHORSE ROAD



Figure 18: Blackhorse Road, SIL 3

Source: LBWF Employment Land Study, 2015

Location and context

Blackhorse Lane SIL is shown in Figure 18. The site extends c.15.88 ha and is situated east of Walthamstow Wetlands, approximately 250 meters south of Blackhorse Road train station. The site is accessible via the A503 and Blackhorse Lane (B179). Generally, its close access to road networks, as well as a body of water makes it attractive for a variety of uses

Nature and Extent of Landownership



Figure 19: Largest Landowners Map, SIL 3

Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
1	Delta Display Properties Limited	4.4	1.78
2	BNP Paribas Depository Services (Jersey) Limited	8.9	3.6
3	Legal & General Property Partners (Industrial Fund) Limited	5.2	2.1

Table 8: Largest Landowner, SIL 3

Source: Nimbus, 2020

The SIL area is subdivided into 20 land parcels, and is within 14 freehold ownerships. However, over 50% of the land is held within three ownerships, as shown in Nature and Extent of Landownership

Table 8. This includes BNP Paribas, Legal & General and Delta Display Properties.

According to Nimbus, the Site contains c.47 long leaseholders. The largest business activity (by number of leases) is the manufacturing and production of Food and Beverage which includes breweries, bars, cafes and roasteries. The second largest business activity (by number of leases) is 'Building Materials'.

Condition of existing stock



Figure 20: Building Age Map, SIL 3

Source: Nimbus, 2020

The properties mainly comprise medium size warehouses of fair condition. There are clusters of more modern properties with large eaves (for distribution uses) situated within the north and southern part of the SIL area.

The majority of the properties were completed between 1951 and 1980. Properties within the north and south of the SIL area appear to be more modern

than the properties in central areas, dating from 1981-2010, as shown in Figure 21.

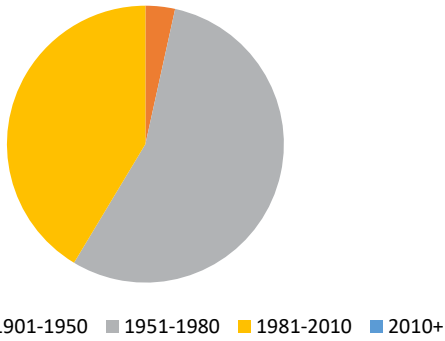


Figure 21: Age of Stock, SIL 3

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	625	1
1951 - 1980	443,675	16
1981 - 2010	411,160	12
2010 +	0	0

Table 9: Size and Age of Stock, SIL 3

Source: Costar, 2020

Size of properties

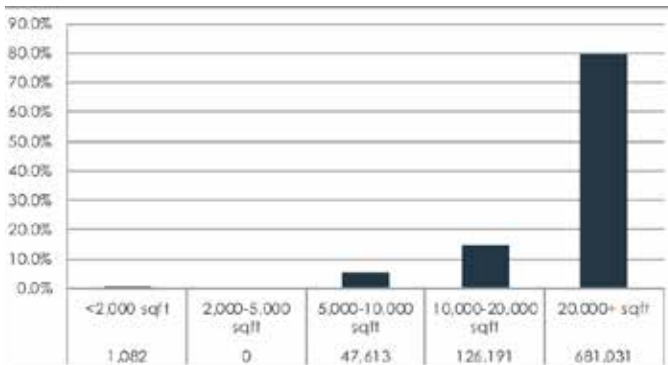


Figure 22: Size of Stock, SIL 3

Source: Costar, 2020

Figure 22 shows that the majority of the properties are larger than 20,000 sqft. The properties are predominantly larger warehouses subdivided into smaller units. There is a notably sized 149,334 sqft warehouse addressed as Blackhorse Lane, however with over half of its space (c.91,000 sqft) vacant, the indication is that there is less demand for larger units

Total sqft	1,082	0	47,613	126,191	681,031
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	3	0	5	8	15

Table 10: Size of Stock, SIL 3

Source: Costar, 2020

Underutilised Land



Figure 23: Size of Stock, SIL 3

Source: Avison Young Analysis, 2020

Overall, the land is intensively used and it may be difficult to consider intensification from an underutilisation of land perspective. To the south, there are a number of open surface car parks that could be consolidated and rationalised to improve the road network. To the north off Priestley way there is large open surface for car parking and storage that could be better rationalised.

Uses

There are a wide range of uses within the SIL area with a high proportion of creative businesses, specifically within the Upland estate.

The Delta Group occupy 153-157 Blackhorse Lane, a c.94,564 sqft warehouse to the north of the SIL area. Given the current activity there could be potential to consider co-location with this use. However, this is likely to be a long term consideration.

Upland business park is situated in the middle of the SIL area and is currently vacant. This provides a

3.2 SIL SITES - 6 CRITERIA

potential opportunity to deliver an intensified, mixed use scheme.

C&S house in Uplands Business Park is occupied by a builders' merchant and similarly Unit 2 Uplands Business Park is occupied by Exotic Veneers (retailer/wholesaler). Given that the current activity within the properties is retail/wholesale-orientated there is scope to consider co-location with industrial and other employment uses. It should be noted that Waltham Forest College occupies Upland house situated adjacent to these properties

Units 13-14, 15-15a, and 18-20 Uplands Business Park is occupied by a cleaning product manufacturer, a brewery and a coffee roasters. There is potential to consider co-location with industrial and/or other employment uses, stacked above. This would be beneficial given the previous loss of industrial capacity. Given the manufacturing nature of these businesses and by-products, it may not be suitable to consider co-location with residential uses.

Servicing

SIL 3 has moderate strategic road connectivity, with Blackhorse Lane presenting onward links to the M11. The current activity implies that road network doesn't need to accommodate HGVs (very few distribution uses). Notwithstanding this, Blackhorse Lane can become quite congested at times. As the southern portion of the Site has been released for mixed-use (including residential), there could be potential for greater congestion from non-industrial uses at the intersection between Forrest Road and Blackhorse Lane. Generally, internal servicing roads are good, with internal courtyards, however, the servicing in the northern section of the Site is fairly convoluted. It's worth noting that the red dotted line represents Eden's Girls school, which has gated access, shut off from the rest of the Site.



Figure 24: Servicing, SIL 3

Source: Avison Young, 2020

Areas of opportunity for intensification

Some of the areas within the Site with more consolidated ownership structures, and more dated stock present good opportunity to consider intensification. In particular, the area highlighted within the centre of the Site could seek to rationalise some of the adjacent underutilised land.

In terms of uses, co-location with other employment/light industrial uses is deemed most suitable. This would align with existing uses and be responsive to some of the aforementioned constraints of the immediate strategic road network and access arrangements.



Figure 25: Areas of Opportunity for Intensification, SIL 3

Source: Avison Young Analysis, 2020

3.3 BEA SITES

BEA1 – HOWARD ROAD



Figure 26: BEA1 – Howard Road

Source: LBWF Employment Land Study, 2019

Location and context

Howard Road is shown in Figure 26. The site extends c.1.4 ha and is situated immediately south of Leytonstone. The Site is accessible via High Road Leytonstone, which it adjoins, providing reasonable links to the A12. Public transport connectivity is good, with Leytonstone High Road station (approximately half a mile away) presenting strong links to central London via the Overground. Leytonstone Underground Station is also fairly accessible, at a c.0.9mile distance. Given its positioning on a major High Street, good public transport accessibility and the convoluted access to the major road network, the Site is generally attractive to retail/light manufacturing tenants as opposed to heavier industrial or distribution uses.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Nutbury Company	1.7	0.7
2	The Mayor and Burgess of The London Borough of Waltham Forest	0.7	0.3
3	J&J Properties LLP	0.4	0.2
4	Refrigeration Spares Limited	0.3	0.1

Table 11: Largest landowners – BEA 1

Source: Nimbus, 2020

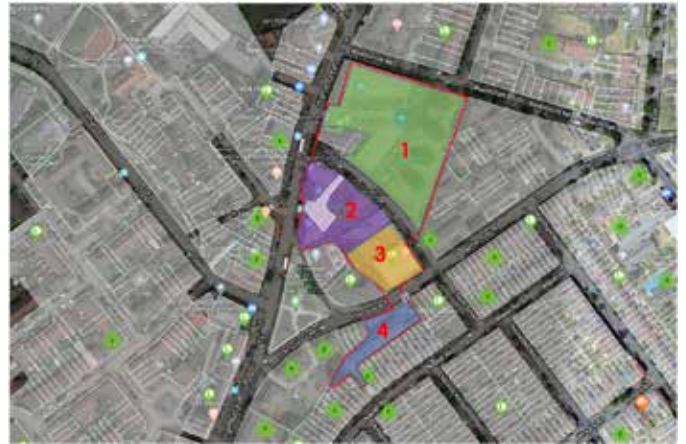


Figure 27: Largest landowners map – BEA 1

Source: Nimbus, 2020

The freehold ownership on the Site is fairly consolidated with four main land parcels spread across four separate freeholders. The largest freeholder is Nutbury Company, who own c. 50% of the Site area. It's worth noting the presence of public ownership, accounting for c. 20% of the Site.

The lease structure on the Site is fairly straightforward, with Nimbus listing just 4 leases. These present industry types encompassing retail (Home Tiles Limited, East London Printers) and healthcare (Triangle House Health Centre, Harrow Road GP Practice).

Condition of existing stock

CoStar data is only available on three units within the Site. Of these units, the properties mainly comprise 2-storey brick buildings. The stock is fairly dated with two units completed in the 1970s and one unit completed in the 1980s. This is reflected below in Figure 28 and Table 12.

Of the units without data available, the appearance suggests that they were built at a similar time to the highlighted units in Figure 28.



Figure 28: Building Age Map – BEA 1

Source: Nimbus, 2020



■ Pre 1900s ■ 1901-1950 ■ 1951-1980 ■ 1981-2010 ■ 2010+

Figure 29: Age of Stock – BEA 1

Source: Avison Young, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	33,568	1
1981 - 2010	14,520	2
2010 +	0	0

Table 12: Size and age of stock – BEA 1

Source: Costar, 2020

Size of properties

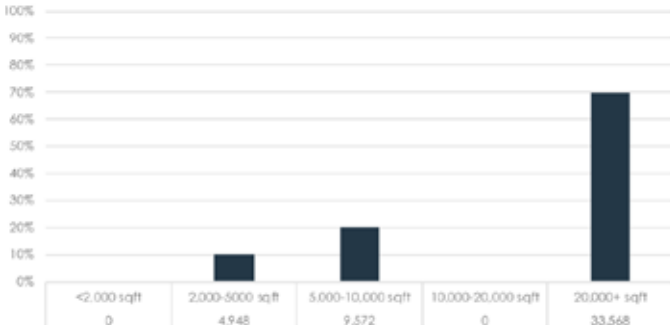


Figure 30: Size of stock (sqft) – BEA 1

Source: Costar, 2020

Of the three properties that Costar presents data on, there are a range of property sizes represented on Site, incorporating 2,000-5,000sqft, 5,000-10,000sqft and 20,000sqft+. It's important to note that the 9,572 sqft unit at Acacia Business Park is subdivided into 10 individual warehouse units.

Total sqft	0	4,948	9,572	0	33,568
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	1	1	0	1

Table 13: Size of stock – BEA 1

Source: Costar, 2020

Utilisation of land and site

The northern portion of the BEA comprises large surface car parking for the Home Tiles and B&M Bargains units, as well as some underutilised yard space. Given the scale of the car parking facility, there is a question around whether this area could be rationalised and consolidated.

Similarly, the open yard space highlighted in the south of the BEA appears underutilised and there could be opportunity here to re-configure the existing units in a more conventional linear arrangement with increased plot ratios to make more efficient use of yard space.



Figure 31: Underutilised land – BEA 1

Source: Avison Young analysis, 2020

Uses

There are several occupiers within the Employment area, encompassing retail, office and light industrial uses. Occupiers include: B&M Bargains, Home Tiles, Driver Hire Ltd (office space), Lorraine's Curtains, Kelly's Blinds, Stayer Cycles, Leyton Taxi parts, Your Chocolate.

Given the light intensity of these uses, it is possible to consider co-location with industrial, other employment or residential uses with these activities. This could include a multi-storey concept, which allows lighter activities within small units above.

Servicing

There is access to A12 via High Road Leytonstone. The strategic road network is quite poor and in addition to this, the servicing roads appear to be unable to support HGV movement. It appears that Harrow Road can become quite congested as it is shared with residential uses.

3.3 BEA SITES



Figure 32: Servicing - BEA 1

Source: Avison Young analysis, 2020

Areas of opportunity for intensification

Acacia Business Centre is within Waltham Forest freehold ownership which presents an opportunity to consider re-providing the employment space loss to retail uses through a multi-storey development.

Given that the strategic road network is fairly poor and the access roads are shared with residential uses, the employment location lends itself to be suitable for small, light industrial or other employment (office) uses.



Figure 33: Areas of Opportunity for Intensification - BEA 1

Source: Avison Young analysis, 2020

BEA2 – SHERRIN ROAD



Figure 34: BEA 2 - Sherrin Road

Source: LBWF Employment Land Study, 2019

Location and context

Sherrin Road is shown in Figure 34. Sherrin Road accommodates the New Spitalfields market, operated by the City of London. It is a wholesale market for fruit, vegetables and flowers. Whilst generally in very good condition the City has taken the decision to consolidate its three wholesale markets into a new single site in Barking and Dagenham. The timeframe for this move is unclear at present, however it is now clear that over the plan period the Sherrin Road Site will become vacant and available for development.

The Site extends c.11.9 ha and is situated to the north of Stratford. BEA 2 is accessed via the A106, which itself directly connects to the A12, presenting excellent links to central London, Essex and Suffolk. The Site benefits from an established pedestrian route to Stratford International Station via the Olympic Park (1 mile), and connections to Lea Bridge Station (1.5 miles). Generally, Sherrin Road's close access to the A12 makes it attractive to industrial tenants.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	The Mayor and Commonality of The City of London	29.3	11.9

Table 14: Largest Landowners – BEA 2

Source: Nimbus, 2020



Figure 35: Largest Landowners Map – BEA 2

Source: Nimbus, 2020

The land within BEA 2 is made up entirely of one land parcel, with the freehold owned by The Mayor and Commonality of The City of London. With this in mind, there are no owner-occupiers within the employment area.

Notwithstanding this, there are a significant number of leases on the Site, as demonstrated by the numbers identified within the green circles in Figure 35. Nimbus records a total of 113 leaseholders with lease lengths exceeding 7 years. The vast majority of these operate as food suppliers. Examples include J and J Parsons Limited, Evergreen (Spitalfields) Limited and Euro Fresh Limited. Beyond these uses, it is worth noting the presence of several cafés on the Site with Café Plus, Dinoi's Café and Sabaa Pizza and Grill all servicing the working population in the area. Du Bois Enterprises Limited present a rare example of a non-food related industry, operating in construction.

Condition of existing stock



Figure 36: Building Age Map – BEA 2

Source: Nimbus, 2020

The properties mainly comprise of one and two storey brick buildings. Uses range from warehousing to storefront retail, housing the aforementioned

3.3 BEA SITES

cafés. The majority of the stock at Sherrin Road is in reasonable condition with build completion dates ranging from 1990 to 2000.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	371,795	9
2010 +	0	0

Table 15: Size and age of stock – BEA 2

Source: Costar, 2020

Size of properties

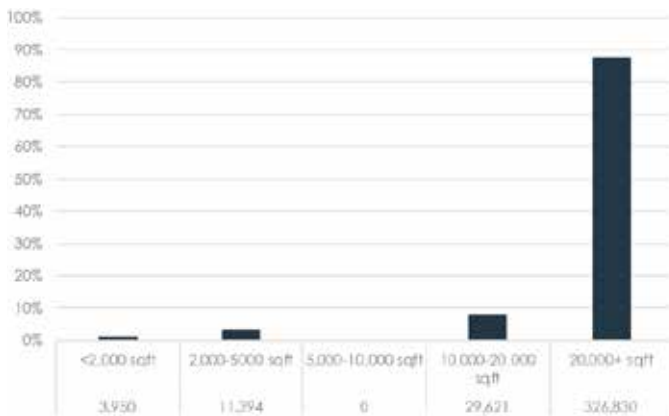


Figure 37: Size of stock (sqft) – BEA2

Source: Costar, 2020

The floorspace figures are heavily weighted towards the largest size category as a result of the main New Spitalfields Market building, which accounts for 304,840sqft, far in excess of any other unit represented. Despite this, the properties within this building are subdivided into smaller units, as reflected in the quantity of leases.

Total sqft	3,950	11,394	0	29,621	326,830
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	2	3	0	2	2

Table 16: Size of stock – BEA 2

Source: Costar, 2020

Utilisation of land and site

The areas highlighted in yellow represent parcels of land which are considered to be underutilised and could be incorporated into a new scheme to make more efficient use of the land. This includes large swathes of open forecourt, surface car parking or brownfield land.

Across the BEA area the land does not seem to be intensively used, however we understand New

Spitalfields market to contain vehicle parking/yard space for its distribution and retail tenants. If buyer and retailer car parking is reduced, there could be potential to better rationalise the plot.



Figure 38: Underutilised land – BEA 2

Source: Avison Young analysis, 2020

Uses

There are a number of occupiers within the BEA, with over 100 tenants offering a wide variety of Food (mainly fresh vegetables and fruit) and fresh produce such as flowers.

The mix of activities and their operations implies that there are opportunities to consider co-location. Potential light industrial uses such as food distribution could be delivered.

Servicing

The Site has immediate access to the A12, presenting excellent connectivity. There are good servicing roads, providing necessary support for HGV movement. Upon initial investigation, roads do not appear particularly congested, enhancing local connectivity. The local road network becomes more constricted further east along Eastway, presenting greater challenges to HGVs. However, on the whole, local connectivity is excellent.



Figure 39: Servicing - BEA 2

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Given that the wholesale market will be relocated in the near future (with the complexity of the leases diminishing with the sale of the Site) – the Site presents a good opportunity to consider industrial intensification. Given the excellent strategic road network and size of the Site, there is an opportunity to deliver either co-location with other employment uses or a standalone development.



Figure 40: Areas of opportunity for Intensification – BEA 2

Source: Avison Young analysis, 2020

3.3 BEA SITES

BEA 5 – ETLOE ROAD/SIMONDS ROAD



Figure 41: BEA 5 – Etloe Road/Simonds Road

Source: LBWF Employment Land Study, 2015

Location and context

Etloe Road/Simonds Road is shown in Figure 41. The Site extends c.2.2 ha and is situated north east of Hackney Marshes, approximately 0.6 miles east from Lea Bridge station. The Site is accessible via Wiseman Road. The immediate road network is fairly poor, with access to Orient Way via Marsh Lane.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Sun Life Assurance Company of Canada (U.K.) Limited	2.54	1.02
2	Capital Industrial Three B.V.	1.79	0.72

Table 17: Largest Landowners – BEA 5

Source: Nimbus 2020



Figure 42: Largest Landowners – BEA 5

Source: Nimbus, 2020

The land within BEA 5 is divided into 6 land parcels, and is held within 5 freehold ownerships. The two largest sites account for around 72% of the Site.

There is one owner-occupier within the BEA, occupied by Factory Setting. According to Nimbus there are 12 long leaseholders (meaning leases which are seven years or longer).



Figure 43: Building Age Map – BEA 5

Source: Costar, 2020

The properties mainly comprise small brick warehouses spanning 1 to 2 floors. There are two industrial parks – Leyton Business Centre and Orient Industrial Park. CoStar details that properties were built between 1984 and 1989, and that they are in reasonable condition.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	130,607	4
2010 +	0	0

Table 18: Size and age of stock – BEA 5

Source: Costar, 2020

Size of properties

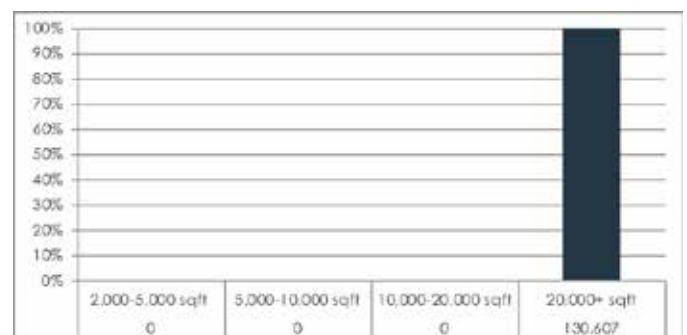


Figure 44: Size of stock (sqft) – BEA 5

Source: Costar, 2020

The four property floorspace are above 20,000 sqft and it seems to be subdivided into several smaller units.

Total sqft	0	0	0	0	130,607
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	0	0	4

Table 19: Size of stock – BEA 5

Source: Costar, 2020

Utilisation of land and site

Across BEA 5 the land is fairly intensively used. The wide servicing roads and shared yards are well utilised and support the activities of the occupiers. We do not believe there is any underutilised land.



Figure 45: Underutilised land – BEA 5

Source: Avison Young analysis, 2020

Servicing

Access to the Site is via Etloe Road. Etloe Road is shared with residential uses to the east and therefore can be quite congested at times. Natural barriers to the south, west and north mean there are limited road networks on this site.



Figure 46: Servicing – BEA 5

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Leyton Business Centre and Orient Industrial Park are within good condition and are well occupied. The employment areas perform well as an industrial location, serving a wide range of businesses. We do not see any potential to increase capacity on this Site.

3.3 BEA SITES

BEA 6 – CHURCH ROAD

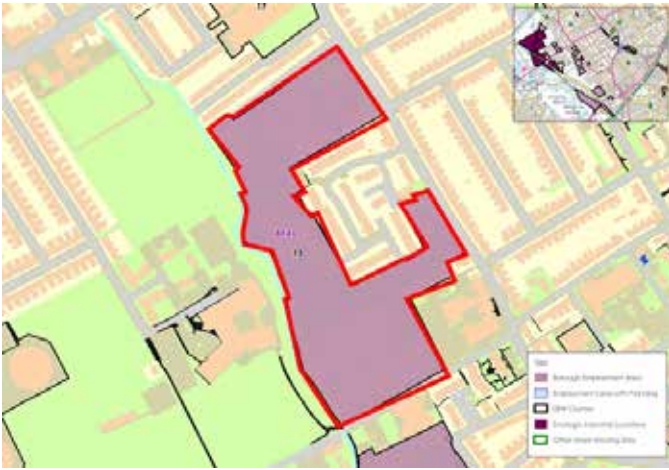


Figure 47: Church Road – BEA 6

Source: LBWF Employment Land Study, 2015

Location and context

Church Road is shown in Figure 47. The site extends c.5.4 ha and is situated west of Leyton and east of Lea Bridge. The Site is south of the A104 and is accessible via Church road (approximately 0.5 miles south east of Lea Bridge train station). Generally, it is surrounded by many residential properties and does not have many large roads, which may prove challenging for occupiers with larger fleets.

Nature and Extent of Landownership



Figure 48: Largest Landowners – BEA 6

Source: Avison Young, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
1	Rvl Properties Limited	3.12	1.26
2	Percy Ingle Services Limited	1.5	0.6

Table 20: Largest landowners – BEA 6

Source: Nimbus 2020

BEA 6 is divided into 13 land parcels, and seven freehold ownerships. The two largest freeholder parcels account for 35% of the site.

To the best of our knowledge, there are no owner-occupiers within the BEA. According to Nimbus, the site contains c.12 long leaseholders. The largest business activity (by number of leases) is the manufacturing and production of Food. The second largest business activity (by number of leases) is 'Waste & Recycling' and 'Construction'.

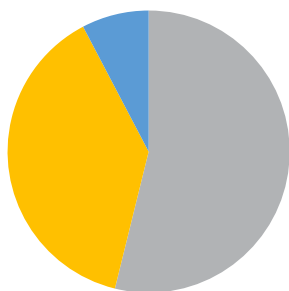
Condition of existing stock



Figure 49: Building Age Map – BEA 6

Source: Nimbus, 2020

The properties mainly comprise two storey brick buildings with low eaves heights. The age of properties ranges from more dated stock, delivered between 1951 and 1980, to more modern buildings delivered between 1981 and 2018. The building (Regent 88, Church Rd - completed in 2018) is a metal construction office space over 4 floors, highlighting the recent demand for non-industrial uses, indicating potential for co-location.



■ Pre 1900s ■ 1901-1950 ■ 1951-1980 ■ 1981-2010 ■ 2010+

Figure 50: Age of stock – BEA 6

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 – 1980	145,279	7
1981 – 2010	107,956	5
2010 +	23,648	1

Table 21: Size and age of stock – BEA 6

Source: Costar, 2020

Size of properties

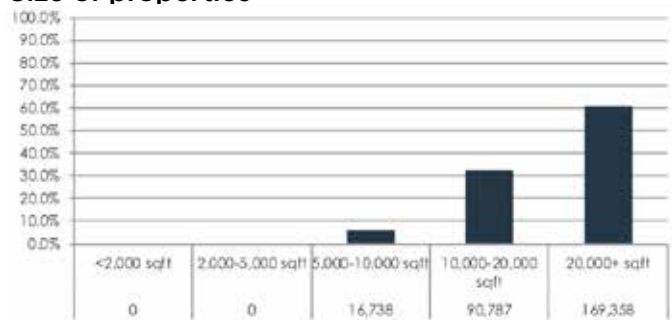


Figure 51: Size of stock (sqft) – BEA 6

Source: Costar, 2020

Around 60% of the total floorspace is above 20,000 sqft, whilst around one third of the total floorspace falls in the 10,000-20,000 sqft range. However, most of the individual properties fall within the medium range of 10,000 - 20,000 sqft. The majority of the larger warehouses have been subdivided into smaller units.

Total sqft	0	0	16,738	90,787	169,358
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	3	6	4

Table 22: Size of stock – BEA 6

Source: Costar, 2020

Utilisation of land and site

The open land within the BEA is predominantly used for waste and recycling. There are a cluster of properties and associated open space (240a, 240-242 and 236-238 Church Road) which do not appear to be intensively used and could be consolidated and rationalised.



Figure 52: Underutilised land – BEA 6

Source: Avison Young analysis, 2020

Uses

As aforementioned, BEA 6 is dominated by waste and recycling activity. This is challenging to co-locate with other industrial, employment and residential uses due to the noise and air pollution associated with the operations.

We are aware that the ATS Garage (236-238 Church Road) is now closed, which provides an opportunity to consider this plot for co-location. Given the residential landscape to the north, east and south, co-location with residential may be appropriate.

To the south of the BEA there is Percy Ingle Bakery and GBN self-storage. There is potential to consider co-location with GBN self-storage as its operations are minimal, however, this is unlikely to be the case with the Bakery.

Servicing

BEA 6 has a poor strategic road network, with the North Circular situated quite a distance from the Site. The intersection (positioned north of the Site) at Church Road and Lea Bridge Road can become quite congested. Internal servicing roads are poor, and are not suitable for HGV's. Moreover, the internal road network is disconnected due to the waste activity in the middle of the Site.

3.3 BEA SITES



Figure 53: Servicing – BEA 6

Source: Avison Young, 2020

Areas of opportunity for Intensification

Generally, land is fairly well utilised across the Site as a whole, the complexity of ownership structures is deemed moderate, and stock is fairly dated. The existence of waste and recycling activity within the Site does present challenges to intensification and co-location. However, there does appear to be some underutilised land with potential to consolidate and rationalise in the northern portion of the BEA. This generally aligns with some of the BEAs more dated stock, presenting a potential opportunity. In the south, whilst the nature of the Bakery's existing activity would make co-location challenging here, we believe there could be some opportunity for co-location in the vicinity of the existing GBN Self-Storage facility.



Figure 54: Areas of opportunity for Intensification – BEA 6

Source: Avison Young Analysis, 2020

ownerships, as shown in Table 23 and Figure 56. This includes BNP Paribas, Palmbest Limited and United UK 2019 PROPCO 4 S.A.R.L.

According to Nimbus data, the Site contains 11 long leaseholders, with leases extending at least 7 years. Business activities are made up predominantly of convenience retail (Aldi) and trade counters (Screwfix and Topps Tiles) and food and beverage wholesalers and caterers (Delenco Foods Limited, A to Z Catering LLP, UK Food Supplier). The Site is also home to a Kwik Fit (car garage).

Condition of existing stock

In line with the varied nature of occupiers, building types on the Site is varied. The properties mainly comprise 2 storey units, of brick and metal construction. However, unit sizes vary with some smaller light manufacturing units, medium sized warehouses, and a large supermarket on Site.

The majority of the properties were completed between 1970 and 2000, although there is no available data on build completion dates for two of the 7 units on Site. We would anticipate that these units have similar build completion dates to the highlighted units on Site.

Year Range	Total sqft	Total units
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Figure 57: Building Age Map – BEA 7

Source: Nimbus, 2020

BEA 7 – HEYBRIDGE WAY



Figure 55: Heybridge Way – BEA 7

Source: LBWF Employment Land Study, 2019

Location and context

Heybridge Way is shown in Figure 55. The Site extends c.2.1 ha and is situated approximately half a mile east of Lea Bridge Station. The site is accessible via the A104, providing reasonable links to the North Circular. Generally, its close proximity to some significant residential areas, with strong public transport accessibility via Lea Bridge Station makes it attractive for retail and light industrial uses.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Palmbest Limited	2.4	1.0
2	United UK 2019 PROPCO 4 S.A.R.L	0.5	0.2
3	BNP Paribas Depository Services (Jersey) Limited	1.6	0.6

Table 23: Largest landowners – BEA 7

Source: Nimbus, 2020



Figure 56: Largest Landowners Map – BEA 7

Source: Nimbus, 2020

3.3 BEA SITES

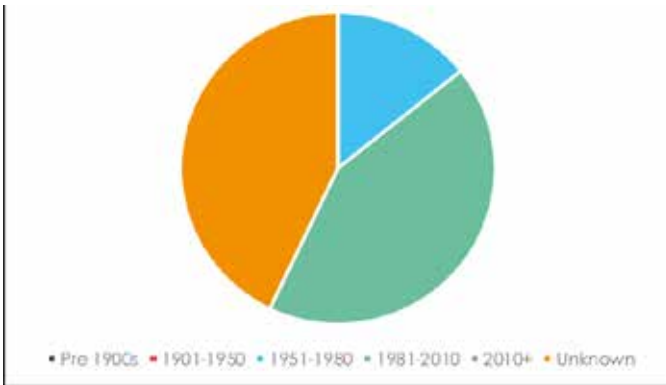


Figure 58: Age of stock – BEA 7

Source: Costar, 2020

Age Group	Units	sqft
Pre 1900s	0	0
1901 - 1950	625	0
1951 - 1980	15,207	1
1981 - 2010	88,102	3
2010 +	0	0

Table 24: Size and age of stock – BEA 7

Source: Costar, 2020

Size of properties

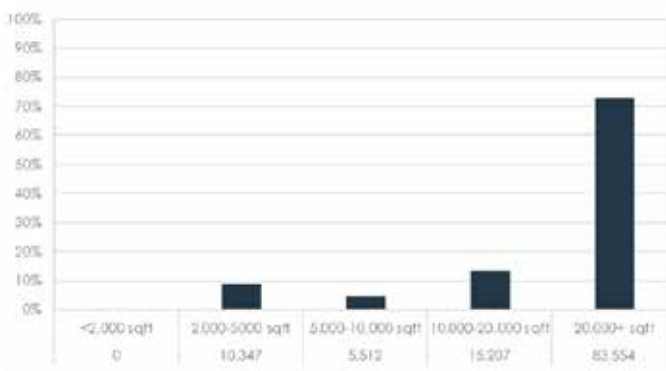


Figure 59: Size of stock – BEA 7

Source: Costar, 2020

Figure 59 shows that the majority of the floorspace on the Site falls within the 20,000sqft category. One of these larger units is Aldi, situated in the south east corner of the Site. It's worth noting that the other large unit on the Site, is Lea Bridge Industrial Centre which has been subdivided into a number of smaller units.

Total sqft	0	10,347	5,512	15,207	83,554
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	3	1	1	2

Table 25: Size of stock – BEA 7

Source: Costar, 2020

Utilisation of land and site



Figure 60: Underutilised land – BEA 7

Source: Avison Young analysis, 2020

Overall, the land is intensively used and it may be difficult to consider intensification from an underutilisation land perspective. Existing units are arranged in a conventional linear format and are serviced by a central access road and shared yard space. Existing plot ratios are clearly high, and aside from multi-storey development on existing floorplates, it's challenging to envisage more intensive use of the land than is currently in operation.

Uses

As aforementioned, uses on the Site encompass retail, and food supply businesses. Aldi occupies the largest individual, undivided unit on the Site (30,802 sqft) in the south eastern corner, running adjacent to Lea Bridge Road. Other key retail uses on the Site include Topps Tiles UK and Screwfix Direct, both situated in the Sites south western corner.

Activities in the northern section of the Site are more industrial in nature, however use intensity remains fairly light. Units are typically occupied by food suppliers in this section of the Site, with occupiers including A to Z Catering LLP, Delenco Foods Limited, UK Food Supplier and Imex Leyton.

Given that the current activity within the properties on the Site is retail/wholesale-orientated there is scope to consider co-location with industrial and other employment uses. Moreover, looking forward to the future of wholesale activity, there is potential

scope to provide some residential units on the Site. Whilst not an ideal mix of uses at present, the declining future role of HGVs in wholesale activity will likely be a crucial determinant of the potential to co-locate food suppliers with residential uses. However, in considering any form of colocation, thought will need to be given to development configuration given the well-utilised nature of land on the Site at present.

Servicing

The Site has immediate access to the A104, but poor connectivity to the main distributor network (North Circular, A12). The strategic road network is poor, with narrow roads lining the Site on either side, presenting challenges to HGVs. The current servicing roads can support HGV movement, but space remains at a premium – especially with roadside parking. Lea Bridge Road can become quite congested as it is shared with residential uses

within one ownership and fairly dated). Given the context, strategic road network and current activity there may be scope to consider co-location with other employment uses. However given the nature of the freeholder and the current activity present, it is likely that this Site will continue to function as is; there is very limited scope to increase capacity at this location.



Figure 61: Servicing – BEA 7

Source: Avison Young analysis, 2020

Planning Applications

There have been no planning permissions granted on the Site in the last 5 years (June 2015-June 2020).

Areas of opportunity for intensification

The Site currently functions fairly well as an employment area with the exception of the southern proportion loss to retail and trade counter uses.

Within the BEA, the most obvious plot would be the strip of warehouses that back onto Liden Close. This is fairly dated (1950s to 1980s stock) and is within one ownership; BNP Paribas. The other opportunity would be the warehouses on the other side (also

3.3 BEA SITES

BEA 9 – SUTHERLAND ROAD



Figure 62: Sutherland Road – BEA 9

Source: LBWF Employment Land Study, 2015

Location and context

Sutherland Road BEA is shown in Figure 62. The Site extends c.4.9 ha and is situated east of Walthamstow Wetlands; approximately 0.5 miles north-west from Blackhorse Road train station. The Site is accessible via the A503 and Blackhorse Lane (B179). The Site sits next to Blackhorse Lane SIL, and has similar strategic road network characteristics. The south of the Site, Webbs Industrial Estate, has been cleared with proposals for a mixed use scheme to come forward.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	GLA Land and Property Ltd	4.24	1.71
2	Christian Action (Enfield)	1.4	0.56

Table 26: Largest Landowners – BEA 9

Source: Nimbus, 2020



Figure 63: Largest Landowners – BEA 9

Source: Nimbus, 2020

The land within BEA 9 is divided into 26 land parcels, and is held within 20 freehold ownerships. The two largest freeholders account for 46% of the Site.

There are no owner-occupiers within BEA 9. According to Nimbus there are 34 long leaseholders. This implies that there is likely to be a layer of complexity in consolidating the Site for redevelopment. Within BEA 9, there are a wide range of business activities, but predominantly (by number of leases) businesses are associated within the manufacturing and, storage and distribution. Examples include Euro Leisure Wear, a clothing warehouse and Local Honey Man, a supplier of bespoke honey.

Condition of existing stock

The properties mainly comprise of single storey brick buildings. They are generally of poor quality and appear to be quite dated. The configuration of the properties and the subdivision within that infers that stock in this location will be more suited to occupiers in need of small floorplates. Blackhorse Lane Studios is the oldest stock on the Site, having been constructed in the 1960s. However, it is well used and is occupied by Blackhorse Lane Ateliers which suggest that it may have been refurbished to accommodate the current occupier's needs.



Figure 64: Building Age Map – BEA 9

Source: Costar, 2020

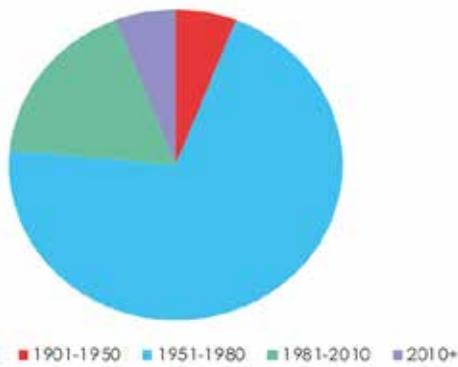


Figure 65: Age of Stock – BEA 9

Source: Avison Young, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	12275	1
1951 - 1980	149,244	12
1981 - 2010	35,974	3
2010 +	924	1

Table 27: Size and age of stock – BEA 9

Source: Costar, 2020

Size of properties

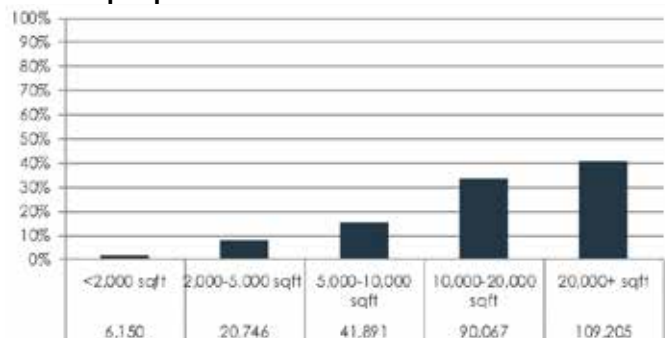


Figure 66: Size of stock (sqft) – BEA 9

Source: Costar, 2020

Most of the property floorspace falls within the 10,000-20,000 sqft category, specifically between 10,000 to 15,000 sqft, reflecting the smaller nature of units. Many of the properties are subdivided into small units.

Total sqft	6,150	20,746	41,891	90,067	109,205
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	4	6	6	7	3

Table 28: Size of stock – BEA 9

Source: Costar, 2020

Utilisation of land and site

Overall, the land is intensively used and there does not appear to be much opportunity from this perspective.



Figure 67: Underutilised land – BEA 9

Source: Avison Young analysis, 2020

Uses

There are a number of occupiers within BEA 9 including EE (telecommunications), Christian Action Housing Association (Housing Provider), Euro Leisure Wear (Clothing and Fabric manufacturers), and Blackhorse Lane studios (maker-space).

Within BEA 9 there is a diverse range of businesses from manufacturing (Euro Leisure Wear) who manufacture clothing and fabrics, Energy (GAS Production Hire) who produce commercial gas or Education (Acorn Day Opportunities), a nursery.

3.3 BEA SITES

The current mix of activities within the Site is relatively light. The presence of creative businesses and maker-spaces shows the transition of this Site from historic heavy manufacturing to smaller, lighter activities; a trend occurring in Blackhorse Lane SIL next door. The eastern extent of the Site has been redeveloped to provide residential – which demonstrates that co-location (to a degree) is possible. The redevelopment of the Webbs Industrial Estate to provide artisan workshops and residential shows the direction of travel in terms of the changing employment demand across the Site to provide small studios and workshops, instead of larger floorplates.

As BEA 9 has a mixture of activities, it may be possible to consider co-location with other employment uses or potentially residential.

Servicing

The Site is accessible via Blackhorse Lane (B179) which can be challenging for HGVs due to other traffic on the road. Like Blackhorse Lane SIL, the strategic road network is relatively good.

The Site has very few internal servicing roads, and the majority of the industrial properties are either accessed off Blackhorse Lane (B179) or Sutherland Road. Due to the residential context, Sutherland Road can become quite congested.



Figure 68: Servicing – BEA 9

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

As we are aware, the former Webbs Industrial Estate has been purchased by the GLA for redevelopment to deliver new commercial floorspace and residential uses. Other than this plot to the south, the opportunities within the Site are limited. Much of the stock has been redeveloped for residential and the

older stock is occupied by creative businesses who are currently thriving. There does not appear to be any opportunity to increase the industrial capacity on this Site.

BEA 10 – CLIFFORD ROAD



Figure 69: Clifford Road – BEA 10

Source: LBWF Employment Land Study, 2019

Location and context

Clifford Road is shown in Figure 69. The c.1.4 ha Site is situated in Walthamstow, immediately north of the A503. Connections to the North Circular are good, with travel options via the A503 and Fulbourne Road. Moreover, public transport accessibility is strong with local connections via the Overground at Wood Street Station (0.5 miles away) and additional connections at Walthamstow Central (1 mile away) providing fast and effective travel to central London.

Despite good connectivity to the North Circular, the Site is surrounded by residential properties which may pose difficulties for occupiers with larger vehicles.

Nature and Extent of Landownership

BEA 10 is divided into 4 land parcels, within four



Figure 70: Largest Landowners – BEA 10

Source: Avison Young, 2020

separate freehold ownerships. The two largest freeholder parcels account for c.70% of the site.

There are no owner-occupiers within the BEA. According to Nimbus, the site contains c.39 long leaseholders.. It's interesting to note that a large proportion of these are institutional investors (Duffy Properties Ltd, P&O Property Holdings, Union Pension Trustees (Eastern) Limited, Ruthben Property Holding Company) rather than occupiers. The likelihood is that these investors are sub-letting the properties on shorter leases.

Aside from the large group of institutional investors, the largest business activity (by number of leases) are retail suppliers (B&W Trophies Ltd, Kard Kingdom Ltd, The Complete Blind Service Ltd).

Map Key	Freeholder	Size (acres)	Size (ha)
1	Private Owner	1.0	0.4
2	Wellzem Limited	1.4	0.6
3	Valebreck Limited	0.8	0.3

Condition of existing stock

Table 29: Largest Landowners – BEA 10

Source: Nimbus, 2020



Figure 71: Building Age Map – BEA 10

Source: Nimbus, 2020

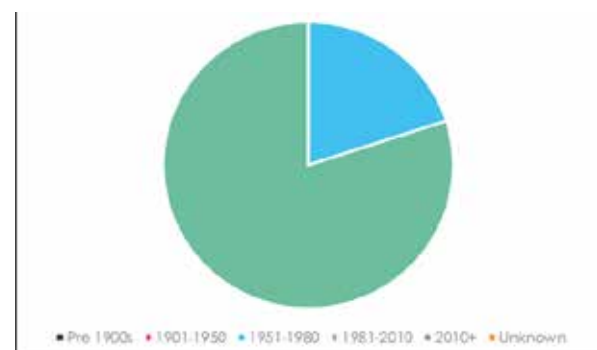


Figure 72: Age of stock – BEA 10

Source: Costar, 2020

3.3 BEA SITES

The properties mainly comprise two storey brick buildings with low eaves heights. The age of properties range between the oldest stock on Site, constructed in the 1950s and the more modern stock forming Walthamstow Business Centre, with build completion dates of 1980-2003. Costar does not provide data for every unit on the Site, and consequently some build completion dates remain unknown. However, given the appearance of stock, we don't anticipate that any high quality, modern stock is currently sited on the BEA. Table 30 presents the size and age of stock for the units that Costar does have data on.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	10,439	1
1981 - 2010	23,322	4
2010 +	0	0

Table 30: Size and age of stock - BEA 10

Source: Costar, 2020

Size of properties

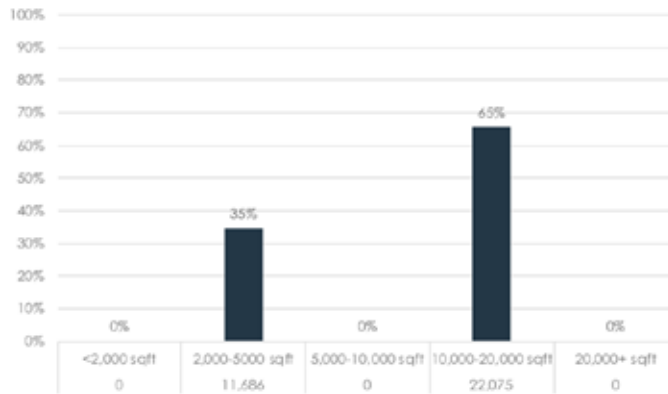


Figure 73: Size of stock (sqft) - BEA 10

Source: Costar, 2020

Around 65% of the total floorspace is above 10,000 sqft, whilst around one third of the total floorspace falls in the 2,000-5,000 sqft range. The majority of the larger warehouses have been subdivided into smaller units

Total sqft	0	11,686	0	22,075	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	3	0	2	0

Table 31: Size of stock - BEA 10

Source: Costar, 2020

Utilisation of land and site

The area at the north western extent of BEA 10 appears to be used as an open storage and scrap yard, that may have the potential to be reconfigured to allow for additional capacity to be focussed here. However, we are unable to determine who may be operating this Site and in its present use would not be deemed suitable for co-location. Therefore, the opportunity from an underutilised land perspective could be considered fairly limited.



Figure 74: Underutilised land - BEA 10

Source: Avison Young analysis, 2020

Uses

As aforementioned there are no owner-occupiers within BEA 10. Moreover, a significant number of the leaseholders are pension funds and property investment companies who sublet their properties.

In terms of activities, the BEA is made up predominantly of retail suppliers and light manufacturing activity. Tenants include the Complete Blind Service, Wilding Sound Ltd, Net Kitchens Direct, Bespoke LDN Events and Décor, and World of Health and Leisure. Beyond this, the north-west corner of the Site is home to several television companies.

The Site is surrounded by residential uses, and in line with this, the majority of activity on Site is deemed suitable for co-location. However, there appears to be some heavy industrial use (which we believe to be a scrap yard) in the north west corner of the Site which is not accounted for in the dataset. We are unable to find this property/yard on any of our datasets. This will require a site visit to ascertain the occupier.

Servicing

The Site has fairly good access to the North Circular via Forest Road (A503). However, access and egress for HGVs is challenging within the Site and in the immediate road network around it. It appears

that Roadside parking on Clifford Road presents a particular challenge to HGVs when accessing the Site. From what we are able to understand from typical traffic flow patterns, Forest Road (A503) can become quite congested as it shared with retail and residential uses.



Figure 75: Servicing - BEA 10

Source: Avison Young analysis, 2020

Areas of opportunity for intensification

The Site as a whole operates effectively, with good internal servicing roads and conventionally laid out stock. The Site can continue to operate effectively to service the local economy – the location of TV studios suggests it will be a strong Site to accommodate creative industries.

The heavy industrial use in the north west of the Site (which appears to be a scrap yard), is the only real opportunity on the Site to consider intensification. It's reasonably sized, could potentially accommodate an additional warehouse and provide something more in line with the rest of the stock on the Site to create a higher quality environment. However, given that the occupier is unknown, the use appears to be a scrap yard and the access is challenged – it may be suitable to consider the plot. Therefore, there is no opportunity for this Site.

3.3 BEA SITES

BEA 11 – WALTHAM PARK WAY



Figure 76: Waltham Park Way – BEA 11
Source: LBWF Employment Land Study, 2019

Location and context

Waltham Park Way is shown in Figure 76. The c.2.9 ha Site sits less than a mile to the east of Banbury reservoir. Road connections to the Site are excellent with immediate access to the North Circular via the Crooked Billet roundabout. The Site is less accessible by public transport. The closest stations include: Highams Park (1.3 miles), Blackhorse Road (1.7 miles) and Walthamstow Central (1.7 miles).

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	CEP CBRE UK Property Nominee 1 LTD	7.1	2.8
2	JDS (Walthamstow) Limited	0.2	0.1

Table 32: Largest Landowners Key

Source: Nimbus, 2020



Figure 77: Largest landowners – BEA 11
Source: Nimbus, 2020

However, there is a fairly complex overlaying lease structure, with 13 long leases on Site. The business activity present on the Site is predominantly trade counters; Industrial Tool Supplies Limited, City Plumbing Supplies Holdings Limited, Luda Constructions Ltd, and Travis Perkins.

Condition of existing stock



Figure 78: Building Age Map – BEA 11
Source: Nimbus, 2020

The properties mainly comprise one and two storey warehouses. At the south east corner of the Site, the existing Kwik Fit adjoins some residential units.

The stock within the Site is fairly dated, with the majority of units completed in the 1980s.

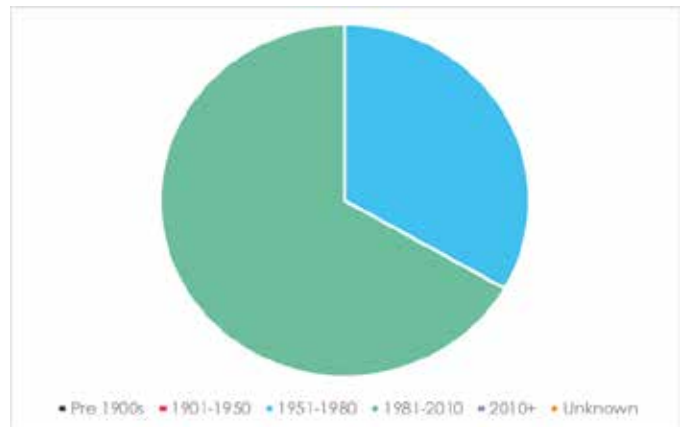


Figure 79: Age of stock – BEA 11

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	72,382	2
1981 - 2010	75,194	4
2010 +	0	0

Table 33: Size and age of stock – BEA 11

Source: Costar, 2020

Size of properties

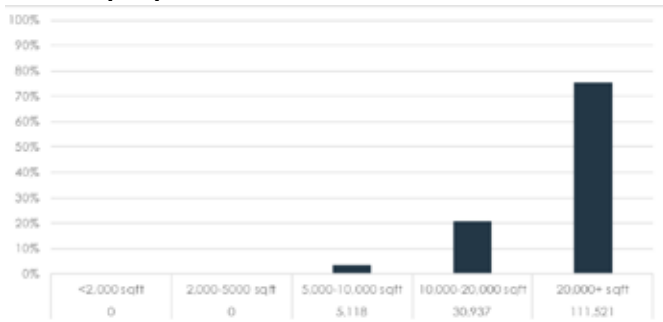


Figure 80: Size of stock (sqft)

Source: Costar, 2020

The stock within the BEA is large, with 76% of floorspace in the 20,000sqft+ category. This is attributable to three units, the largest of which, on Waltham Park Way comprises c. 67,000sqft of industrial floorspace. The building has been subdivided into smaller units.

Total sqft	0	0	5,118	30,937	111,521
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	1	2	3

Table 34: Size of stock

Source: Costar, 2020

Utilisation of land and site



Figure 81: Underutilised land – BEA 11

Source: Avison Young analysis, 2020

BEA 11 is fairly intensively used; however, there does appear to be some underutilised surface parking and open yard at the Site's eastern extent. This could be rationalised to create the opportunity to provide some additional industrial floorspace, however, this may present as a challenge in terms of the retaining HGV movement into the employment area. Therefore, this would not be suitable opportunity.

Uses

In line with the lease profile outlined above, the main uses in the BEA comprise trade counters, including Industrial Tool Supplies Limited, City Plumbing Supplies Holdings Limited, Luda Constructions Ltd, and Travis Perkins.

The existing use profile is fairly light in nature, and there is potential for co-location with other light employment uses, or residential given the residential character of the surrounding area. However, the location of the BEA, with direct access to the North Circular is well suited to distribution activity, and the impacts of access and egress for HGVs will have to be fully considered and understood before making any decision on co-location.

Servicing

The Site enjoys immediate access to the North Circular, presenting excellent connectivity. There are good quality internal servicing roads providing effective access and egress for HGVs. Billet Road (B179) can become quite congested as it is shared with residential uses and roadside parking, limiting the accessibility in the immediate area surrounding the Site



Figure 82: Servicing – BEA 11

Source: Avison Young analysis, 2020

Areas of opportunity for intensification

This Site is currently operating efficiently and effectively. With one landowner and fairly dated stock, the likelihood is that existing landowner will re-develop themselves when stock begins to reach obsolescence. Consequently, we do not believe at the point there is scope to consider additional capacity at this Site.

3.3 BEA SITES

BEA 12 – JUSTIN ROAD/TRINITY WAY



Figure 83: Justin Road/Trinity Way – BEA 12

Source: LBWF Employment Land Study, 2015

Location and context

Justin Road is shown in Figure 83. The c.3.2 ha Site sits immediately east of Banbury reservoir. Road connections to the Site are excellent with immediate access to the North Circular via Trinity Way. The Site is less accessible by public transport. The closest stations include: Highams Park (1.5 miles), Blackhorse Road (2.3 miles) and Walthamstow Central (1.9 miles).

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Bishopsgate Long Term Property Fund Nominees Limited	2.9	1.2
2	Chiltern Properties Limited	2.5	1.0
3	Leicestershire County Council	0.7	0.3

Table 35: Largest Landowners Key

Source: Nimbus, 2020



Figure 84: Largest Landowners

Source: Nimbus, 2020

Justin Road BEA is made up of seven land parcels over 0.1 acres. The largest three freeholders, outlined in Table 35, make up 77% of the total land on the Site.

According to Nimbus, there are seven long leaseholders. Business activities are varied, encompassing Property related services (NPS London Limited, MNM Property Services), cleaning services (Knighton Cleaning Services Limited, VCLEAN Life Ltd) and banking (Barclays Services Ltd).

Condition of existing stock



Figure 85: Building Age Map – BEA 12

Source: Nimbus, 2020

The properties mainly comprise of single storey warehouses, configured to suit smaller occupiers. We note that within the Site there is a mix of typologies present. This includes a large warehouse, servicing yard and car park to the south of the Site occupied by Selco, a row of light industrial warehouses with shared serving yard to the north, and five office buildings and associated car parking situated along the eastern section of the Site.

The stock within the Site is quite dated, with completion dates ranging from the late 1950s to early 1960s.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	20,448	1
1981 - 2010	75,003	6
2010 +	0	0

Table 36: Size and age of stock – BEA 12

Source: Costar, 2020

Size of properties

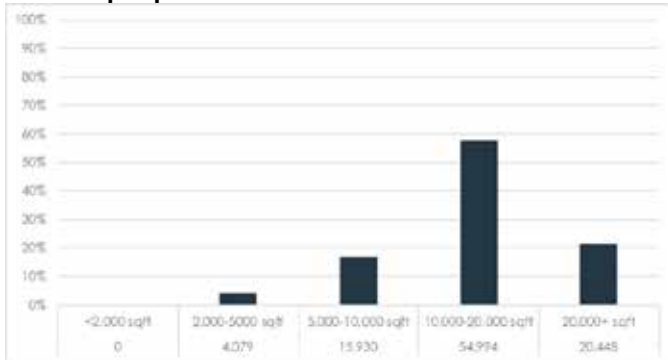


Figure 86: Size of stock (sqft) – BEA 12

Source: Costar, 2020

Around 60% of the property floorspace falls within the 10,000-20,000 sqft range. The majority of the properties have been subdivided into smaller units thus indicating the type of demand within this Site.

Total sqft	0	4,079	15,930	54,994	20,448
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	1	2	4	1

Table 37: Size of stock – BEA 12

Source: Costar, 2020

Utilisation of land and site



Figure 87: Underutilised land – BEA 12

Source: Avison Young analysis, 2020

The land highlighted in Figure 87 is used as parking and open storage by Selco. Although this supports their business activity at present, the current Selco facility is a potential opportunity, particularly as the builders' merchant sector changes with more direct delivery and less stock held on site. This presents a parcel of underutilised land that could provide grounds for re-development without extensive re-configuration.

Uses

The current occupiers include Builders merchants (Selco), print and media (MJR Printers, PrintExpert, Alternative Enterprises) and creative industries (Do it creative, MTF Services).

Given the light nature of uses, there could be potential to co-locate industrial and other employment uses with the existing businesses on Site. The residential context within which the Site sits also poses some opportunity to co-locate existing uses with residential.

Servicing

The Site enjoys immediate access to the North Circular, presenting excellent connectivity. There are good quality internal servicing roads providing effective access and egress for HGVs. Upon initial investigation, roads do not appear particularly congested, enhancing local connectivity.



Figure 88: Servicing – BEA 12

Source: Avison Young analysis, 2020

3.3 BEA SITES

Areas of opportunity for Intensification

The Selco plot could present some opportunity with changing trends. The building merchant's industry is likely to see changes with more direct delivery and less stock held on Site. This could perhaps free up some land to provide additional industrial floorspace. Given the current uses on Site and the excellent connectivity, the opportunity could be in the form of a distribution use (final mile) or light industrial warehouses.



Figure 89: Areas of opportunity for intensification – BEA 12

Source: Avison Young analysis, 2020

BEA 13 – HIGHAMS PARK



Figure 90: Highams Park – BEA 13

Source: LBWF Employment Land Study, 2015

Location and context

Highams Park is shown in Figure 90. The Site extends c.5.7 ha and is situated immediately south west of Chingford Hatch and c.400 meters north west of Highams Park train station. BEA 13 is situated within a predominantly residential context but can be considered relatively well connected due to its access via the B160 which leads to the A406 and M11.

Nature and Extent of Landownership



Figure 91: Largest landowners – BEA 13

Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
1	BNP Paribas Depository Services (Jersey) Limited	4	1.6
2	Centrica Combined Common Investment Fund Limited	3.9	1.57

Table 38: Largest landowners – BEA 13

Source: Nimbus, 2020

Highams Park is divided into seven land parcels and is within five freehold ownerships. However, 50% is held within two ownerships as shown in Table 38. The largest freeholder is BNP Paribas.

We believe that there are two owner-occupiers (Shurgard and Elite Truck Training Ltd). According to Nimbus, there are 14 long leaseholders (meaning leases which are seven years or longer) within the BEA, most of which are within 11 Jubilee Avenue. The largest business activity is Trade counters.

Condition of existing stock

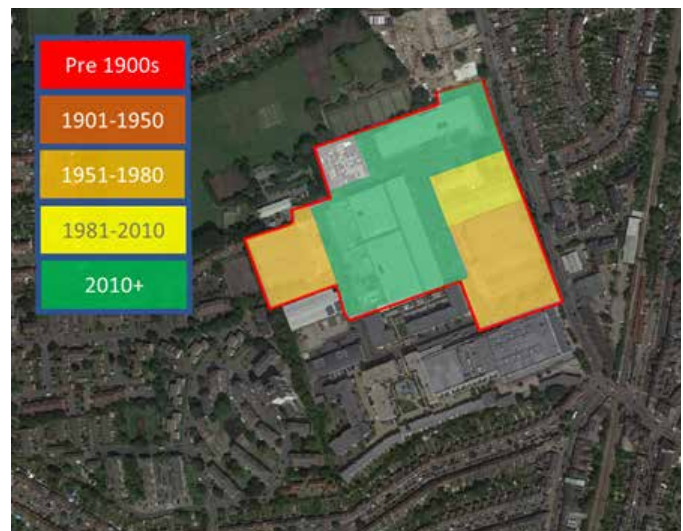


Figure 92: Building Age Map – BEA 13

Source: Costar, 2020

The properties mainly comprise warehouses of two to three storey construction. The properties are small structures with low eaves heights. The land within the BEA appears to be intensively used. The properties within Highams Park are fairly modern, with 43% of the stock completed in 2010. In 2015 a new warehouse was constructed, and occupied by Shurgard (13 Hickman Avenue), which highlights demand for storage space in this location.

3.3 BEA SITES

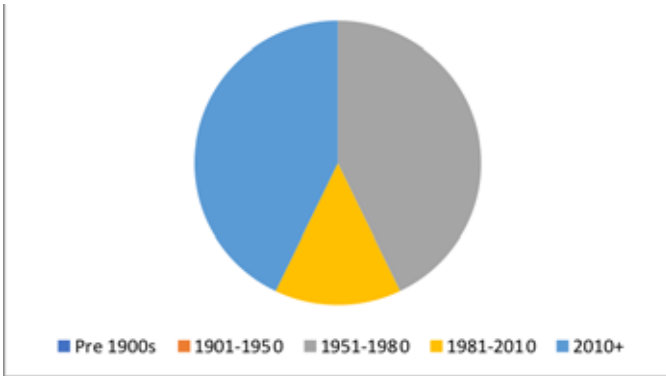


Figure 93: Age of stock - BEA 13

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	124,123	2
1981 - 2010	199,004	4
2010 +	0	0

Table 39: Size and age of stock - BEA 13

Source: Costar, 2020

Size of properties

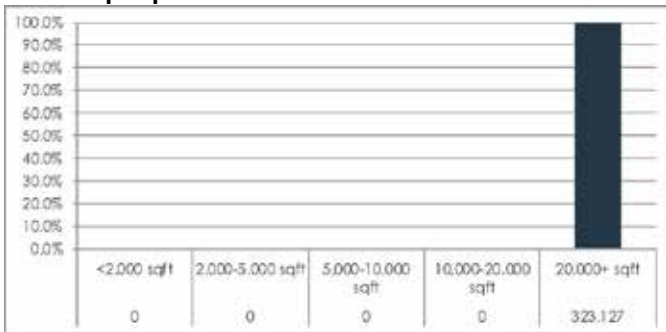


Figure 94: Size of stock (sqft) - BEA 13

Source: Costar, 2020

All of the properties are above 20,000 sqft. The properties are predominantly large warehouses, with around two thirds of them subdivided into small units. The largest properties are all on Jubilee Avenue spanning sizes of c.84,000 sqft; c.71,000 sqft and 69,000 sqft.

Total sqft	0	0	0	0	323,127
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	0	0	6

Table 40: Size of stock - BEA 13

Source: Costar, 2020

Utilisation of land and site



Figure 95: Underutilised land - BEA 13

Source: Avison Young analysis, 2020

The land within BEA 13 is relatively intensively used with yards appearing to be suitably sized and fit-for-purpose to allow for vehicle movement and loading/unloading only. There could be an opportunity to reorganise/rationalise the car park within the north-east of the Site to create the opportunity to deliver greater industrial capacity.

Uses

Occupiers within the BEA include trade counters along Jubilee Avenue and within Circular Point, Argos Retail Hub, and small-scale distribution-orientated activities along Hickman Avenue. It is feasible to consider co-location with industrial and other employment uses with these activities. Example could include lighter industrial/office activities stacked above. In the short term, this would be with the exception of Circular Point which appears to be fairly modern, and therefore unlikely to be considered appropriate for redevelopment.

Servicing

BEA 13 is situated in close proximity to the North Circular (just to the south of the Site), accessed via Winchester Road and Wadham Road. Notwithstanding this, Winchester Road can be extremely congested during peak hours. Internal servicing roads are wide and would support HGV movement.



Figure 96: Servicing – BEA13

Source: Avison Young, 2020

Areas of opportunity for Intensification

Land ownership is fairly consolidated across the Site, with some more dated units at the Sites eastern and western extent. There could be opportunity to consider intensification within these areas, highlighted below.



Figure 97: Opportunities for intensification

Source: Avison Young Analysis, 2020

3.3 BEA SITES

BEA 14 – MONTAGUE ROAD/COURTNEY ROAD ARCHES



Figure 98: Montague Road/Courtney Road Arches - BEA 14

Source: LBWF Employment Land Study, 2019

Location and context

Montague Road/Courtney Road Arches is shown in Figure 98. The site extends c.0.4 ha and is situated approximately 1.5 miles north east of Stratford. The Site is accessed via the B161, providing connecting links to the A12. However, given the residential nature of the area, and the convoluted local road network, the area is not deemed suitable for HGVs or distribution activity.

Public transport connectivity is good, with Leytonstone High Road station (less than half a mile away) and Leyton Station (just over a mile away) both within walking distance.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Nagrecha Brothers Limited	0.34	0.25

Table 41: Largest landowners - BEA 14

Source: Nimbus, 2020



Figure 99: Largest landowners - BEA 14

Source: Nimbus, 2020

Data from Nimbus only indicates one freehold owner within the Study area; Nagrecha Brothers Limited in the north east of the employment area. It should be noted that, although we are aware of the other plots, the freehold ownership is not registered on Land Registry. Given the proximity of the rail line and arches, we are inclined to believe the remainder of the Site is owned by Network Rail.

The Site contains 4 leaseholders, all of whom are recorded as CDR Nomineco Ltd. The business activity appears to be light industrial uses including small car dealerships and other automotive related uses.

Condition of existing stock

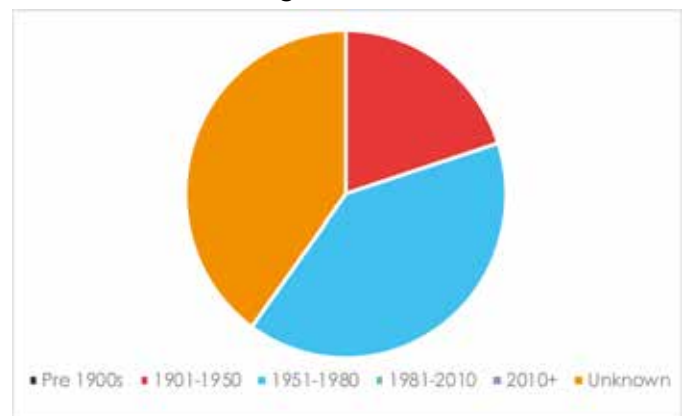


Figure 100: Age of Stock - BEA 14

Source: Costar, 2020

The properties mainly comprise small industrial units in railway arches. However, there is a c.8,000 sqft two storey unit in the north west corner of the Site that is currently occupied by a mechanic. We are aware that the Costar dataset underrepresents the number of units on Site, with far more railway arches present than is clear from the dataset.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	1,005	1
1951 - 1980	5,832	2
1981 - 2010	0	0
2010 +	0	0

Table 42: Size and age of stock - BEA 14

Source: Costar, 2020

Size of properties

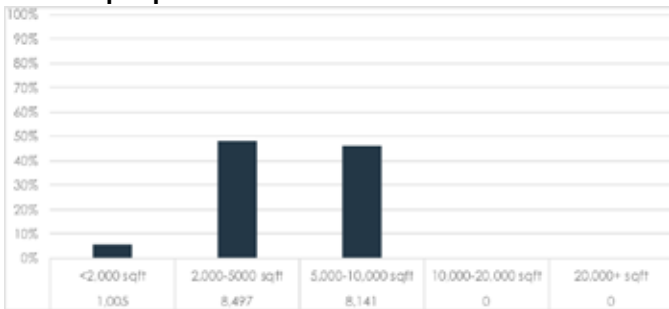


Figure 101: Size and age of stock (sqft) - BEA 14

Source: Costar, 2020

As the stock mainly comprises railway arches the units are generally small in size. There is just one unit over 5,000 sqft, located in the north west of the Site.

Total sqft	1,005	8,497	8,141	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	1	3	1	0	0

Table 43: Size of stock - BEA 14

Source: Costar, 2020

Utilisation of land and site



Figure 102: Underutilised land - BEA 14

Source: Avison Young analysis, 2020

Given the nature of existing unit typologies, intensification is challenging within BEA 14. However, there are some areas of underutilised yard servicing the railway arches highlighted in the north of the Site. Whilst this area is small, there could be some opportunity to provide additional industrial floorspace here. Additionally, there is an underutilised area highlighted to the South of the Site, running adjacent to the railway tracks. This area could be remediated and used to provide additional floorspace. However, given its proximity to residential uses, the scope to consider new development is limited.

Uses

There is an absence of data available on ownership within the BEA, and consequently, we do not have comprehensive knowledge of any owner occupiers, or tenants on the Site. However, it does that the existing uses including creative industries such as graphic design, light industrial uses including mechanics, and a car rental business.

As aforementioned, intensity of land use on the Site is inherently fairly high given the existing railway arch unit typologies. Therefore although the uses would allow for co-location with other employment uses, it may be challenging to deliver given the proximity to the railway arches.

Servicing

The Site has good access to A12 via High Road Leytonstone (immediate west of the Site).

The immediate road network serving the Site presents significant challenges to the egress of HGVs with roadside parking, and mini roundabouts. Future uses simply will not be able to support activities that require HGV access. It appears that Harrow Road can become quite congested as it is shared with residential uses.

3.3 BEA SITES



Figure 103: Servicing - BEA 14

Source: Avison Young analysis, 2020

Areas of opportunity for intensification

The Site is constrained due to the railway arches and there is no underutilised land to consider delivering additional industrial development. Therefore, we do not feel that this Site lends itself to be able to deliver additional industrial capacity.

BEA 15 – TEMPLE MILLS LANE



Figure 104: BEA 15 – Temple Mills Lane
Source: LBWF Employment Land Study, 2015

Location and context

Temple Hill Lane BEA is shown in Figure 104. The Site extends c.2.7 ha and is situated east of Hackney Marshes, approximately 0.3 miles south west from Leyton Underground station. The Site is accessible via both the A12 and A106. The Site is situated across from the New Spitalfields Market (BEA 2 – Sherrin Road). The excellent strategic road network makes the Site attractive for logistics and distribution activity.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	The Secretary of State for Transport	5.75	2.32

Table 44: Largest Landowners – BEA 15

Source: Nimbus, 2020



Figure 105: Largest Landowners – BEA 15

Source: Nimbus, 2020

The freehold within BEA 15 is wholly owned by The Secretary of State for Transport.

According to Nimbus there are 2 long leaseholders; the London Bus Services depot and the London Power Networks.



Figure 106: Building Age Map – BEA 15

Source: Costar, 2020

Although BEA 15 contains two buildings, Costar only lists one (the larger one in the north east of the Site). Nevertheless, we are aware that both units are used by TFL for their bus servicing operations. Costar dates the building(s) as being from 2012. The larger building is a three storey steel frame warehouse of high quality, the smaller building is around three storeys high with a large space for buses to park.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	0	0
2010 +	32,524	1

Table 45: Size and age of stock – BEA 15

Source: Costar, 2020

3.3 BEA SITES

Size of properties

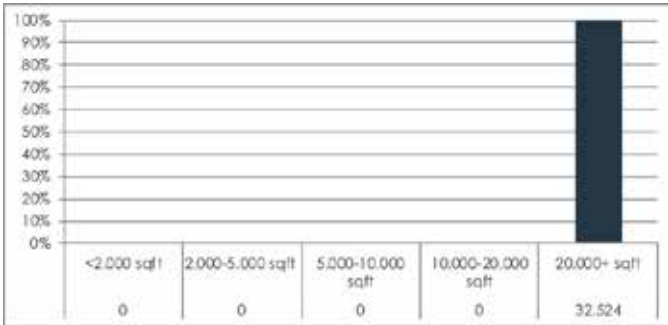


Figure 107: Size of stock (sqft) – BEA 15

Source: Costar, 2020

The property floorspace is above 20,000 sqft and it does not appear to be subdivided into smaller units.

Total sqft	0	0	0	0	32,524
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	0	0	1

Table 46: Size of stock – BEA 15

Source: Costar, 2020

Utilisation of land and site

Across BEA 15 the land is intensively used. In the south east portion of the Site, majority is open space – this is for vehicle servicing. Due to the number of buses serviced at the depot, it is challenging to consider reconfiguring the land to allow new development to be considered.



Figure 108: Underutilised land – BEA 15

Source: Avison Young analysis, 2020

Uses

The active use on the Site is the bus depot. Given the scale of operations and the importance of the asset to the bus network – it may not be suitable to consider co-location on this Site.

Servicing

The Site has excellent access to the A12 and A106. Temple Mills Lane runs along the western extent of Site which gives great servicing via the A12. The internal servicing roads are wide and are conducive to bus movement within the Site. The surrounding uses do not pose an issue for the road network.



Figure 109: Servicing – BEA 15

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Although there is currently a low density use within the Site and the ownership pattern is consolidated, the Site is an important infrastructure asset for the bus network. Re-provision of the space for existing activities would be necessary prior to any redevelopment. With no evidence to suggest a change in occupier needs - the Site does not present an opportunity to be considered for delivering increased industrial capacity.

BEA 16 – CABINET WAY



Figure 110: BEA 16 – Cabinet Way

Source: LBWF Employment Land Study, 2015

Location and context

Cabinet Way is shown in Figure 110. The Site extends c.2.2 ha and is situated immediately north-west of the Banbury Reservoir. It is around 1 mile east of Meridian Water train station and adjoins North Circular SIL immediately to its east. The Site is accessible via the North Circular (A406) which immediately adjoins the Site to its east and Walthamstow Avenue, which leads on to Cabinet Way. Generally its close access to the North Circular makes it attractive to the logistics and distribution occupiers.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Aviva Life & Pensions UK Limited	5.34	2.16

Table 47: Largest landowners – BEA 16

Source: Nimbus, 2020



Figure 111: Largest landowners – BEA 16

Source: Nimbus, 2020

The land within BEA 16 is owned by Aviva Life & Pensions UK Limited. There are no owner-occupiers within BEA 16. According to Nimbus there are 11 long leaseholders. Within the BEA, there are big box retailers and trade counters such as P & S Flooring Ltd, Dream Home Ltd, Halfords Autocentres, and B&Q.

Condition of existing stock



Figure 112: Building Age Map – BEA 16

Source: Costar, 2020

Deacon Trading Estate is arranged across 6 buildings, with some properties subdivided creating a total of 11 units. Deacon Trading Estate was built in 1985 and stock appears in reasonable condition.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	13,333	1
2010 +	0	0

Table 48: Size and age of stock – BEA 16

Source: Costar, 2020

3.3 BEA SITES

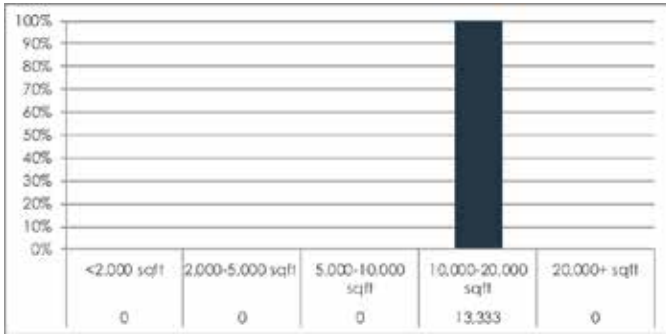


Figure 113: Size of stock (sqft) – BEA 16

Source: Costar, 2020

Size of properties

The listed properties fall within the 10,000-20,000 sqft size range and consist of a range of warehouse type buildings.

Utilisation of land and site

Across the BEA there are large surface car parks that could be better rationalised and consolidated. As the current uses are low density (aligned with the nature of their activity) there could be scope to consider multi-storey typologies at this location. Given the strategic road network, access to the North Circular, final mile uses on ground floor with light industrial uses or employment uses could be suitable.



Figure 114: Underutilised land – BEA 16

Source: Avison Young analysis, 2020

Uses

There are 11 occupiers within the BEA, mainly consisting of trade counters such as Halfords, P&S Flooring, B & Q or Multi-Tile, as well as retailers such as Dreams or Decatex.

It is possible to consider co-location with light industrial or other employment uses with these activities. This would likely have to be a multi-storey development due to the limited land to rationalise. However, having regard to the nature of the current occupiers, car parking and loading vehicle space is important, and it may be that this will need to be reprovided in a multi-storey building to continue to support the existing uses.

Servicing

The Site has an excellent strategic Road network with direct access to the North Circular (A406) via Cabinet Way. However, there is only one access into and out of the which can be a constraint on vehicular movement. Moreover, Cabinet Way has local residential uses which could cause congestion for any HGVs coming from the east.



Figure 115: Servicing – BEA 16

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Given that the Site is within a single freehold ownership and there is substantial surface car parking that does not appear to be well used, there could be an opportunity to deliver additional capacity on this Site. However, given that the uses are big box retail and trade counters that are currently performing and trading well, and the access is poor, it would be challenging to consider this Site for intensification.

Map Key	Freeholder	Size (acres)	Size (ha)
1	Network Rail	0.34	0.13

Table 49: Largest landowners - BEA 17

Source: Nimbus, 2020

Land Registry indicates that there is one freeholder in Joseph Ray Road - Network Rail, as shown Table 49. It should be noted that, although we are aware of the other plots - the freehold ownership is not registered on Land Registry. We are not aware of any recent transactions which inform the boundaries to the other plots on the site, and therefore we would consider this to be unregistered land. As Jewson are located on this Site, we anticipate that they may be a landowner.

Based on the highlighted building in Figure 117 there are no owner-occupiers within the BEA. The Site contains 2 leaseholders. The business activity comprises trade counters, automotive repairs and Royal Mail depot.

BEA 17 – JOSEPH RAY ROAD



Figure 116: Joseph Ray Road - BEA 17

Source: LBWF Employment Land Study, 2015

Location and context

Joseph Ray Road is shown in Figure 116. The Site extends c.1.6 ha and is situated in Leytonstone, less than 100 meters north of Leyton High Road train station. The Site is accessed from the A12 and High Road Leytonstone. Although Joseph Ray Road is relatively small, it is well connected by train and road (within close proximity to A12 and Leyton High Road), and is an attractive factor for potential industrial and other employment occupiers.

Nature and Extent of Landownership



Figure 117: Largest landowners - BEA 17

Source: Nimbus, 2020

Condition of existing stock



Figure 118: Building Age Map - BEA 17

Source: Costar 2020

The properties mainly comprise small, low rise (2-3 storey) warehouses. The properties are smaller structures with low eaves heights. Joseph Ray Road has a number of railway arches that have been converted into industrial units. The Site also contains two buildings (in addition to the railway arches), however the property as well as landowner information is absent from databases, and as such, we cannot accurately confirm the building age, quality or size of stock. Notwithstanding this, from a Google Map's street view it can be said that the two buildings seem fairly modern (possibly built late 1990s or early 2000s). The Site has a large loading space, most likely

3.3 BEA SITES

due to the activity of the tenants (Royal Mail and Jewsons).

Utilisation of land and site



Figure 119: Underutilised land – BEA 17

Source: Avison Young analysis, 2020

The land occupied by Jewson is mainly open storage, which could be rationalised to allow for new development to occur on the site. Similarly, the land outside the arches appears to be fairly underutilised (mainly used for parking) and could be better organised and/or released for new infill industrial development. However, this would need to be considered in line with possible restrictions imposed by the proximity to the railway line. There could be an opportunity to consolidate Jewson and Royal Mail's car parks, to redistribute land for new development.

Uses

The occupiers within the BEA include Jewson (a building material supplier), Royal Mail depot, and a MOT centre. These uses could be co-located with industrial uses, and other employment uses. Co-location with residential uses may be challenging due to the high volume of HGVs and vans associated with Jewson and Royal Mail operations and the imposing railway arches.

Servicing

BEA 17 runs parallel to the A12 and is connected via High Road Leytonstone. This particular section of the A12 can get extremely congested, hampering local connectivity. Moreover, High Road Leytonstone can suffer from heavy congestion during peak hours. The Site is only served by one internal servicing road, and this is unable to support the access and egress of HGVs.



Figure 120: Servicing – BEA 17

Source: Avison Young, 2020

Business/Landowner aspirations

There have been no planning permissions granted on the Site in the last five years.

Utilisation of land and site

BEA 17 presents good opportunity to consider intensification on the basis of underutilisation of land and landowner aspirations. We believe the focus for intensification should be the open yard space at the western extent of the Site. In taking this course of actions, consideration will need to be given to the range of uses suitable for the Site. As aforementioned, employment uses are perhaps most suitable in this location given the nature of existing uses on the Site, and close proximity to the railway line and A12.



Figure 121: Underutilised land – BEA 17

Source: Avison Young analysis, 2020

BEA 18 – HAINAULT ROAD



Figure 122: BEA 18 – Hainault Road

Source: LBWF Employment Land Study, 2015

Location and context

Hainault Road is shown in Figure 122. The Site extends c.1.45 ha and is situated immediately north of Norlington Road north east of Leyton County Cricket Ground and approximately 250 meters miles south east from Leyton Midland Road station. The Site does not have any main roads in its immediate vicinity, but it is accessible via Hainault Road, which leads on to the A112 around 400 meters south from the Site. The Site sits within a highly residential context.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	London Borough of Waltham Forest	4	1.6

Table 50: Largest Landowners – BEA 18

Source: Nimbus, 2020

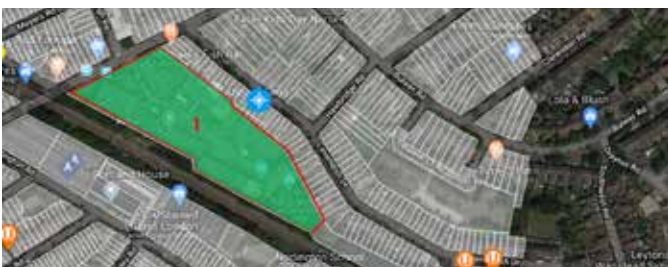


Figure 123: Largest Landowners – BEA 18

Source: Nimbus, 2020

There is only one freehold ownership within BEA 18 – the Site is owned by The London Borough of Waltham Forest.

There are no owner-occupiers within BEA 18. According to Nimbus there are 2 long leaseholders; K B Carpet & Flooring Supplies Ltd (who provide carpet and flooring solutions) and a private leaseholder.

The properties mainly comprise single storey small brick warehouses with metal roofing. The property age is not listed however it looks as if it was built in the 1980s and appear to be in reasonable condition.

Size of properties

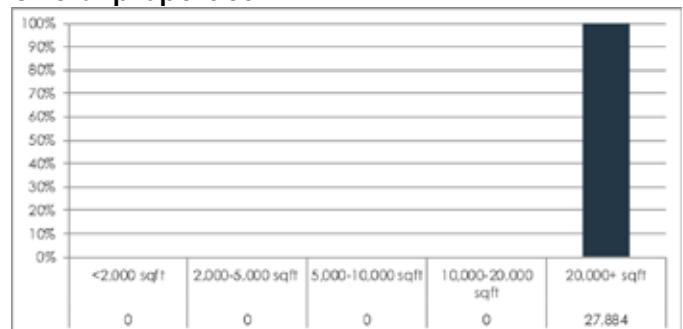


Figure 124: Size of stock (sqft) – BEA 18

Source: Costar, 2020

The industrial estate comprises a shared yard, with subdivided warehouses. The total property floorspace is above 20,000 sqft.

Total sqft	0	0	0	0	27,884
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	0	0	1

Table 51: Size of stock – BEA 18

Source: Costar, 2020

Utilisation of land and site

BEA 18 is fairly intensively used and there does not appear to be underutilised land.



Figure 125: Underutilised land – BEA 18

Source: Avison Young analysis, 2020

3.3 BEA SITES

Uses

There are a wide range of different activities across the Site. This includes a number of automotive repair shops, a custom t-shirt printing company, food and beverage wholesalers (Bearfields and Imperial Fast Food), as well as trade counters (KB Carpet and the Paint place).

Given the nature of the activity predominately focused on wholesale and automotive repairs, co-location with light industrial and other employment uses would be most suitable.

Servicing

There is only one access into the Site via Hainault Road. Hainault Road is shared with residential uses on its north, east, south and west and therefore can be quite congested. Given the size of the internal service road and the configuration, movement for larger vehicles is challenged.



Figure 127: Areas of opportunity for intensification - BEA 18

Source: Avison Young analysis, 2020



Figure 126: Servicing - Hainault Road

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

The Site is within a single freehold ownership and has two long leases layered above. Given that the stock appears to be of 1980s construction – there could be an opportunity to consider this Site for intensification. This would provide an opportunity to reconfigure the plot marginally to create a better shared yard and servicing road, as well as potentially add an additional storey above to increase the capacity.

BEA 19 – HATHERLEY MEWS



Figure 128: Hatherley Mews – BEA 19

Source: LBWF Employment Land Study, 2019

Location and context

Hatherley Mews is shown in Figure 128. The Site extends c.1.7 ha and is situated less than half a mile north of Walthamstow Central station. Road links are less effective with convoluted and busy routes to the A12 and North Circular trunk roads, limiting the BEA’s potential uses to light industry and creative industries.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1, 2 & 3	The Mayor and Burgesses of the London Borough of Waltham Forest	0.56	0.22

Table 52: Largest landowners – BEA 19

Source: Nimbus, 2020



Figure 129: Largest landowners – BEA 19

Source: Nimbus, 2020

Hatherley Mews is split into three main land parcels (land parcels above 0.1 acres). Each of these parcels is in public sector ownership. We are aware that the Council has recently purchased the Tramworks which comprises a two-storey mews, providing 21,000 sqft of studios, offices, a restaurant and 54 homes.

We are not aware of any owner-occupiers within the Site. There are 4 long leaseholders, including Sourdough Pizza Kitchen, Waltham Forest Citizens Advice Bureau, and The Mayor and Burgesses of The London Borough of Waltham Forest.

Condition of existing stock



Figure 130: Building Age Map

Source: Nimbus, 2020

The properties mainly comprise low rise, two storey brick buildings. The stock is dated with build completion dates ranging from 1822 to 1928. However, as demonstrated in Figure 130, data is not available on a significant proportion of the stock on Site. Moreover, whilst dated our desktop survey suggests that a significant proportion has undergone renovation and appears in good condition. In particular, the Tramworks is an example of this.

3.3 BEA SITES

Year Range	Total sqft	Total units
Pre 1900s	14,897	2
1901 - 1950	1,402	2
1951 - 1980	0	0
1981 - 2010	0	0
2010 +	0	0

Table 53: Size and age of stock – BEA 19

Source: Costar, 2020

When reading the above table, it should be noted that only properties with available data on build completion dates are recorded. The total floorspace on Site is 28,690 sqft. Therefore, only 57% of floorspace is accounted for in the above analysis considering build completion dates.

Size of properties

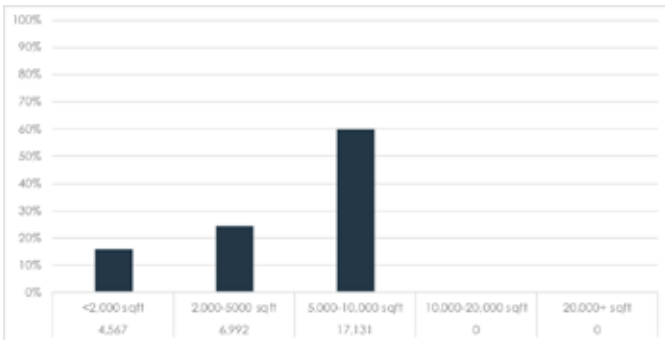


Figure 131: Size of stock (sqft) – BEA 19

Source: Costar, 2020

The majority of stock at Hatherley Mews is small to medium in size, with 60% of all floorspace falling within the 5,000-10,000 sqft category. The largest unit within the BEA is the Tramworks at 10,000 sqft. However, this is subdivided into smaller individual office spaces.

Total sqft	4,567	6,992	17,131	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	7	2	2	1	0

Table 54: Size of stock – BEA 19

Source: Costar, 2020

Utilisation of land and site



Figure 132: Underutilised land – BEA 19

Source: Avison Young analysis, 2020

The employment area is well utilised, and there appears to be no underused space at this point in time.

Uses

There are a number of creative businesses within the employment area, including several recording studios, media companies and technology businesses. Many of these are situated at 10-11 Hatherley Mews, also known as The Tramworks. Tenants include Shoot Media Ltd, Academy Design Ltd and Matt Mars Audio Recording Ltd. The vast majority of these uses are on short leases of 1-5 years.

In terms of opportunities, the creative activity within the BEA may be suitable to co-locate with light industrial/other employment uses, or residential. Notwithstanding this, the constrained nature of space, and well-utilised land on the Site does present a significant barrier.

Servicing

The A112 runs adjacent to the Site and provides reasonable conditions for HGVs to reach the Site. However, connectivity to the North Circular is convoluted and slow. Servicing roads along Hatherley Mews are unable to support HGV movement. Arterial roads, adjoining the A112 and surrounding the Site (Milton Road, Cairo Road, Hatherley Road) are congested due to the presence of residential uses.



Figure 133: Servicing - BEA 19

Source: Avison Young analysis, 2020

Areas of opportunity for intensification

The Site is constrained, which limits opportunities. Moreover, despite old build completion dates, the units on the Site look in good condition, having been recently refurbished. With the vast majority of the Site in council ownership, there is good opportunity here in the medium to longer term. However, at this point in time we do not feel the Site presents an opportunity to deliver additional capacity.

3.3 BEA SITES

BEA 20 – LANCASTER ROAD ARCHES



Figure 134: BEA 20 – Lancaster Road Arches

Source: LBWF Employment Land Study, 2015

Location and context

Lancaster Arches is shown in Figure 134. The Site extends c.0.6 ha and is situated c.100 meters from the Leytonstone High Road Station. It is perpendicular to High Road Leytonstone and it has several residential buildings either side of the Site.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Kind & Co (Holdings) Limited	0.57	0.04
2	London Borough Waltham Forest	0.14	0.05

Table 55: Largest landowners – BEA 20

Source: Nimbus, 2020



Figure 135: Largest landowners – BEA 20

Source: Nimbus, 2020

The land within BEA 20 only has eight land parcels, across four landowners. Our data sources do not list landowner information for all of the land parcels. However, as the units are railway arches, it can be inferred they may be owned by Network Rail.

There is one owner-occupier within the BEA. This is Kind and Company, a commercial real estate firm. According to Nimbus there are seven long leaseholders (meaning leases which are seven years or longer) within the BEA. Out of these seven, six are leased by CDR Nomineco, whilst the remaining one is leased by Kind & Co Limited.

Condition of existing stock



Figure 136: Building Age Map

Source: Costar, 2020

The properties mainly comprise low rise, two storey brick buildings, railway arches and open yards. The age of the stock is quite varied from an 1840 railway arch unit to a 1978 office building. Much of the stock appears to be fairly dated.

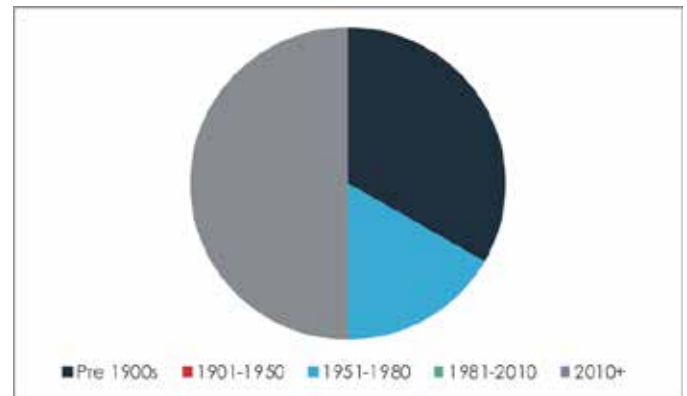


Figure 137: Age of stock – BEA 20

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	1,530	2
1901 - 1950	0	0
1951 - 1980	6,604	1
1981 - 2010	0	0
2010 +	0	0

Table 56: Size and age of stock – BEA 20

Source: Costar, 2020

Size of properties

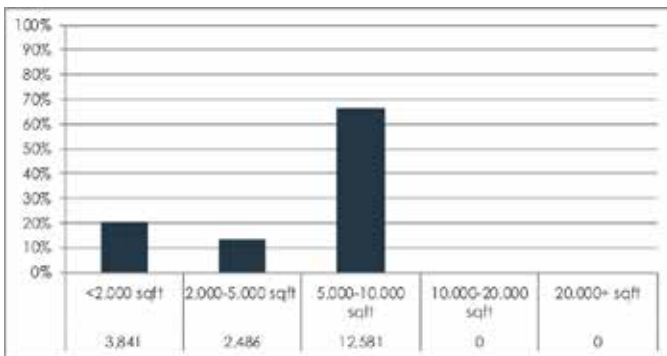


Figure 138: Size and age of stock (sqft) – BEA 20

Source: Costar, 2020

Majority of the listed properties fall within the 2,000-5,000 sqft size range. The smallest property is 765sqft, whilst the largest is 6,604sqft.

Total sqft	3,841	2,486	12,581	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	4	1	2	0	0

Table 57: Size of stock – BEA 20

Source: Costar, 2020

Utilisation of land and site

Across the BEA the land does seem to be intensively used. Considering the current spatial configurations i.e. the railway arches and yards, there is no underutilised land to consider.



Figure 139: Underutilised land – BEA 20

Source: Avison Young analysis, 2020

Uses

There is a diverse mix of occupiers include a building merchant, a commercial real estate company, an engineering firm, and a automotive repair garage. Some of these uses would support co-location with other employment uses; in particular the engineering firm and Commercial real estate company. However, given the proximity to the railway line the conditions for co-location are constraint and poor.

3.3 BEA SITES

Servicing

Lancaster Arches has access to A1006 via High Rd Leytonstone (A1009), but it has limited strategic road network. It has no servicing roads, but is instead accessible via narrow residential roads making access for HGVs extremely challenging.



Figure 140: Servicing – BEA 20

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Given the constraints with the Site, the nature of the uses and ownership pattern, there does not appear to be much scope to consider intensification in this location.

BEA 21 – EAST LONDON OFFICE CENTRE



Figure 141: BEA 21 – East London Office Centre

Source: LBWF Employment Land Study, 2015

Location and context

East London Office Centre is shown in Figure 141. The site extends c.0.08ha and is situated c.100 meters from the Walthamstow Central Underground and train station. East London Office Centre is less than 100 meters from Wood Street station. It adjoins the A112 and sits directly on St Mary Road. It has a row of retail and residential buildings to its west, and has a row of houses on the opposite side of St Mary's Road.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Dellhaven Limited	0.1	0.04

Table 58: Largest landowners – BEA 21

Source: Nimbus, 2020



Figure 142: Largest landowners – BEA 21

Source: Nimbus, 2020

BEA 21 comprises one land parcel and is owned by Dellhaven Limited.

There are no owner-occupiers within the BEA area and we are aware there are no long leaseholders (meaning leases which are seven years or longer) within Site.

Condition of existing stock

The property comprises a building of traditional masonry construction arranged over two floors with serviced office space throughout. Although it was built in 1961, the condition appears fair.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	4,474	1
1981 - 2010	0	0
2010 +	0	0

Table 59: Size and age of stock – BEA 21

Source: CoStar, 2020

Size of properties

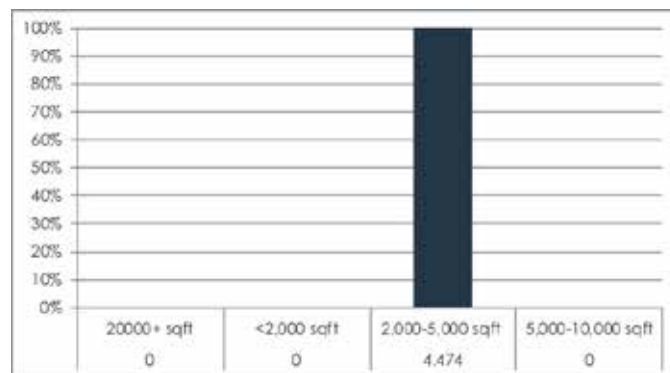


Figure 143: Size and age of stock (sqft – BEA 21)

Source: CoStar, 2020

The building is fairly small and extends 4,474 sqft; it is subdivided and leased to several B1 occupiers.

Total sqft	0	4,474	0	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	1	0	0	0

Table 60: Size of stock – BEA 21

Source: CoStar, 2020

3.3 BEA SITES

Utilisation of land and site

Across BEA 21 the land does seem to be intensively used and there does not appear to be any underutilised land.



Figure 144: Underutilised land – BEA 21

Source: Avison Young analysis, 2020

Uses

As mentioned there are no long leaseholders within the BEA. However there are five short occupiers including Kneisler Music - an independent record label; Exclusive Printers Ltd - a graphic designer; Chelsea Secondary Glazing, who sell window glazing and, Rosmed Ltd who are listed as an alternative medical treatment company.

It is possible to consider co-location with industrial, residential or other employment uses with these activities. However, given the configuration of the property this may not be feasible.

Servicing

The Site is connected to the A112 via Cabinet Way. There is a strong strategic road network with the North Circular situated immediately west of the Site. There are two service roads, one on St Mary's Road and one on Stainforth Road. East London Office Centre has local residential uses surrounding it, but due to nature of uses on the Site this does not represent a major issue.



Figure 145: Servicing – BEA 21

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Due to the density of the Site and existing uses, we do not consider there to be scope for increased capacity.

BEA 22 – BARRETT ROAD

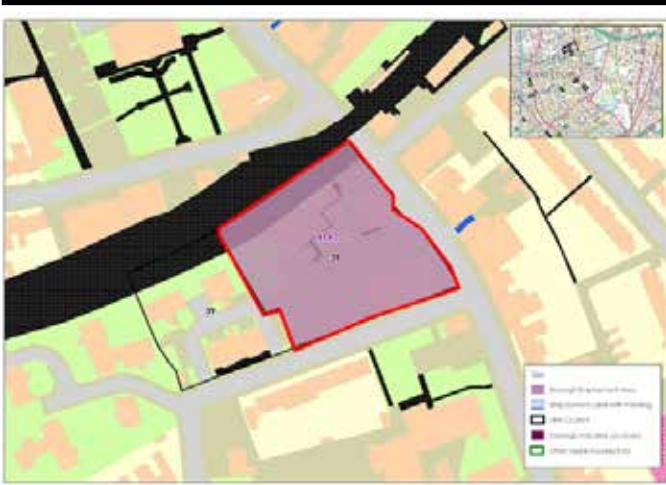


Figure 146: BEA 22 – Barret Road

Source: LBWF Employment Land Study, 2015

Location and context

Barrett Road is shown in Figure 146. The Site extends c.0.8 ha and is situated c.200 meters from the Walthamstow Cricket club. The Site sits directly adjacent to Wood Street Station. It adjoins the B160 and Upper Walthamstow Road. It has two residential estates to its east and west and a primary school to its immediate south, making it unsuitable for heavy industrial occupiers.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Network Rail	1.75	0.7

Table 61: Largest landowners – BEA 22

Source: Nimbus, 2020

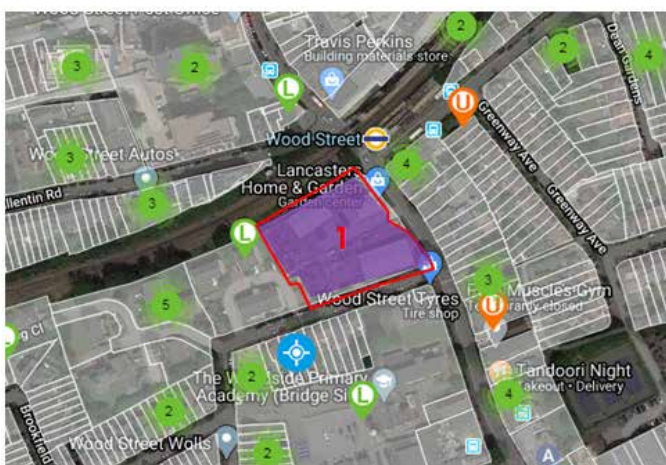


Figure 147: Largest landowners – BEA 22

Source: Nimbus, 2020

The land within BEA 22 is within one ownership; listed on Land Registry as a private owner. Upon further investigation, this appears to be Network Rail. There are no owner-occupiers within the BEA. According to Nimbus there are no long leaseholders (meaning leases which are seven years or longer).

Condition of existing stock

The Site comprises a builder's merchant and yard, two garden centres and an ancillary café. There are three warehouses, ranging from one to three storeys. We are unable to accurately ascertain the stock age, but it appears that the properties most likely were constructed in late 1960s to early 1970s. The stock appears to be in fairly good condition.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	11,000	1
2010 +	0	0

Size of properties

Table 62: Size and age of stock – BEA 22

Source: Costar, 2020

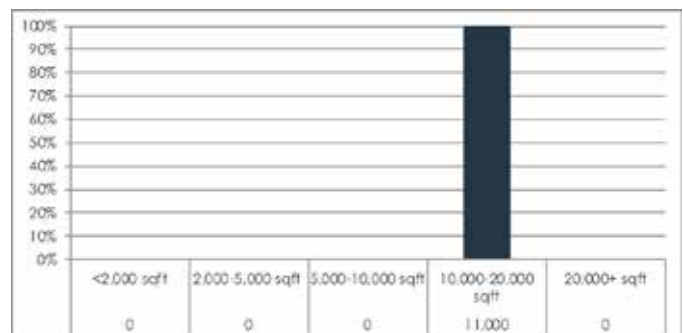


Figure 148: Size and age of stock (sqft) – BEA 22

Source: Costar, 2020

We have been only able to ascertain the size of one warehouse, which extends 11,000 sqft.

Total sqft	0	0	11,000	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	1	0	0

Table 63: Size of stock – BEA 22

Source: Costar, 2020

3.3 BEA SITES

Utilisation of land and site

Across the BEA, the land doesn't appear to be intensively used. There are large swathes of open storage and the properties are not arranged in a linear manner, creating under utilised space to the south of the Site in particular. As a result, there is significant opportunity to consider intensification in this location.



Figure 149: Underutilised land – BEA 22

Source: Avison Young analysis, 2020

Uses

The current occupiers include a Builders' merchant (Thames Roofing and Building Supplies) and garden centre related uses (Lancaster Home and Garden and Garden Machinery and Bottled Gas Co). Given the nature of these activities, the presence of a café and the neighbouring residential uses, it would be feasible to consider co-location with industrial, residential or other employment uses.

Servicing

Barrett Road adjoins Wood Street (B160) immediately to its east. It has a strong strategic road network as the A112 is located close by. There is one internal servicing road within the Site. Barrett Road is surrounded by residential uses which can often lead to the roads becoming congested.



Figure 150: Servicing – BEA 22

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Given that the Site is within one ownership and there is underutilised storage land, there could be an opportunity to deliver a mixed use scheme on this Site. The residential context and proximity to the station mean the Site could accommodate retail/office/leisure space at ground floor with residential above.



Figure 151: Areas of opportunity for Intensification – BEA 22

Source: Avison Young analysis, 2020

ADDITIONAL SITES

There are three sites which form part of the employment offer, and which have been assessed (in terms of their floorspace capacity) in this study but removed for site specific reasons. This includes BEA 3 Auckland Road, BEA 8 Low Hall Depot and BEA 23 E10 Business Centre.

BEA 3 Auckland Road

BEA 3 Auckland Road is situated across the rail tracks from New Spitalfields Market and is accessed via Osier Road to the north and Gateway Road and Auckland Road to the south. Orient Way borders the Site's western extent and is accessible via Gateway Road. The Site sits within a highly residential context to the east with industrial uses and rail infrastructure to the west. The Site extends 5.16 ha, and is within three predominant ownerships, Bywaters Gateway Limited, Thames Water Utilities Ltd and Pocket Living.

The current occupier appears to be largely Bywaters Waste Management Centre. Previous assessments undertaken in the Employment Land Study (2019) have understood this Site to be released for non-employment or mixed-use development and therefore it was considered to not form part of the employment offer in that Study. However, given the current market context this has stalled. Therefore, the Site remains a functioning employment area and at present has not been released.

Bywaters' operations does not provide the most conducive conditions to consider intensification. This is due to the current waste recycling activity on the Site and intensive use of the plot. For this purpose and owing to the ambitions of the Site to be redeveloped at some point by the actors involved, we have omitted this Site as suitable for intensification.

BEA 8 Low Hall Depot

BEA 8 Low Hall Depot is situated adjoining SIL 4 Argall Avenue, to the north. The Site extends 4ha and is within Waltham Forest Council ownership. It can be accessed South Access Road to the north, and Argall Avenue to the south. The current activity is mixed and includes several Council services such as Highways, Parking, Parks, the Dog Team, the Graffiti Team and Grounds Maintenance. Additionally, the

Council's Refuse and Recycling, Street Waste and Trees contractors have bases at the Site. A significant amount of land is currently given over to parking of operational and staff vehicles, and the storage of materials is low density and makes poor use of the land on site.

It is reported that the current layout is inefficient, with little investment over the years to improve the build stock. As a result, the current buildings are of very poor quality and are all nearing or having past their functional life. Given the position of the Site to existing employment areas (i.e. Argall Avenue), the road connectivity and the build stock, this would be the right conditions for industrial intensification. However, as the Site is currently being redeveloped by the Council, who have set the ambitions for the area, we have omitted this Site as suitable to deliver industrial intensification.

BEA 23 E10 Business Centre

BEA 23 E10 Business Centre is located on the junction of Ruckholt Road and High Road Leyton (A12). The Site extends 0.29 hectares. The Site is within a high residential context and is situated along Leyton's High Street. In previous studies, the Site was to be redeveloped for residential. However, this has not been the case and it continues to function as an employment Site. It is understood B class activities are currently present, aligned with professional services sector alongside other uses, such as places of worship.

The Site is a functioning employment area, well occupied and the building within fair condition. Given these factors and the locational context, we have discounted this Site as it would not be appropriate to deliver industrial intensification.

3.4 NON DESIGNATED SITES

LBWF 7 – NORLINGTON ROAD



Figure 152: Norlington Road – LBWF 7
Source: LBWF Employment Land Study, 2015

Location and context

Norlington Road is shown in Figure 152. The Site extends c.1.37 ha and is situated immediately east of Leyton High Road, in the close vicinity of Leyton Midland Road train station and Leytonstone Underground station. The Site is accessible via the A12, the A112 and Norlington Road which enters the Site.

Nature and Extent of Landownership



Figure 153: Largest landowners – LBWF 7
Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
1	Network Rail	0.56	0.22
2	Upper Spring Properties Limited	0.57	0.23

Table 64: Largest landowners – LBWF 7

Source: Nimbus, 2020

Norlington Road is subdivided into 8 land parcels and is within 8 freeholder ownerships; two of which are listed as private owners. The two largest freeholders, shown in Figure 153, account for c.44% of the Site.

We are not aware of any owner-occupiers within the Site. There are 11 long leaseholders, most of which seem to be in 66 Norlington Road. The largest business activity is related automotive repairs and wholesale of fabrics.

Condition of existing stock



Figure 154: Building Age Map – LBWF 7

Source: Nimbus, 2020

The properties mainly comprise low rise, two storey brick buildings. The stock is relatively dated with all units constructed before 1980s.

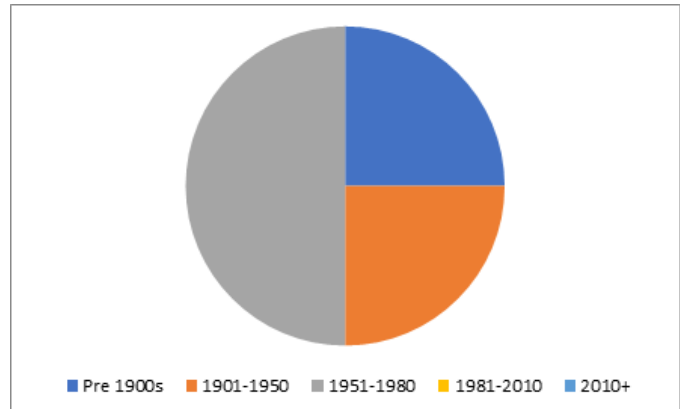


Figure 155: Age of stock – BEA 17

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	31,000	1
1901 - 1950	0	0
1951 - 1980	34,637	2
1981 - 2010	0	0
2010 +	0	0

Table 65: Size and Age of stock - BEA 17

Source: Costar, 2020

Size of properties

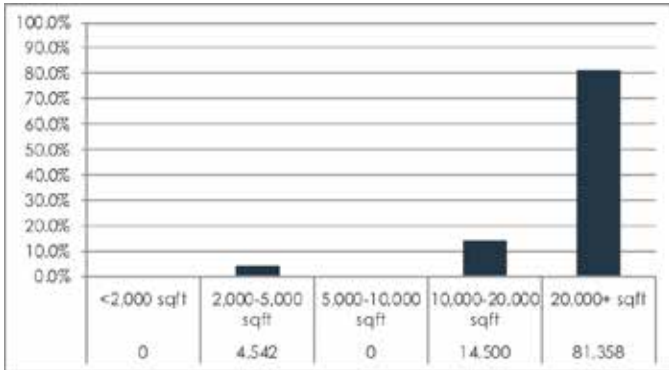


Figure 156: Size of stock (sqft) - BEA 17

Source: Costar, 2020

Most of Norlington road's property floorspace is above 20,000 sqft. The largest property is 66 Norlington Road (31,000 sqft) shortly followed by 72 Norlington Road (c.30,000 sqft) which has been subdivided into smaller units.

Total sqft	0	4,542	0	14,500	81,358
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	1	0	1	3

Table 66: Size of stock - BEA 17

Source: Costar, 2020

Utilisation of land and site



Figure 157: Underutilised land - LBWF 7

Source: Avison Young analysis, 2020

The employment area is well utilised, and there appears to be no underused land at this point in time.

Uses

There are a number of creative businesses within the employment area, including an artists, stained glass and furniture makers at East London Studios (66 Norlington Road). 74 Norlington Road is occupied solely by East London Fabric Warehouse. It is not clear who currently occupies Portland House. To the north of the employment area, the area is occupied by a vehicle repair business (Kichaa Autos).

In terms of co-location the southern creative/wholesaler activity along Norlington Road may be suitable to co-locate with industrial and other employment uses.

Servicing

LBWF 7 has a poor strategic road network. The Site is located some distance from the main distributor network. Moreover, Hainault Road is predominantly residential and can become congested. Internal servicing roads are fairly limited and are not suitable for HGVs. However, it's worth noting that current activity on the Site is not heavily reliant on the strategic road network.



Figure 158: Servicing - LBWF 7

Source: Avison Young analysis, 2020

Source: Avison Young, 2020

Opportunities for Intensification

Given the constrained and well utilised nature of the Site, it is challenging to identify any immediate opportunities for intensification. However, the dated nature of stock may provide some opportunities in the near future. The existing uses would be well placed to consider co-location with a range of employment uses.

3.4 NON DESIGNATED SITES

LBWF9 CROWNLEA



Figure 159: LBWF 9 Crownlea

Source: LBWF Employment Land Study, 2015

Location and context

LBWF 9 is shown in Figure 159. On initial analysis of the Site, the Southern section appears to be operating as residential, and has therefore been excluded from our analysis. This section will refer only to the area in the north depicted by the red line in Figure 159.

The Site extends c.o.82 ha and is situated immediately south of Wood Street station. LBWF 9 is situated within a predominantly residential context but can be considered relatively well connected due to its access via the A104 which leads to the North Circular.

Nature and Extent of Landownership



Figure 160: Largest landowners – LBWF 9

Source: Nimbus, 2020

1	Bilaman Limited	1.1	0.4
2	IPE Wood Street Limited	0.4	0.2
3	Apollo (Wood Street) Limited	0.5	0.2

Table 67: Largest landowners – LBWF 9

Source: Nimbus, 2020

LBWF 9 is divided into six land parcels, and is within three freehold ownerships. There is currently no public ownership on the Site. The largest freeholder is Bilaman Limited.

There are currently two long leaseholders on the Site, found within freehold parcel 1 and 2. Both leases are held by London Power Networks PLC.

Condition of existing stock



Figure 161: Building Age Map – LBWF 9

Source: Costar, 2020

The properties mainly comprise metal-roofed brick units of 2 to 3 storeys. The properties appear fairly dated and in need of modernisation. This is reflected in the build completion dates outlined in Figure 161 and Figure 162.

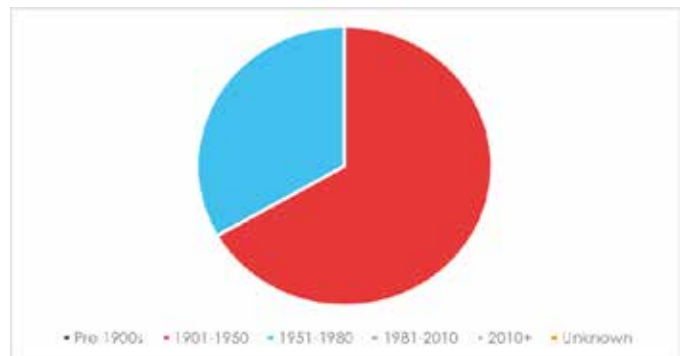


Figure 162: Age of stock – LBWF9

Source: Costar, 2020

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	26,285	2
1951 - 1980	18,199	1
1981 - 2010	0	0
2010 +	0	0

Figure 163: Size and Age of stock – LBWF9

Source: Costar, 2020

Size of properties

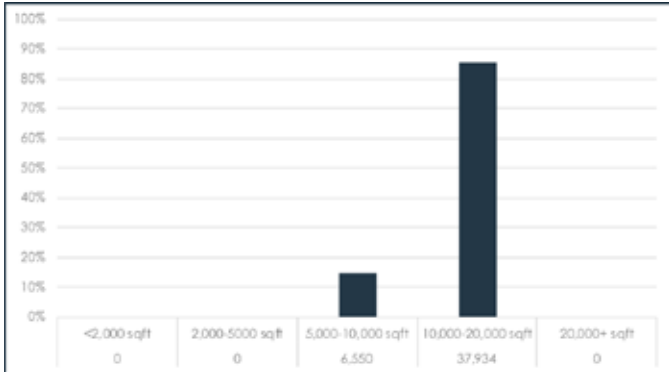


Figure 164: Size and Age of stock (sqft) – LBWF9

Source: Costar, 2020

The properties accounted for on costar are generally medium sized, with all units below 20,000 sqft. However, it's worth noting the diversity in the range of sizes accounting for properties from 6,550sqft to 19,735sqft. The absence of data for a variety of properties should also be taken into account when reviewing the data presented within this section of the report.

Total sqft	0	0	6,550	37,934	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	1	2	0

Figure 165: Size of stock (sqft) – LBWF9

Source: Costar, 2020

Utilisation of land and site



Figure 166: Underutilised land – LBWF9

Source: Avison Young analysis, 2020

The land within LBWF 9 appears fairly intensively used by some heavy industrial uses. Whilst plot ratios appear low, the intensive nature of uses on the Site will likely require significant yard space to carry out their operations effectively. This is clearly demonstrated in Figure 166 in the south and north east of the Site.

Notwithstanding this, there does appear to be a significant strip of underutilised land in the centre of the Site that could be rationalised to create the opportunity to deliver greater industrial capacity.

Uses

There is not a comprehensive list of existing occupiers within the Site due to gaps in the datasets. However, using the data we do have available to us, existing uses include glass repair services (Wood Joinery and Glazing) and fence suppliers (Blok 'N' Mesh) at the western side of the Site, as well as a Plant Hire company (Crown Lea Hire and Sales).

Given the heavy nature of the existing uses and the current operations, there is little scope to consider co-location with other employment uses and residential.

Servicing

The Site has access to the A104 via Wood Street, providing fast links to the North Circular. However, it has a narrow local strategic road network, as well as limited servicing roads which pose challenges to HGV movement. Wood Street can become quite congested given its role as a major through road, and the surrounding residential character of the area.

3.4 NON DESIGNATED SITES



Figure 167: Servicing – LBWF 9

Source: Avison Young, 2020

Areas of opportunity for Intensification.

Land ownership on the Site is condensed and there are a limited number of leases. Moreover, units on the Site are dated, presenting good opportunity for re-provision, potentially in a more efficient format. This could present good opportunity to re-provide in intensified form in the medium term. However, given the scale and nature of the activity with relied on yard space – the opportunity is limited. It is unlikely these uses could be co-located with industrial and or other employment uses and residential.

LBWF 11 – SHAFTESBURY COURT



Figure 168: Shaftesbury Court – LBWF 11
Source: LBWF Employment Land Study, 2019

Location and context

Shaftesbury Court is shown in Figure 168. The c.0.29 ha Site sits immediately north of the Leyton Grange Estate. The Site sits within a residential context, and as such road connectivity is defined by residential streets. The A12 is approximately 1 mile away, and can be reached via Church Road. The nearest public transport connections can be found at Lea Bridge station (c. 1 mile) and (c. 0.5 miles).

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Leyton Point Limited	0.47	0.2

Table 68: Largest Landowners Key – LBWF 11

Source: Nimbus, 2020



Figure 169: Largest Landowners – LBWF 11
Source: Nimbus, 2020

Shaftesbury Court is dominated by one large freeholder, with the remaining three parcels of land under 0.1 acres.

According to Nimbus, there are four long leaseholders. Of these four leases, details are only available on one; Toxteth Real Property & Investment Company Limited. In this instance, the likelihood is that this investor is sub-letting the property on a shorter lease.

Condition of existing stock



Figure 170: Building Age Map – LBWF 11

Source: Nimbus, 2020

The properties comprise of two storey warehouses, configured to suit smaller occupiers. Data is only available on one of the two units on the Site, with a build completion date of 1982.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	9,351	1
2010 +	0	0

Figure 171: Size and age of stock

Source: Costar, 2020

3.4 NON DESIGNATED SITES

Size of properties

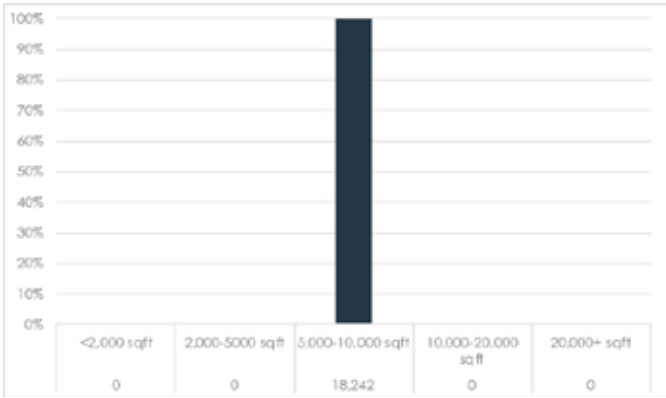


Figure 172: Size of stock (sqft)

Source: Costar, 2020

Both of the units on the site fall within the 5,000 to 10,000sqft category, with floorspace figures of 9,351sqft and 8,891sqft respectively. Both properties have been subdivided into smaller units thus indicating the type of demand within this Site.

Total sqft	0	0	18,242	0	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	2	0	0

Table 69: Size of stock

Source: Costar, 2020

Utilisation of land and site



Figure 173: Underutilised land – BEA 12

Source: Avison Young analysis, 2020

Overall, the land is intensively used and it may be difficult to consider intensification from an underutilisation of land perspective. Existing units are arranged in a conventional linear format and are serviced by a central access road and shared yard space. Existing plot ratios are reasonably high, and aside from multi-storey development on existing floorplates, it's challenging to envisage more intensive use of the land than is currently in operation.

Uses

The current occupiers are varied, with industry type encompassing metal fabrication (Titan Forge), mechanics (Millenium Autos), home furniture (Kawasaki Furniture), and Electronics (Capella Electronics).

Given the nature of uses, there could be potential to co-locate industrial and other employment uses with the existing businesses on Site. However, given the constrained supply of land within the Site, there are clearly practical challenges to intensification in this location.

Servicing

The Site has immediate access to Church Road (A1006), but poor connectivity to the main distributor network (North Circular, A12). Access and egress for HGVs is challenging within the Site and in the immediate road network around it. Roadside parking and speed bumps on Park Road present a particular challenge to HGVs when accessing the Site. Surrounding roads, including Park Road, and Church Road, can become quite congested; shared with residential uses.



Figure 174: Servicing – LBWF 11

Source: Avison Young analysis, 2020

Opportunities for Intensification

Given the constrained, and well utilised nature of the Site, there are not deemed to be any immediate opportunities for intensification.

LBWF 22 – RAVENSWOOD INDUSTRIAL ESTATE



Figure 175: Ravenswood Industrial Estate - LBWF 22

Source: LBWF Employment Land Study, 2015

Location and context

Ravenswood Industrial Estate is shown in Figure 175. The Site extends c.0.47 ha. The Site is north-west of Whipps Cross and south-west of Upper Walthamstow. Ravenswood Industrial Estate is situated west of the B160, and adjoins Shernhall Street. Walthamstow Central is its closest train and underground station, which is 0.5 miles west from the Site.

Nature and Extent of Landownership



Figure 176: Largest landowners - LBWF 22

Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
I	City Properties Limited	1.74	0.47

Table 70: Largest landowners Key - LBWF 22

Source: Nimbus, 2020

There is only one freeholder in Ravenswood Industrial Estate; City Properties Limited.

According to Nimbus, there are two long leaseholders (meaning leases which are seven years or longer). The largest business activity (by number of leases) is the manufacture and production of beverages which includes breweries, bars, cafes and roasteries.

Condition of existing stock



Figure 177: Building Age Map - LBWF 22

Source: Nimbus, 2020

The properties mainly comprise of single storey warehouses, configured to suit smaller occupiers. The stock within the site is quite dated, with completion dates ranging from the late 1950s to early 1960s.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	14,963	3
1981 - 2010	0	0
2010 +	0	0

Table 71: Size and age of stock

Source: Costar, 2020

3.4 NON DESIGNATED SITES

Size of properties

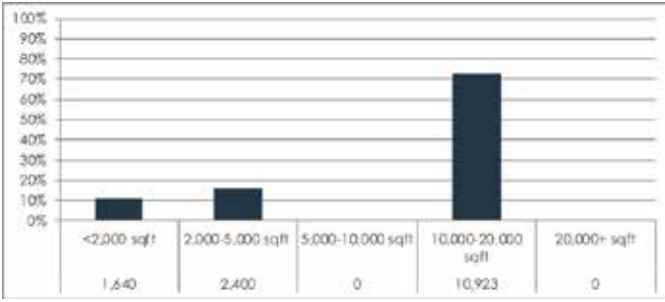


Figure 178: Size of stock (sqft)

Source: Costar, 2020

Over 70% of the property floorspace falls within the 10,000-20,000 sqft range, specifically being just under 11,000 sqft. The majority of the properties have been subdivided into smaller units, thus indicating the type of demand within this Site.

Total sqft	1,640	2,400	0	10,923	0
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	1	1	0	1	0

Table 72: Size of stock

Source: Costar, 2020

Utilisation of land and site



Figure 179: Underutilised land – LBWF 22

Source: Avison Young analysis, 2020

The employment area is relatively small but there appears to be a pocket of land, currently used as surface parking, which could be rationalised to create the opportunity for more industrial development. This would have to be considered against the ability to allow for HGVs movement into the employment area.

Uses

The current occupiers include an MOT garage to the north and a number of breweries within the warehouses. There could be potential to co-locate industrial and other employment uses with the breweries. However, the potential for intensification is limited due to the location and residential character of the site.

Servicing

LBWF 22 has a poor strategic road network, with the Site situated some distance from the North Circular. Shernhall Street is residential in nature, and as a result, does become fairly congested. Notwithstanding this, the Site does benefit from good local connectivity given its close proximity to Walthamstow. Internal servicing is poor, with one road in and out of the Site. Consequently, the Site is not deemed suitable for HGVs.



Figure 180: Servicing – LBWF 22

Source: Avison Young analysis, 2020

Opportunities for Intensification

The consolidated nature of land ownership, and poor condition of existing stock presents opportunity for intensification in this location. However given the current uses and activities (which do rely on the surface parking), as well as the poor strategic road network it may be challenging to consider intensification in this location.

LBWF 36 – SKELTONS LANE



Figure 181: LBWF 36

Source: LBWF Employment Land Study, 2015

Location and context

Skeltons Lane is shown in Figure 181. The site extends c.1.08 ha and is situated north east of Leyton Country Cricket Ground, approximately 100 meters north west from Leyton Midland train station. The Site does not have any nearby major roads but is accessible via High Road Leyton to its immediate east.

Nature and Extent of Landownership

Map Key	Freeholder	Size (acres)	Size (ha)
1	Royal mail group Limited	0.65	0.26
2	Pall Mall 3 Limited	0.48	0.19

Table 73: Largest Landowners – LBWF 36

Source: Nimbus, 2020

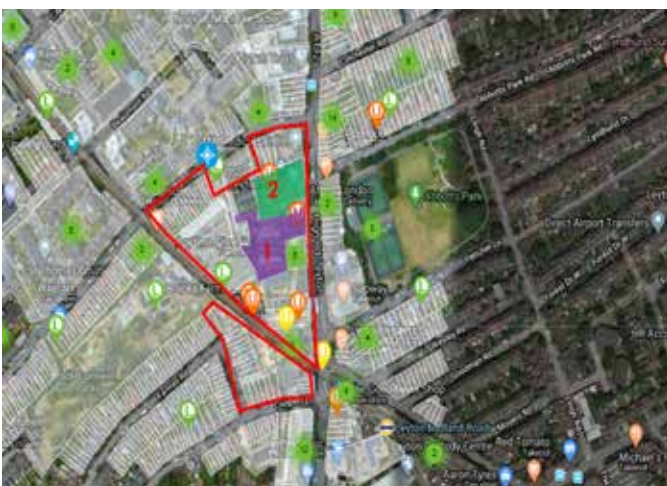


Figure 182: Largest Landowners – LBWF 36

Source: Nimbus, 2020

The land within LBWF 36 is divided into 11 land parcels, and is held within 11 freehold ownerships. The two largest freeholders account for 41% of the site.

There are two owner-occupiers within the BEA, Royal Mail and Independent Vetcare. According to Nimbus there are 9 long leaseholders (meaning leases which are seven years or longer). Within LBWF 36, there are a wide range of business activities, but predominantly (by number of leases) businesses are retailers.

Condition of existing stock

The properties mainly comprise of single storey brick buildings. They are generally of reasonable quality but present fairly dated build completion dates. The units are mainly purpose built two storey shop front retail, with some three storey metal warehouse buildings. Majority of LBWF 36's stock is built between the 1950s and 1970s.



Figure 183: Building Age Map – LBWF 36

Source: Costar, 2020

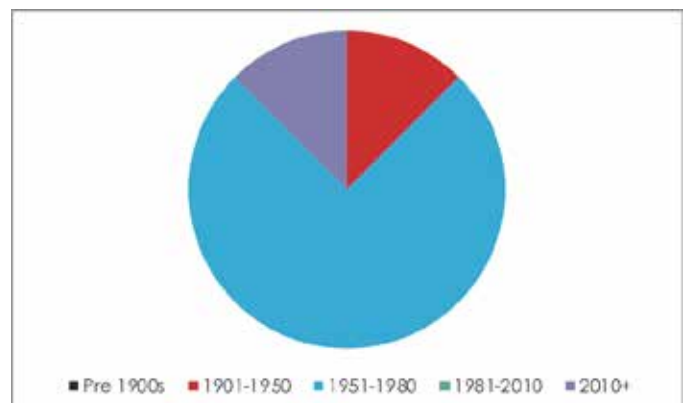


Figure 184: Age of Stock – LBWF 36

Source: Avison Young, 2020

3.4 NON DESIGNATED SITES

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	730	1
1951 - 1980	50,315	6
1981 - 2010	0	0
2010 +	3,972	1

Table 74: Size and Age of Stock – LBWF 36

Source: Costar, 2020

Size of properties

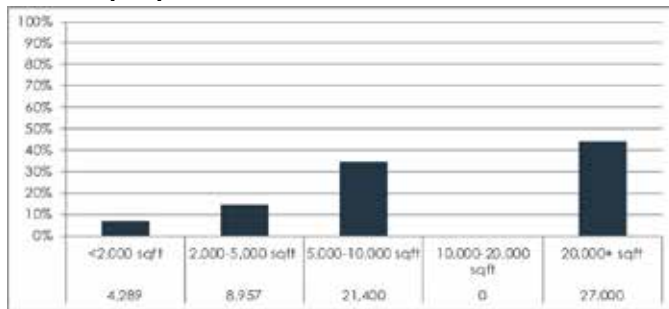


Figure 185: Size and Age of Stock (sqft) – LBWF 36

Source: Costar, 2020

A significant proportion of the property floorspace falls above the 20,000 sqft range (44%), however, there is a good spread of sizes with around 35% of the properties between the 5,000-10,000 sqft range, and 22% smaller than this (largely due to the high number of retail units).

Total sqft	4,289	8,957	21,400	0	27,000
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	5	2	3	0	1

Table 75: Size of stock – LBWF 36

Source: Costar, 2020

Utilisation of land and site

Across LBWF 36 the land is intensively used. There are no spaces which can be further intensified unless multi-storey developments are considered.



Figure 186: Underutilised land – LBWF 36

Source: Avison Young analysis, 2020

Uses

There are a number of occupiers within the LBWF 36 site such as Royal Mail (logistics), Independent Vetcare Ltd (veterinary), Paddy Power (Betting shop), Anytime Fitness (Gym), and SupremeVehicles (MOT centre).

The mix of activities and their operations imply that there are opportunities to consider co-location. As the occupiers are predominately retail or light industrial uses, LBWF 36 may be suitable to co-locate with other light industrial uses such as creative workspaces, warehouses and could be suitable for residential uses. Nonetheless the land is extremely intensively used, and thus any additional users would likely be added in a multi-storey development.

Servicing

The Site has good access to the A112 on its eastern extent. Within the Site there are good internal servicing roads, although the Site is cut in half by the railway line, presenting challenges to egress. There appears to be relatively constrained HGV access on Skelton Lane (north of Site).



Figure 187: Servicing – LBWF 36

Source: Avison Young analysis, 2020

Areas of opportunity for Intensification

Given the current configuration of the Site and the fragmented ownership, we do not think there is opportunity to intensify the Site.

3.4 NON DESIGNATED SITES

CORK TREE RETAIL PARK



Figure 188: Cork Tree Retail Park

Source: Costar, 2020 (based of LBWF Boundary Map data, 2019)

Location and context

Cork Tree Retail Estate is shown in Figure 188. The Site extends c.2.2 ha and is situated immediately south of Hall Lane and immediately north of North Circular. Cork Tree Retail Park is north of the A406 and south west of the A1009, with Meridian Water train station 0.8 miles west from the Site. The Site is positioned along the North Circular, which is attractive to industrial occupiers.

Nature and Extent of Landownership



Figure 189: Largest Landowners

Source: Nimbus, 2020

Map Key	Freeholder	Size (acres)	Size (ha)
I	M & G Real Estate	5.8	2.3

Table 76: Largest Landowners – Cork Tree Retail Estate

Source: Costar & Nimbus, 2020

The land within Cork Tree Retail Park is held within a single freehold ownership. Cork Tree Retail Park is owned solely by M & G Real Estate. However, Nimbus states that there are two different co-owners (British Overseas Bank Nominees Ltd & WGTC Nominees Ltd). The data differences are most likely due to a recent sale not yet updated on Nimbus.

There are no owner-occupiers within the Cork Tree Retail Park. According to Nimbus there are nine long leaseholders. Within the area there are a wide range of business activities, but predominantly businesses are associated within the big box retailers e.g. Halfords and Decathlon.

Condition of existing stock



Figure 190: Building Age Map – Cork Tree Retail Estate

Source: Costar, 2020

The property within the retail park comprises a single storey warehouse structure of steel frame construction. It has high ceiling heights and car parking for shoppers as well as for loading vehicle access. The warehouse is subdivided to allow for self-contained retail units to meet big box retail tenant requirements. Cork Tree Retail Park is within relatively good condition having been completed in 2001 and recently refurbished.

Year Range	Total sqft	Total units
Pre 1900s	0	0
1901 - 1950	0	0
1951 - 1980	0	0
1981 - 2010	96,051	1
2010 +	0	0

Table 77: Size and age of stock – Cork Tree Retail Estate

Source: Costar, 2020

Size of properties

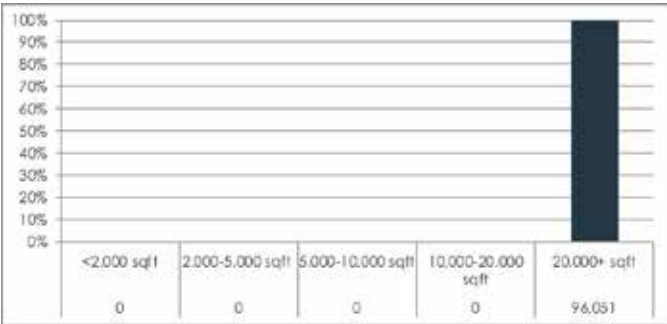


Figure 191: Size of stock (sqft) – Cork Tree Retail Estate

Source: Costar, 2020

All of the property floorspace is over the 20,000+ sqft range – reflecting its relative large size. As mentioned previously, the warehouse has been subdivided to allow for a range of retailers to occupy the property.

Total sqft	0	0	0	0	96,051
Range	<2,000 sqft	2,000-5,000 sqft	5,000-10,000 sqft	10,000-20,000 sqft	20,000+ sqft
Units	0	0	0	0	0

Table 78: Size of stock – Cork Tree Retail Estate

Source: Costar, 2020

Utilisation of land and site

Across the Cork Tree Retail Estate, the land does not appear intensively used, with much of the land taken up by car parking for the retail units, as well as a small portion for vehicle servicing behind the retail units. However, this parking and servicing area is likely essential for the continued operations of the retailers.



Figure 192: Underutilised land – Cork Tree Retail Estate

Source: Avison Young analysis, 2020

Uses

There are a number of occupiers within the Cork Tree Retail Park including Halfords, Sports Direct and Currys PC World. Interestingly all of the tenants at Cork Tree Retail Estate fall under A1 use class. As all of the uses are retail, their activity implies that there could be opportunities to consider co-location. However, this would need to be balanced against the requirement for parking and servicing of the retailers currently on the Site.

3.4 NON DESIGNATED SITES

Servicing

Cork Tree Retail Park is depicted by the dotted white line in Figure 193. The Site has access to the North Circular via Hall Lane (A1009). The Site is surrounded by an effective strategic road network, but presents slight access challenges via the secondary access road. Moreover, several of the servicing roads appear unable to support HGV movement. Hall lane can become quite congested due to the residential uses to the north and east of the Site.



Figure 193: Servicing Cork Tree Retail Estate

Source: Avison Young, 2020

Opportunities for Intensification

There are not deemed to be any opportunities for intensification within the Site if considered insolation. However, as aforementioned, there could be some opportunity to include this Site alongside the intensification of the adjoining Site, SIL 1.

3.5 SUMMARY

The outcome of the site by site analysis identifies that there are a number of employment sites which may be suitable to consider for industrial intensification. To summarise the conclusions of the criteria-based assessment, please see the summary matrix below. This provides a high level, visual and spatial representation of the outcome of the analysis.

In terms of colour rating, generally the higher the score the more supportive the conditions to enabling industrial intensification on the site.

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
SIL1	Hall lane					
SIL2	North Circular					
SIL3	Blackhorse Lane					
BEA 1	Howard Road					
BEA 2	Sherrin Road					
BEA 5	Etloe/ Simmonds Road					
BEA 6	Church Road					
BEA 7	Heybridge Way					
BEA 9	Suntherland Road					
BEA 10	Clifford Road					
BEA 11	Waltham Park Way					
BEA 12	Justin Road/ Trinity Way					
BEA 13	Highams Park					
BEA 14	Montague Road					
BEA 15	Temple Mills Lane					
BEA 16	Cabinet Way					
BEA 17	Joseph Ray Road					
BEA 18	Hainault Road					
BEA 19	Hatherley Mews					
BEA 20	Lancaster Road Arches					
BEA 21	East London Office Centre					
BEA 22	Barrett Road					
LBWF 7	Norlington Road					
LBWF 9	Crownlea					
LBWF 11	Shaftesbury Court					
LBWF 20	Ravenswood Industrial Estate					
LBWF 36	Skeltons Lane					
-	CTRE					

From the criteria-based assessment, it is clear there is opportunity for large scale industrial intensification on all of the SIL sites (SIL_{1,2,3}), BEA₂ and Cork Tree Retail Park. As a general overview, these sites present the most supportive conditions to be considered for industrial intensification due to their relatively large size, the proximity to the North Circular, and the ownership structure. Alongside this, we have also identified a number of smaller sites which also present supportive conditions for to deliver other employment uses alongside new industrial floorspace; BEA_{1, 6, 12, 13, 17, 18, 22}.

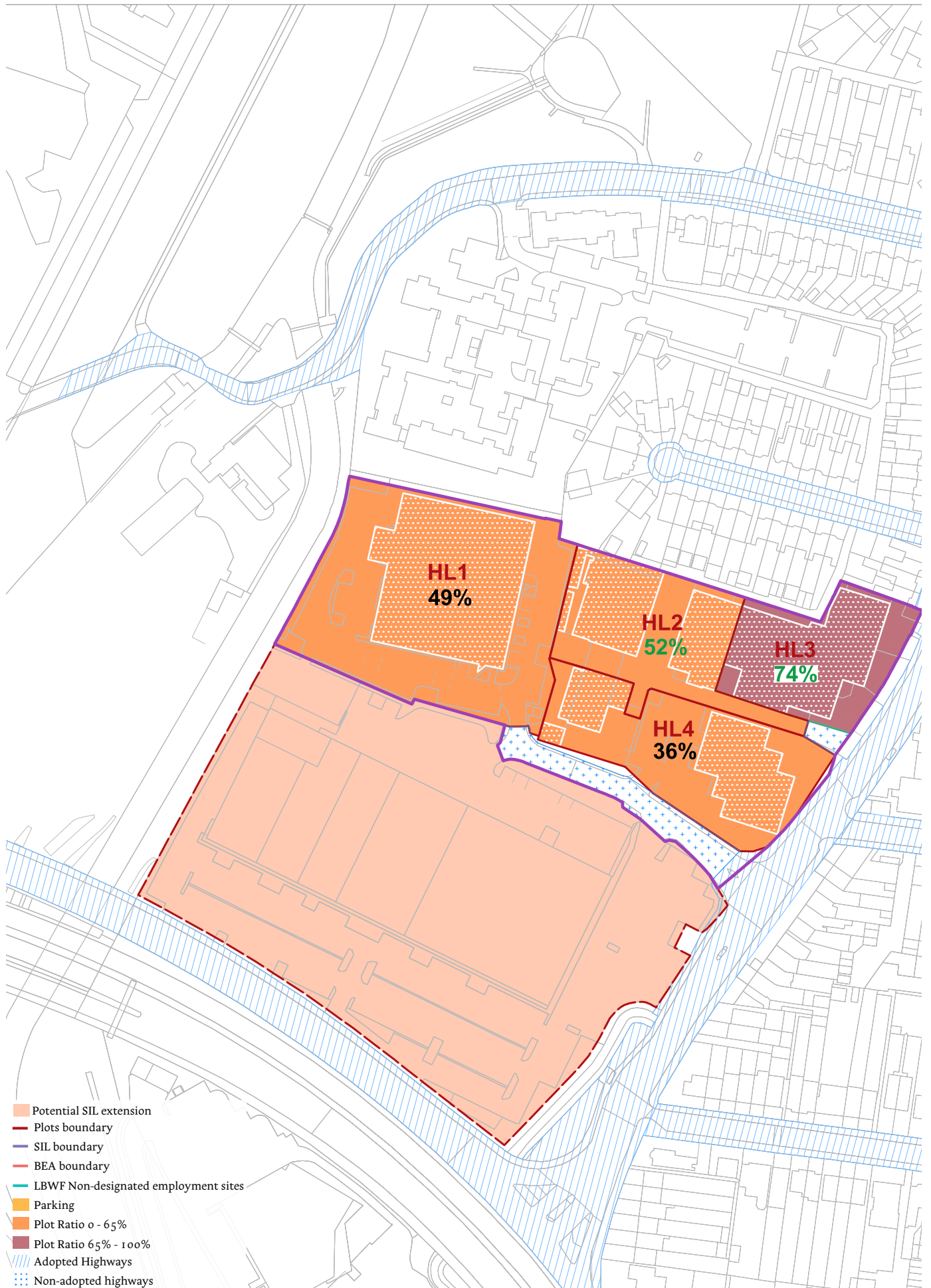
We have summarised the uplift for these sites in the following tables and diagrams.

Criteria	Rating: Not Supportive (1)	Rating: Moderately Supportive (2)	Rating: Most supportive (3)
Nature and Extent of Landownership	Highly fragmented landownership structure. Significant number of leasehold ownerships layered above.	Some areas of consolidated landownership, with a small number of long leasehold ownership.	Mostly, consolidated landownership.
Condition of existing stock	Modern stock, recently refurbished/developed.	Some modern stock, with pockets of more dilapidated/dated stock within the employment area.	Dated and/or dilapidated stock, appearing to be in need of redevelopment.
Utilisation of land and site	Limited/no areas of underutilised land.	Some small areas of underutilised land.	Large swathes of underutilised land arranged as open forecourt, brownfield Land or car parking etc.
Uses	Predominantly comprises business activity which does not lend itself to be able to co-locate with industrial, other employment uses or residential. Evidence of heavy industrial uses that are not suitable for co-location.	Some business activity which could be considered suitable for co-location with industrial, other employment uses or residential. Some evidence of heavy industrial uses which are not suitable for co-location.	Predominantly comprises business activity which could be considered suitable for co-location with industrial, other employment uses or residential.
Services	Poor strategic and local road networks. Poor internal service roads that will not support increased vehicle traffic, including HGVs and LGVs. High congestion on secondary roads.	Moderately good strategic and local road networks. Good internal servicing roads that could support an increased in vehicle traffic, including HGVs and LGVs. Moderate congestion on secondary roads.	Excellent strategic and local road networks that would support intensification. Excellent internal servicing roads that appear to have the capacity to accommodate greater vehicular traffic, including HGVs and LGVs. Limited/no congestion on secondary roads.

3.6 SIL SITES - PLOT RATIO AND UPLIFT






SIL 1 HALL LANE

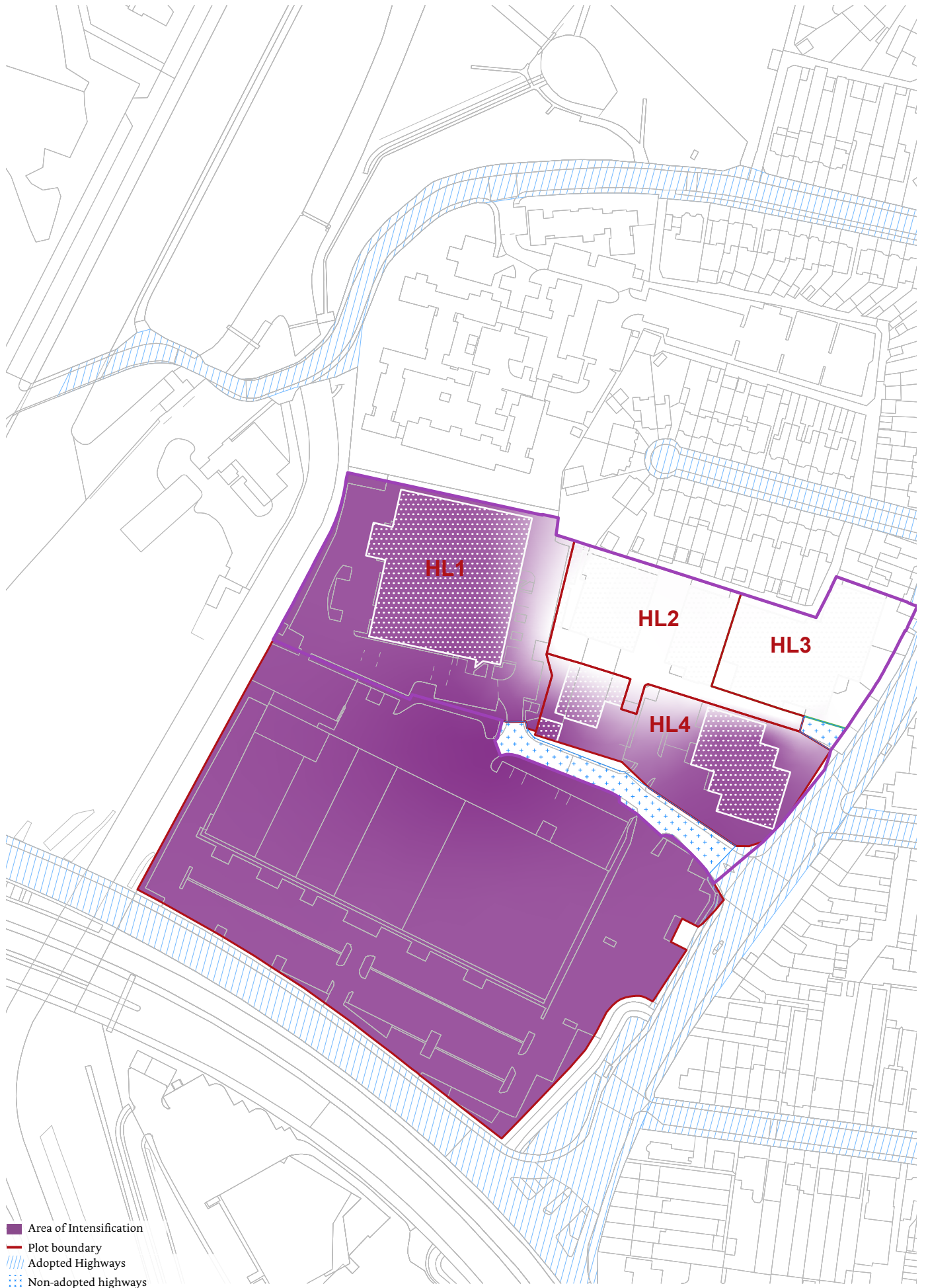
Plot_ID		HL1	HL2	HL3	HL4	Grand Total
Plot Area		7,290	3,149	2,732	3,932	17,103
Footprint		3,026	1,642	1,897	1,545	8,110
Plot Coverage %		42%	52%	69%	39%	
VOA Data	Total Properties	3	6	2	1	12
	Sum of Basement	-	-	-	-	
	Ground Floor	2,768	1,115	1,413	1,389	6,685
	First Floor	662	-	100	-	762
	Second Floor	-	-	-	-	
	Mezzanine	35	160	93	52	340
	Operational business space	-	-	-	-	
	Yard	-	-	-	-	
	Car Parks	1,210	104	161	-	1,475
	Total Area	4,675	1,379	1,767	1,441	9,262
	Floorspace	3,430	1,115	1,513	1,389	7,447
OS Mapping Measurement			1,642	2,022		
Costar Data			502	-		
Egi Data			-	810		
Plot Ratio %		49%	54%	76%	36%	
TOTAL Built Floorspace		3,430	1,642	2,022	1,389	8,483
TOTAL Area		4,675	1,642	2,022	1,441	8,483



3.6 SIL SITES - PLOT RATIO AND UPLIFT

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
SIL1	Hall lane					

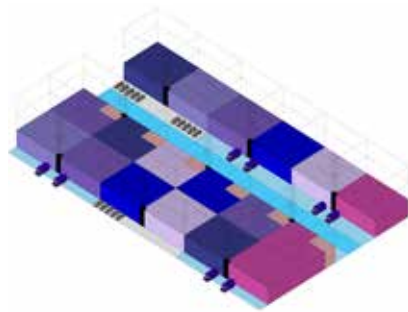
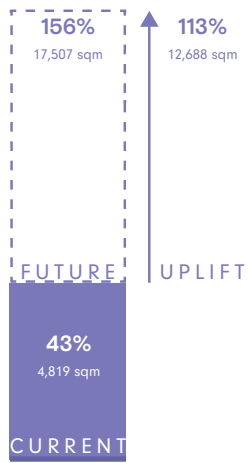


3.6 SIL SITES – PLOT RATIO AND UPLIFT

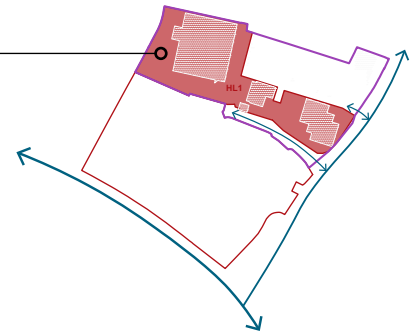
Potential intensification

SIL 1 OPTIONS		1	2			
		SIL development	SIL+ Include Cork Tree Retail Park			
Current Condition	Plot IDs	HL1+HL4	HL1 +	CTRP +	HL4	
	Plot Area	11,223	7,290	22,262	3,932	11,223
	Plot Ratio	43%	47%		35%	43%
	Built Floorspace	4,819	3,430		1,389	4,819
Potential Uplift	Typology	B	D	D	B	
	Potential Plot Ratio	156%	165%	165%	156%	
	Future Built Floorspace	17,507	12,029	36,732	6,134	54,895
	Built Floorspace Uplift sqm	12,688	8,599	36,732	4,745	50,076
	Potential Increase in Plot Ratio	113%	118%	165%	121%	135%

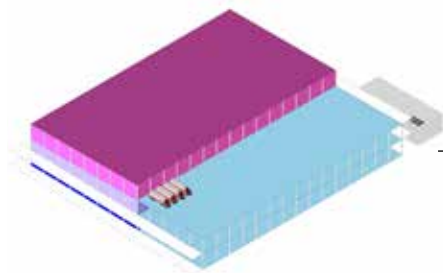
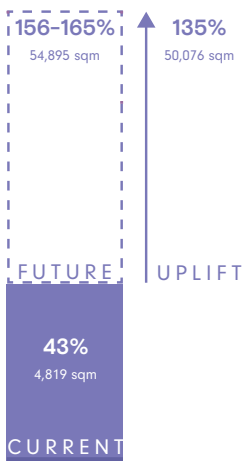
Scenario 1: SIL redevelopment



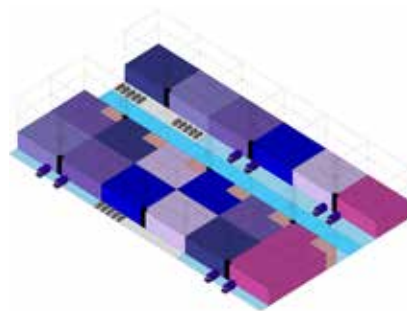
Typology B: Shared Yard
 • Plot Ratio: 156%



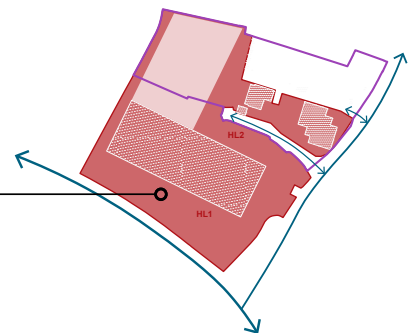
Scenario 2: SIL & Retail Park redevelopment



Typology D: Multi-storey Industrial 3 Storey
 • Plot Ratio: 165%



Typology B: Shared Yard
 • Plot Ratio: 156%



- Area of Intensification
- Access
- Plots boundary

3.6 SIL SITES - PLOT RATIO AND UPLIFT

SIL 2 NORTH CIRCULAR






Plot_ID		NC1	NC2	NC3	Grand Total
Plot Area		8,164	3,509	28,024	39,697
Footprint		1,575	1,562	12,392	15,530
Plot Coverage %		19%	45%	44%	
VOA Data	Total Properties	1	1	1	3
	Sum of Basement	-	-	-	-
	Ground Floor	1,831	2,035	11,933	15,799
	First Floor	399	2,035	68	2,502
	Second Floor	-	2,035	-	2,035
	Mezzanine	-	-	-	-
	Operational business space	1,950	-	14,400	16,350
	Yard	-	82	-	82
	Car Parks	265	81	-	346
	Total Area	4,444	6,267	26,402	37,113
	Floorspace	2,229	6,105	12,002	20,335
OS Mapping Measurement					
Costar Data					
Egi Data					
Plot Ratio %		28%	179%	44%	
TOTAL Built Floorspace		2,229	6,105	12,002	20,335
TOTAL Area		4,444	6,267	26,402	37,113



- Potential SIL extension
- Plots boundary
- SIL boundary
- BEA boundary
- LBWF Non-designated employment sites
- Parking
- Plot Ratio 0 - 65%
- Plot Ratio 65% - 100%
- Adopted Highways
- Non-adopted highways

3.6 SIL SITES - PLOT RATIO AND UPLIFT

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
SIL2	North Circular					

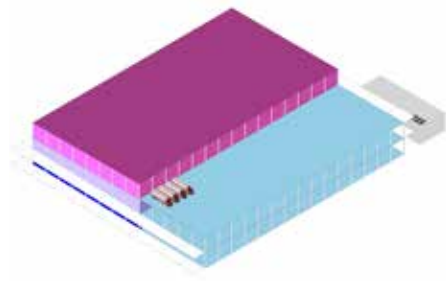
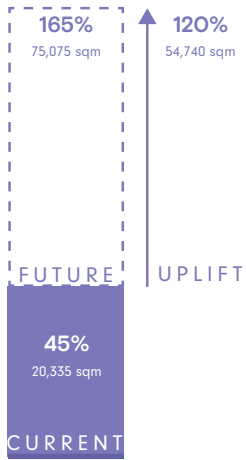


3.6 SIL SITES – PLOT RATIO AND UPLIFT

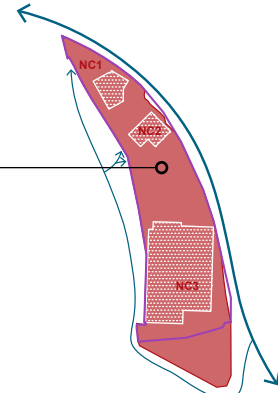
Potential intensification

SIL 2 OPTIONS		1	2	3
		SIL development + Parking Site	Attached structure + Parking Site	Infill Development + Parking Site
Current Condition	Plot IDs	All plots + Parking	All plots + Parking	NC1 + NC2 + Parking
	Plot Area	45,500	45,500	41,991
	Plot Ratio	45%	45%	34%
	Built Floorspace	20,335	20,335	14,231
Potential Uplift	Typology	D	C	A
	Potential Plot Ratio	165%	110%	200%
	Future Built Floorspace	75,075	50,050	83,982
	Built Floorspace Uplift sqm	54,740	29,715	69,751
	Potential Increase in Plot Ratio	120%	65%	166%

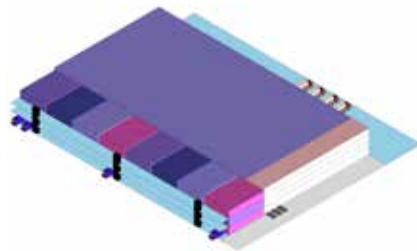
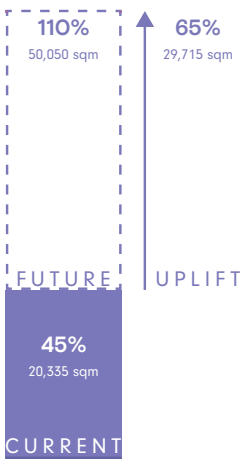
Scenario 1: Whole SIL redevelopment



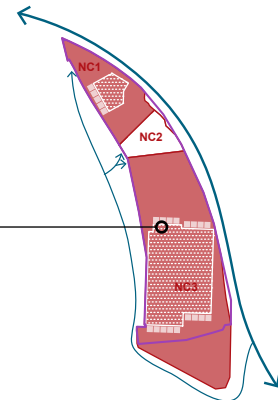
Typology D: Multi-storey Industrial 3 Storey
 • Plot Ratio: 165%



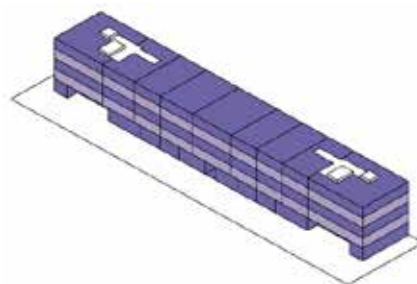
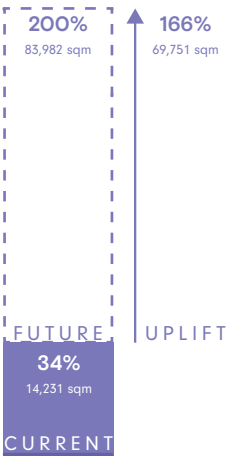
Scenario 2: Partial SIL redevelopment/Retaining Existing Bix Box



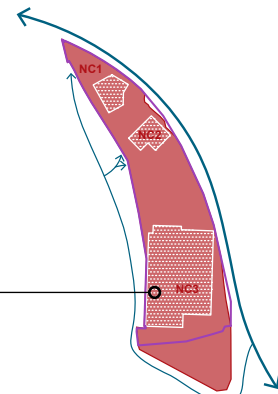
Typology C: Attached Structure
 • Plot Ratio: 110%



Scenario 3: Under-performing sites development



Typology A: Industrial Building
 • Plot Ratio: 200%

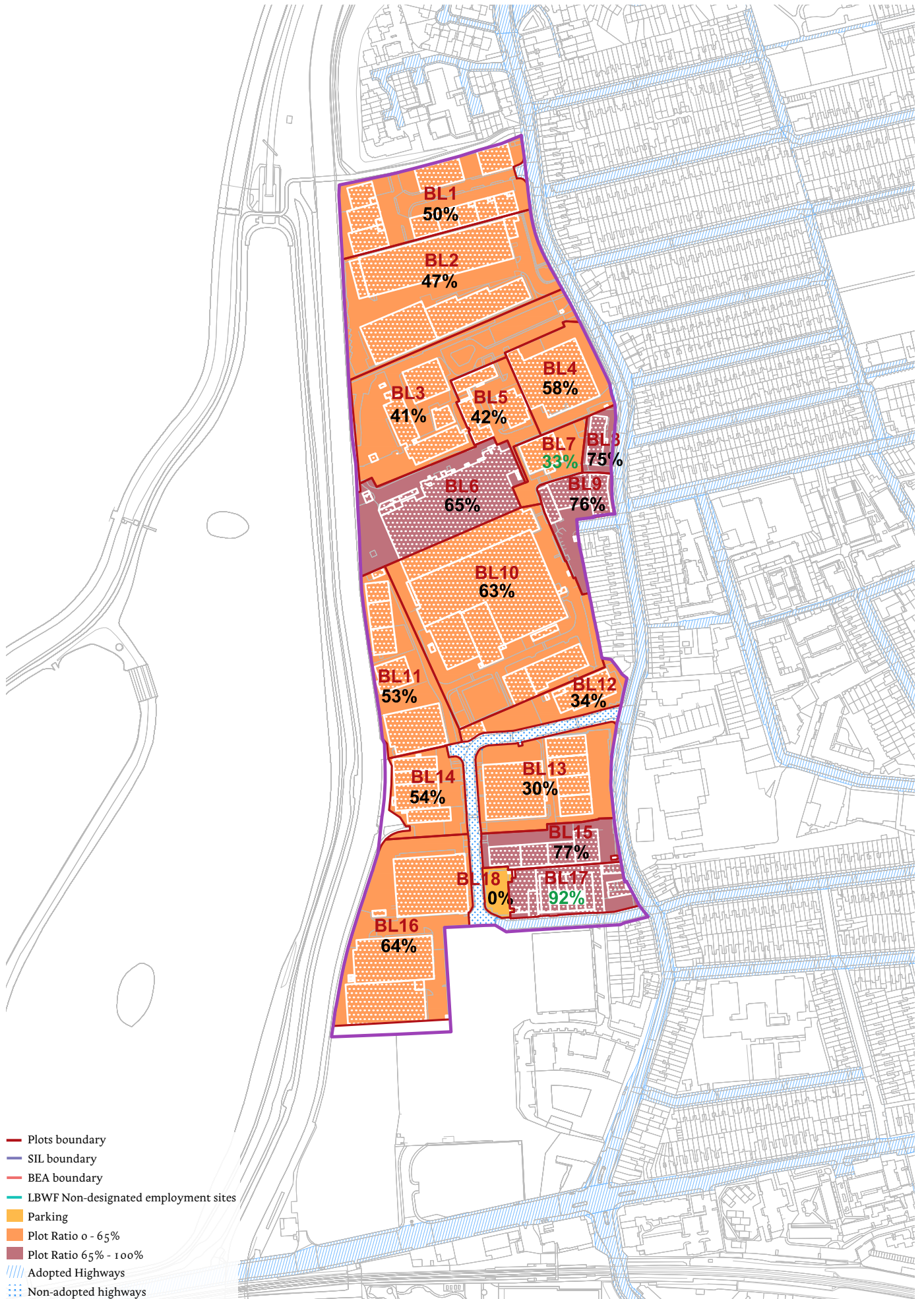


- Area of Intensification
- Access
- Plots boundary

3.6 SIL SITES - PLOT RATIO AND UPLIFT

SIL 3 BLACKHORSE LANE

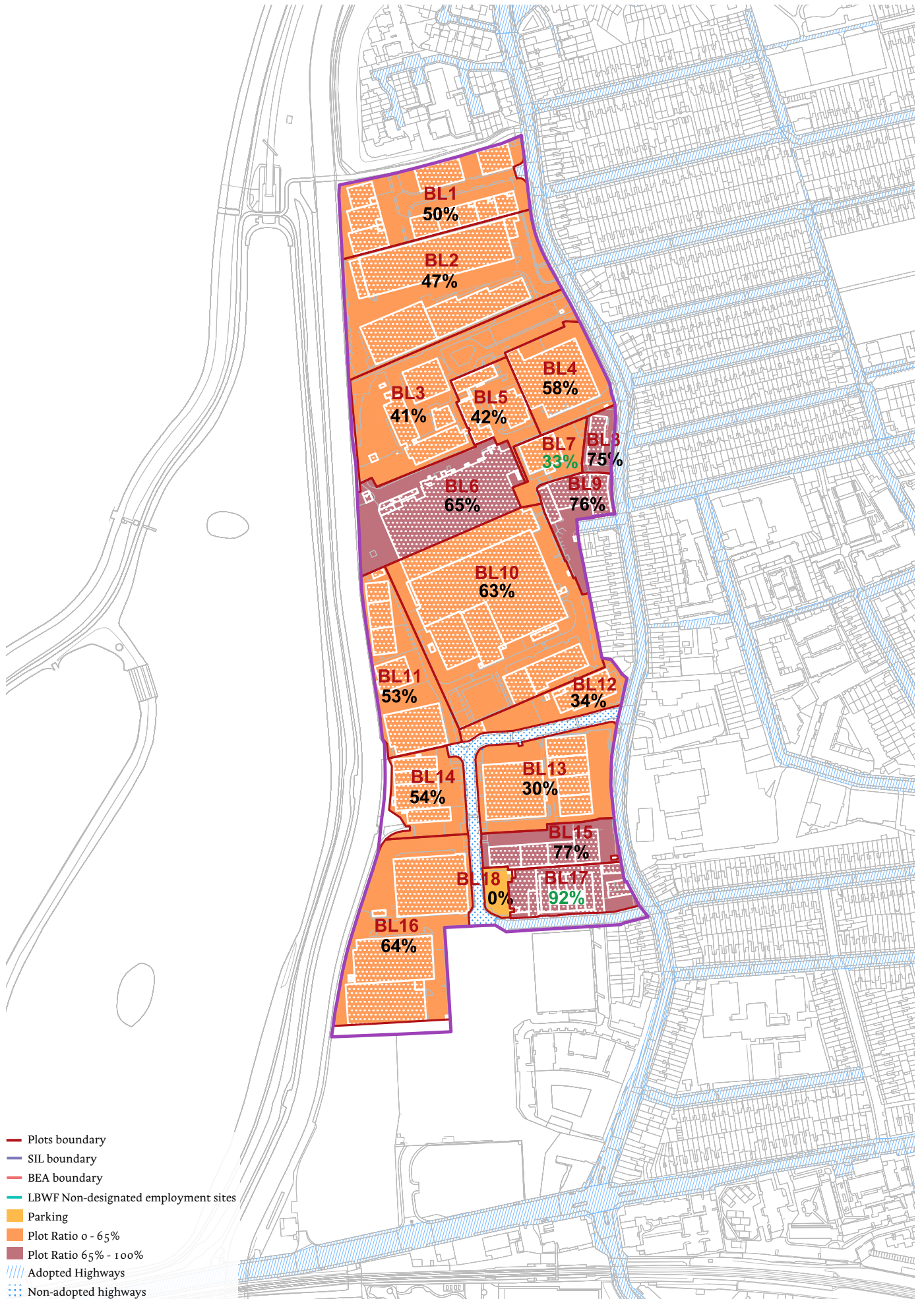
Plot_ID	BL1	BL10	BL11	BL12	BL13	BL14	BL15	BL16	BL17	BL2	
Plot Area	11,327	25,247	8,458	4,062	10,329	5,062	4,551	16,191	4,848	17,907	
Footprint	5,091	15,853	4,126	1,524	5,188	2,420	2,198	9,194	4,128	9,877	
Plot Coverage %	45%	63%	49%	38%	50%	48%	48%	57%	85%	55%	
VOA Data	Total Properties	9	25	5	2	1	2	9	2	4	1
	Basement	-	-	-	-	-	-	-	-	-	-
	Ground Floor	4,521	15,231	3,901	1,327	2,635	2,321	2,816	9,259	2,646	7,539
	First Floor	1,023	152	416	-	186	316	565	821	176	627
	Second Floor	-	-	-	-	186	-	-	-	-	-
	Mezzanine	547	675	1,168	300	150	380	725	703	951	620
	Operational business space	-	91	254	912	-	-	-	2,566	-	-
	Yard	282	17	-	-	-	-	-	-	-	-
	Car Parks	887	1,233	323	230	346	449	161	829	92	1,037
	Total Area	7,259	17,398	6,062	2,769	3,502	3,466	4,267	14,179	3,866	9,822
Floorspace	5,544	15,383	4,317	1,327	3,007	2,637	3,381	10,081	2,823	8,165	
OS Mapping Measurement									4,441		
Costar Data									2,311		
Egi Data									-		
Plot Ratio %	50%	63%	53%	34%	30%	54%	77%	64%	94%	47%	
TOTAL Built Floorspace	5,544	15,383	4,317	1,327	3,007	2,637	3,381	10,081	4,441	8,165	
TOTAL Area	7,259	17,398	6,062	2,769	3,502	3,466	4,267	14,179	4,441	9,822	



3.6 SIL SITES - PLOT RATIO AND UPLIFT

SIL 3 BLACKHORSE LANE

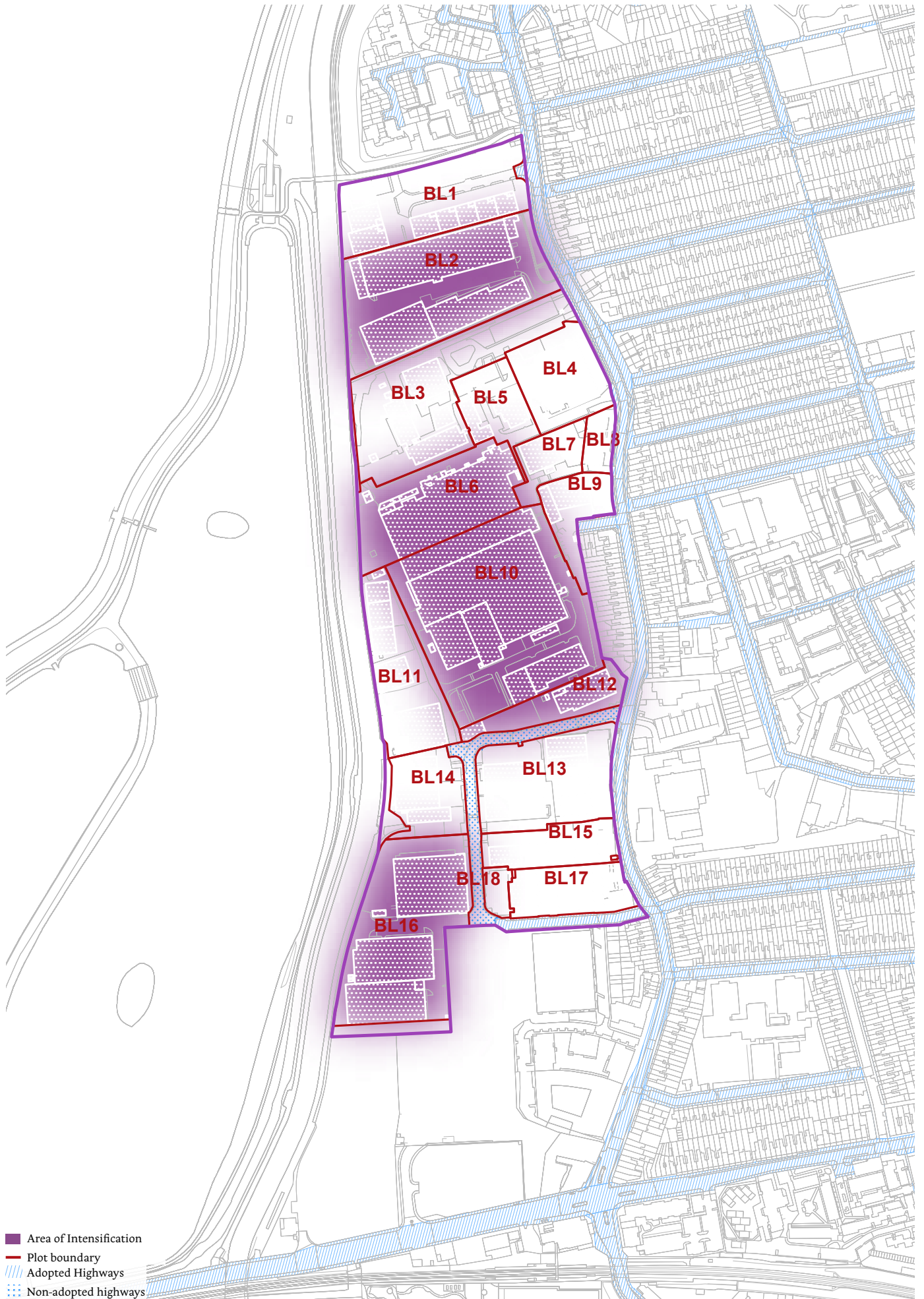
Plot_ID	BL3	BL4	BL5	BL6	BL7	BL8	BL9	BL18	Grand Total
Plot Area	14,354	6,358	4,331	10,879	3,056	1,528	3,659	1,066	153,213
Footprint	3,237	3,624	1,783	7,043	994	645	1,972	-	78,897
Plot Coverage %	23%	57%	41%	65%	33%	42%	54%	0%	
VOA Data	Total Properties	1	8	35	6	2	2	1	
	Basement	826	-	-	-	-	-	-	
	Ground Floor	1,629	3,189	764	6,841	254	1,110	1,837	67,820
	First Floor	1,629	400	744	-	-	-	846	7,902
	Second Floor	1,629	-	-	-	-	-	-	1,815
	Mezzanine	-	153	-	-	-	34	-	6,406
	Operational business space	708	206	-	-	-	-	953	5,690
	Yard	-	-	-	-	-	-	988	1,286
	Car Parks	230	230	81	-	23	69	-	6,221
	Total Area	6,652	4,177	1,589	6,841	277	1,213	4,624	No data
Floorspace	5,713	3,588	1,509	6,841	254	1,110	2,683	0	78,363
OS Mapping Measurement					994			-	
Costar Data			1,767		896			-	
Egi Data			-		-			-	
Plot Ratio %	41%	58%	42%	65%	34%	75%	76%	0%	
TOTAL Built Floorspace	5,713	3,588	1,767	6,841	994	1,110	2,683	-	80,979
TOTAL Area	6,652	4,177	1,767	6,841	994	1,213	4,624	-	99,434



3.6 SIL SITES - PLOT RATIO AND UPLIFT

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
SIL3	Blackhorse Lane					

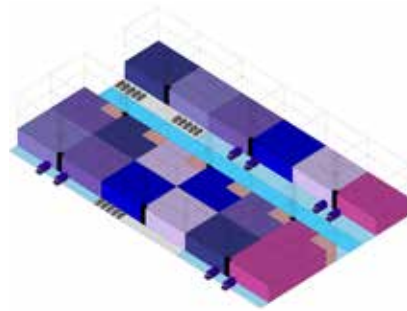
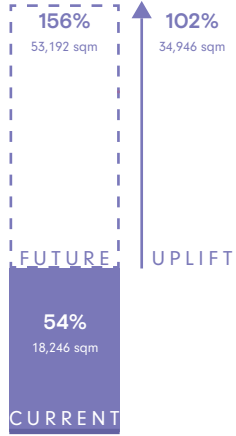


3.6 SIL SITES – PLOT RATIO AND UPLIFT

Potential intensification

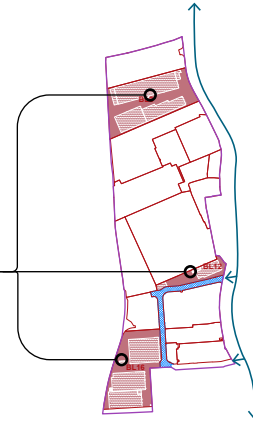
SIL 3 OPTIONS		1			2	3
		Underperformance Site Development			Central Development	Development Option 1+2
Current Condition	Plot IDs	BL12	BL16		BL6 + BL10	BL12 + BL16 + BL6 + BL10
	Plot Area	17,907	16,191	34,098	36,126	70,223
	Plot Ratio	46%	62%	54%	62%	58%
	Built Floorspace	8,165	10,081	18,246	22,225	40,471
Potential Uplift	Typology	B	B		A	A+B
	Potential Plot Ratio	156%	156%		200%	254%
	Future Built Floorspace	27,935	25,258	53,192	72,251	178,636
	Built Floorspace Uplift sqm	19,769	15,177	34,946	50,027	84,973
	Potential Increase in Plot Ratio	110%	94%	102%	138%	120%

Scenario 1

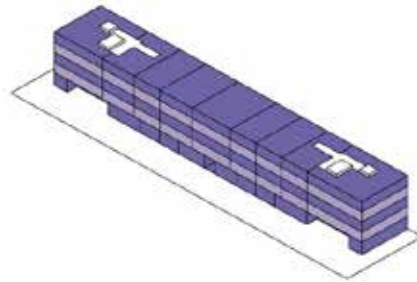
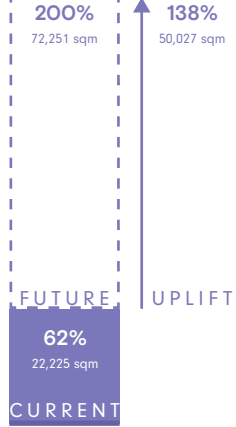


Typology B: Shared Yard

- Plot Ratio: 156%

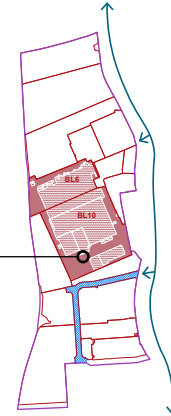


Scenario 2

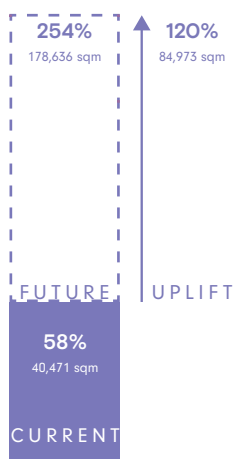


Typology A: Industrial Building

- Plot Ratio: 200%

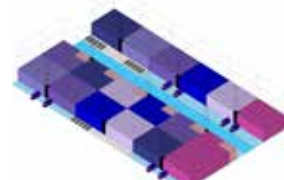
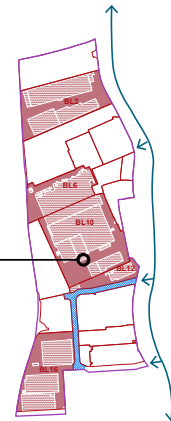


Scenario 3



Typology A: Industrial Building

- Plot Ratio: 200%



Typology B: Shared Yard

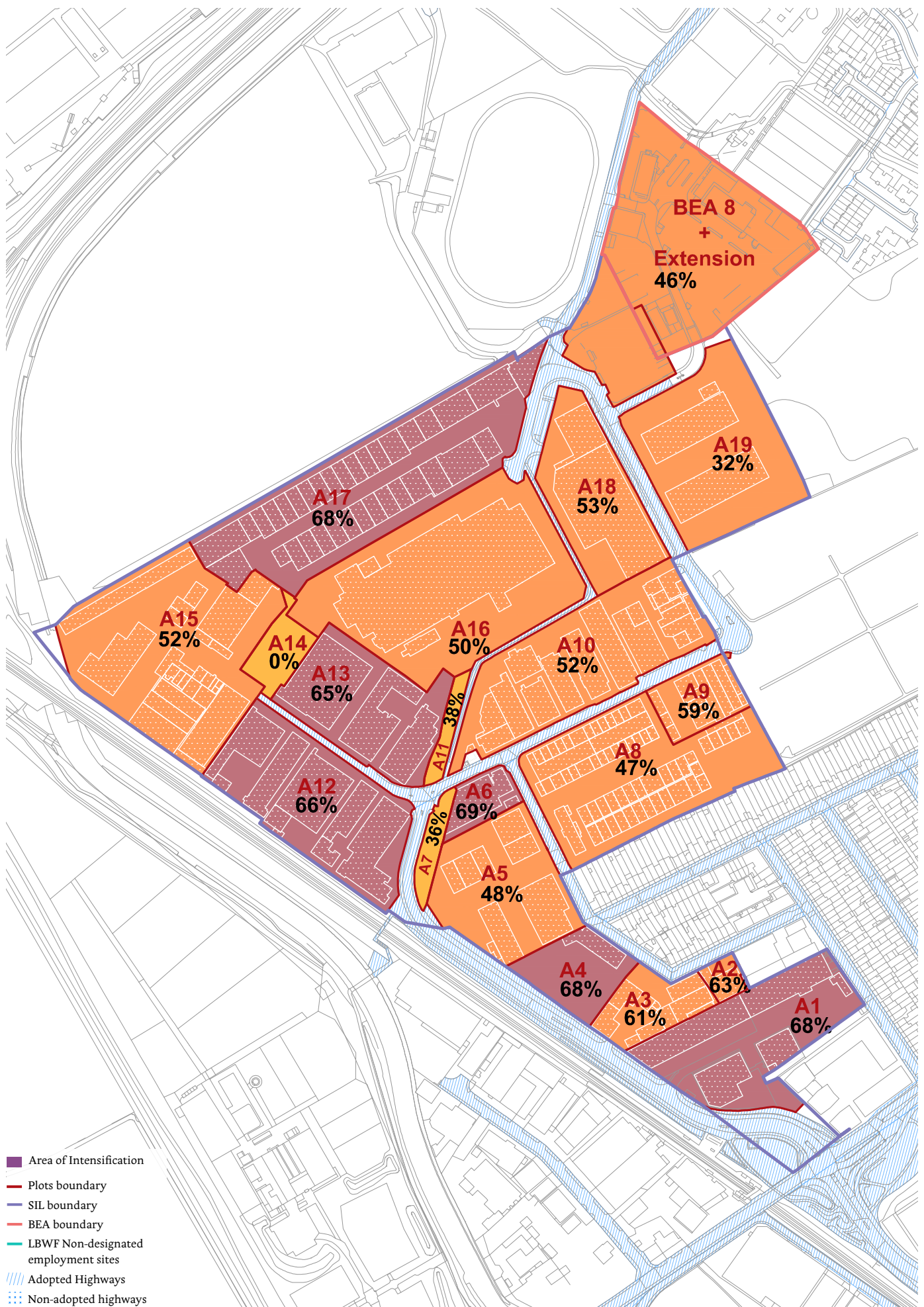
- Plot Ratio: 156%

- Area of Intensification
- ➔ Access
- Plots boundary

3.6 SIL SITES - PLOT RATIO AND UPLIFT

SIL 4 ARGALL AVENUE

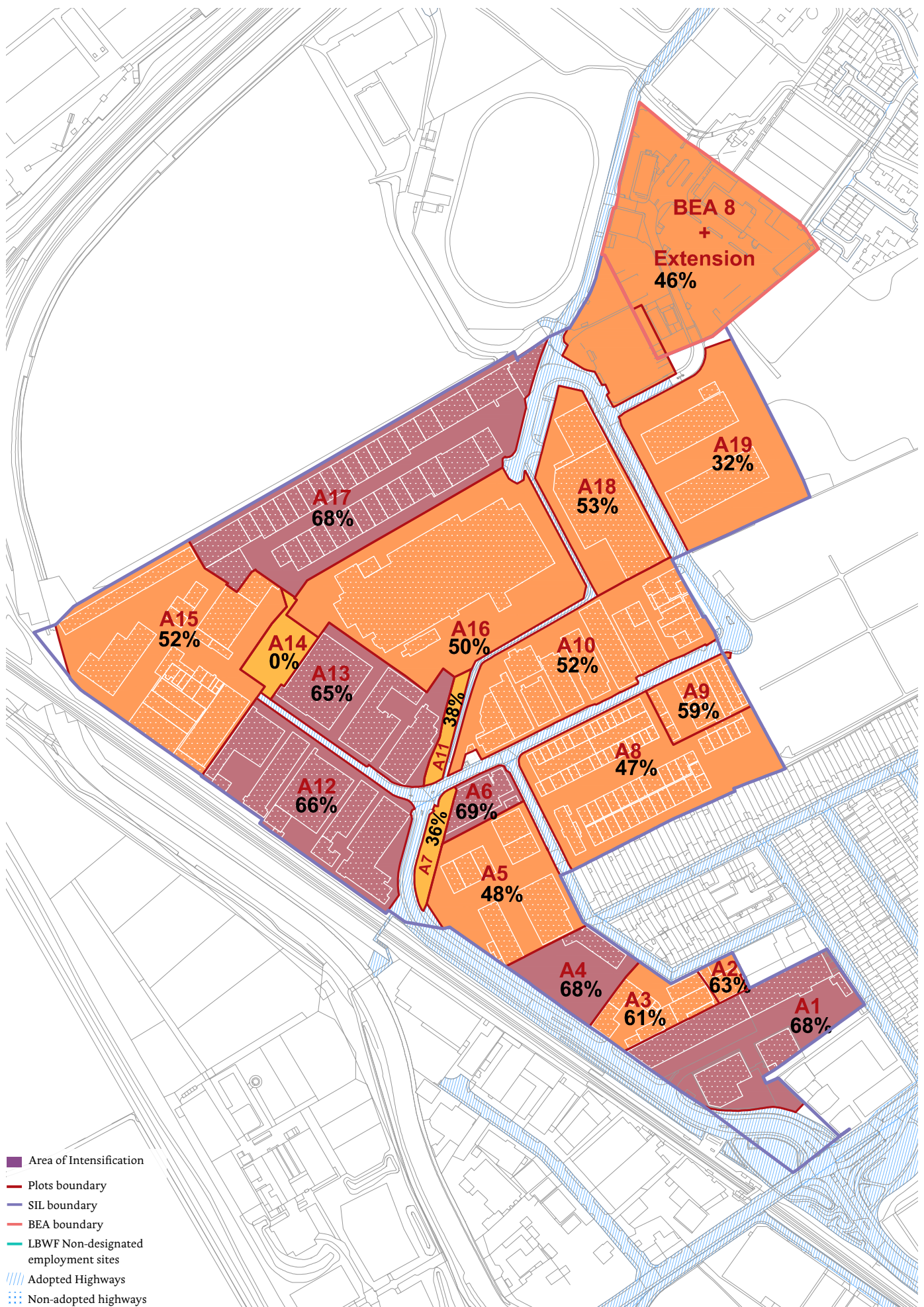
Plot_ID	A1	A10	A11	A12	A13	A15	A16	A17	A18	A19
Plot Area	15,701	19,599	1,424	17,503	13,215	25,914	29,883	27,241	12,066	18,572
Footprint	7,251	11,635	-	10,937	8,171	13,572	14,892	16,400	7,884	5,648
Plot Coverage %	0	59%	0%	62%	62%	52%	50%	60%	65%	30%
VOA Data	Total Properties									
	Basement	-	-	-	-	-	-	-	-	-
	Ground Floor	10,182	8,817	530	10,887	7,597	12,187	15,090	15,338	6,215
	First Floor	150	1,044	-	320	526	767	1,052	2,210	-
	Second Floor	-	-	-	-	208	-	106	509	-
	Mezzanine	-	984	-	270	303	976	230	3,620	324
	Operational business space	2,668	224	-	-	-	-	3,476	521	2,850
	Yard	-	-	-	-	-	-	-	-	-
	Car Parks	115	357	-	173	288	1,233	-	1,233	138
	Total Area	13,115	11,427	530	11,650	8,921	15,162	19,955	23,430	9,527
Floorspace	10,182	9,862	530	11,207	8,330	12,954	16,249	18,057	6,215	
OS Mapping Measurement										
Costar Data										
Egi Data										
Plot Ratio %	67%	52%	38%	66%	65%	52%	56%	68%	53%	32%
TOTAL Built Floorspace	10,182	9,862	530	11,207	8,330	12,954	16,249	18,057	6,215	5,757
TOTAL Area	13,115	11,427	530	11,650	8,921	15,162	19,955	23,430	9,527	8,185



3.6 SIL SITES - PLOT RATIO AND UPLIFT

SIL 4 ARGALL AVENUE

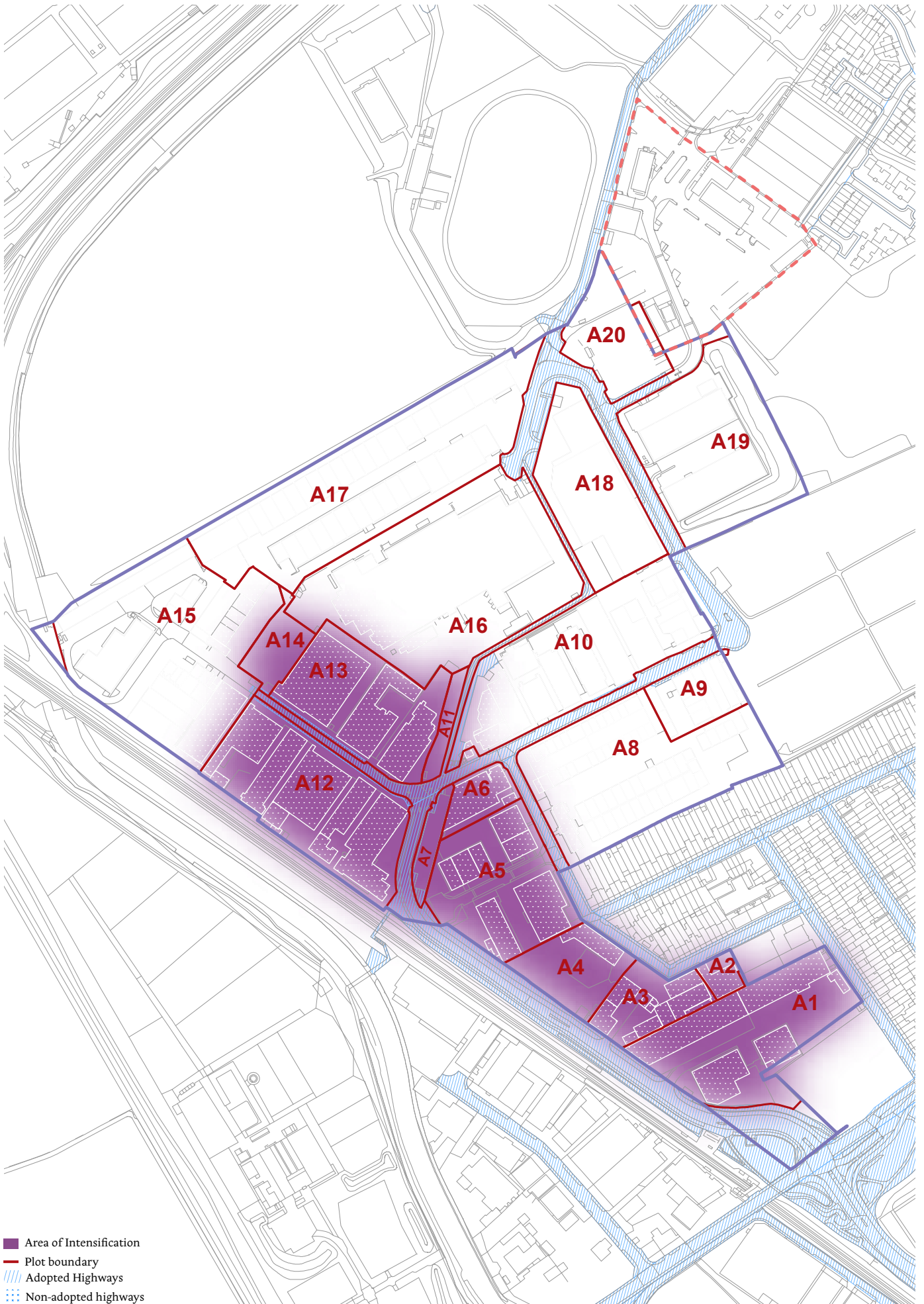
Plot_ID	A3	A4	A5	A7	A8	A9	A2	A6	A14	Grand Total	
Plot Area	5,087	5,661	13,148	1,766	20,681	4,417	1,195	2,671	2,913	238,653	
Footprint	2,934	846	5,475	-	10,647	2,922	748	1,848	-	121,808	
Plot Coverage %	58%	15%	42%	0%	51%	66%	63%	69%	0%		
VOA Data	Total Properties									-	
	Basement	-	-	-	-	-	-			-	
	Ground Floor	2,778	3,731	4,947	622	8,841	2,542			115,655	
	First Floor	242	-	1,136	-	381	-			8,232	
	Second Floor	-	-	-	-	234	-			1,057	
	Mezzanine	734	-	652	-	2,210	170			10,473	
	Operational business space	367	756	248	-	713	29			14,027	
	Yard	-	-	-	-	-	-				-
	Car Parks	115	-	864	-	979	46				5,795
	Total Area	4,237	4,487	7,847	622	13,357	2,787				155,239
Floorspace	3,021	3,731	6,083	622	9,455	2,542				124,795	
OS Mapping Measurement							748	1,848	-	2,596	
Costar Data										-	
Egi Data										-	
Plot Ratio %	61%	68%	48%	36%	47%	59%	64%	71%	0%		
TOTAL Built Floorspace	3,021	3,731	6,083	622	9,455	2,542	748	1,848	-	127,391	
TOTAL Area	4,237	4,487	7,847	622	13,357	2,787	748	1,848	-	157,835	



3.6 SIL SITES - PLOT RATIO AND UPLIFT

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Limitations to servicing increased activity	Ability to co-locate business activities	Landowner and business aspirations
SIL4	Argall Avenue						



3.6 SIL SITES – PLOT RATIO AND UPLIFT

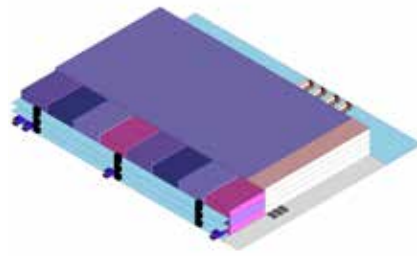
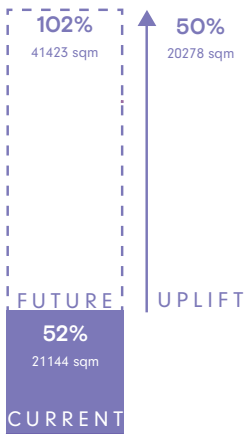
Potential intensification

SIL 4 OPTIONS		1			
		Areas of intensification 1 & 2			*2-3 storeys typologies
Current Condition	Plot IDs	A4, A6, A7	A5	A11, A13, A14	
	Plot Area	10,097	13,148	17,551	40,796
	Plot Ratio	61%	46%	50%	52%
	Built Floorspace	6,201	6,083	8,860	21,144
Potential Uplift	Typology	C	C	C	
	Potential Plot Ratio	88%	130%	88%	102%
	Future Built Floorspace	8,886	17,092	15,445	41,423
	Built Floorspace Uplift sqm	2,684	11,009	6,585	20,278
	Potential Increase in Plot Ratio	27%	84%	38%	50%

SIL 4 OPTIONS		2		
		Areas of intensification 1 & 2		*2 storeys typologies
Current Condition	Plot IDs	A1, A2, A3, A4, A5, A6, A7	A11, A12*, A13, A14	
	Plot Area	39,567	30,771	70,338
	Plot Ratio	67%	65%	66%
	Built Floorspace	26,384	20,067	46,452
Potential Uplift	Typology	B	B	
	Potential Plot Ratio	100%	100%	100%
	Future Built Floorspace	39,567	30,771	70,338
	Built Floorspace Uplift sqm	13,183	10,704	23,886
	Potential Increase in Plot Ratio	33%	35%	34%

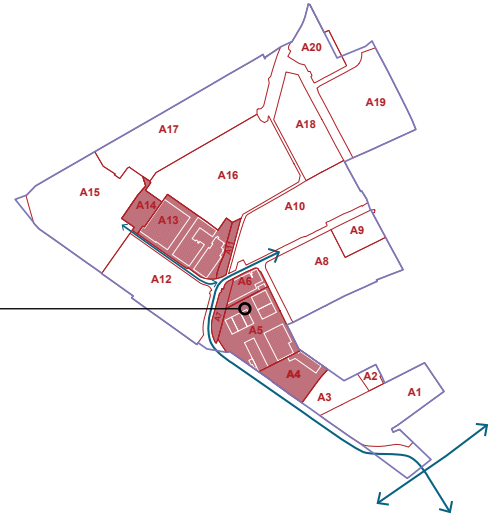
Scenario 1

Redevelopment of area of intensification 1 & 2 with Small stackable units attached to existing large ground-dependent units (2 -3 storeys)



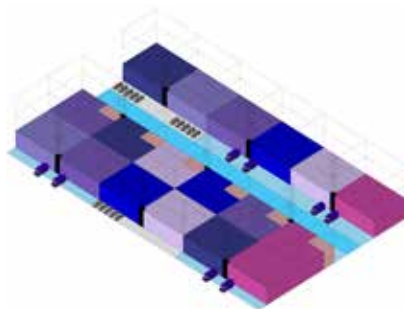
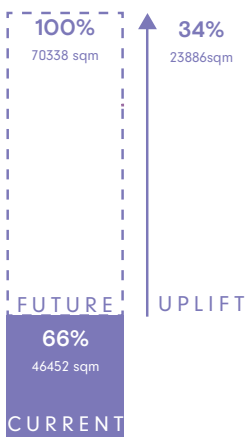
Typology C: Attached Structure

- Plot Ratio (2 storeys): 88%
- Plot Ratio (3 storeys): 110%



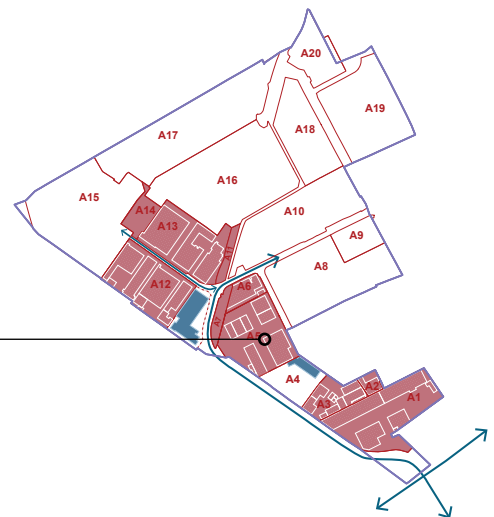
Scenario 2

Redevelopment of area of intensification 1 & 2 with a mix of small and medium units with shared yard (2 storeys). Fixes are not included.



Typology B: Shared Yard

- Plot Ratio (2 storeys): 100%

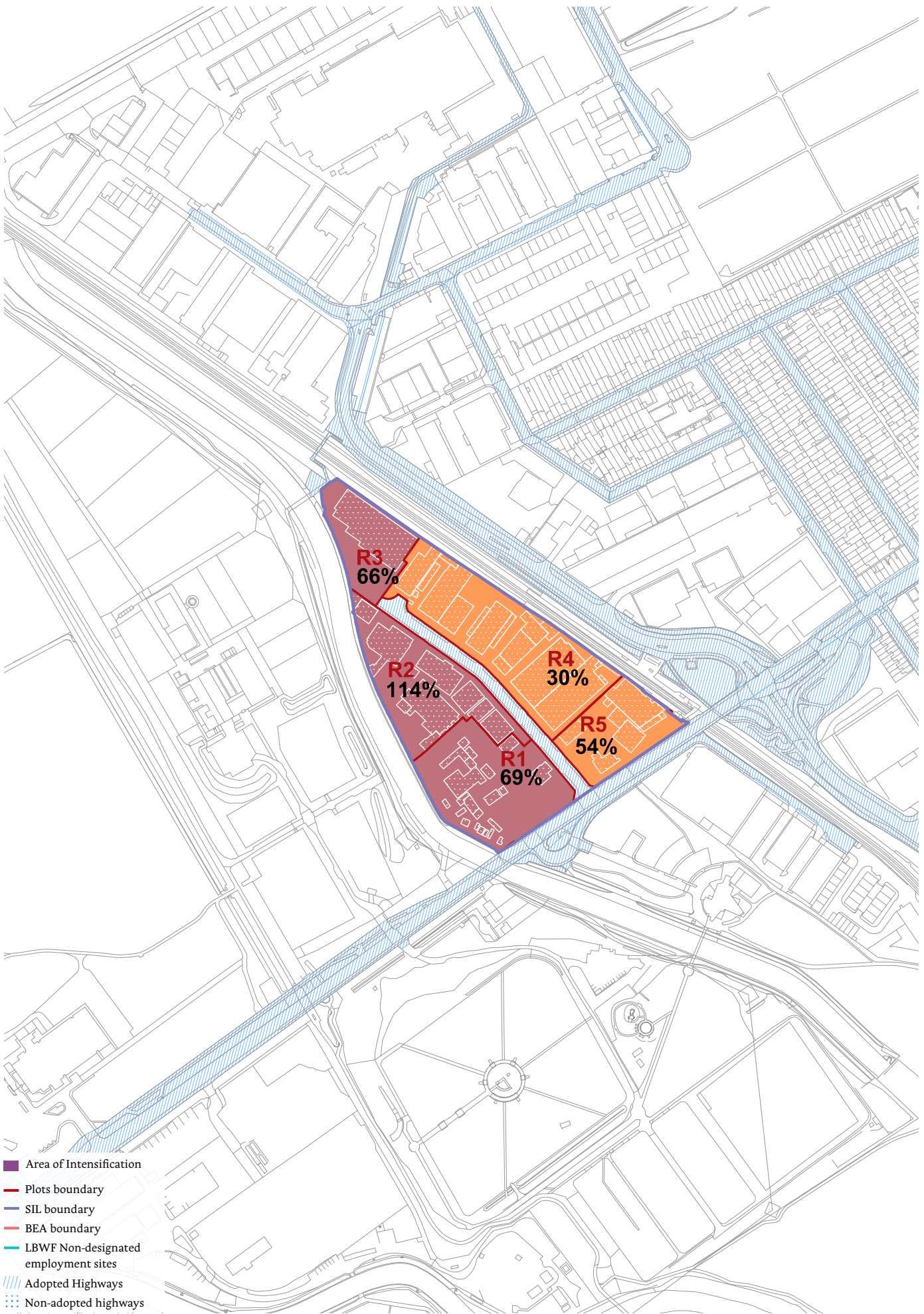


- Area of Intensification
- Fixes
- ➔ Access
- Plots boundary

3.6 SIL SITES - PLOT RATIO AND UPLIFT

SIL 5 RIGG APPROACH

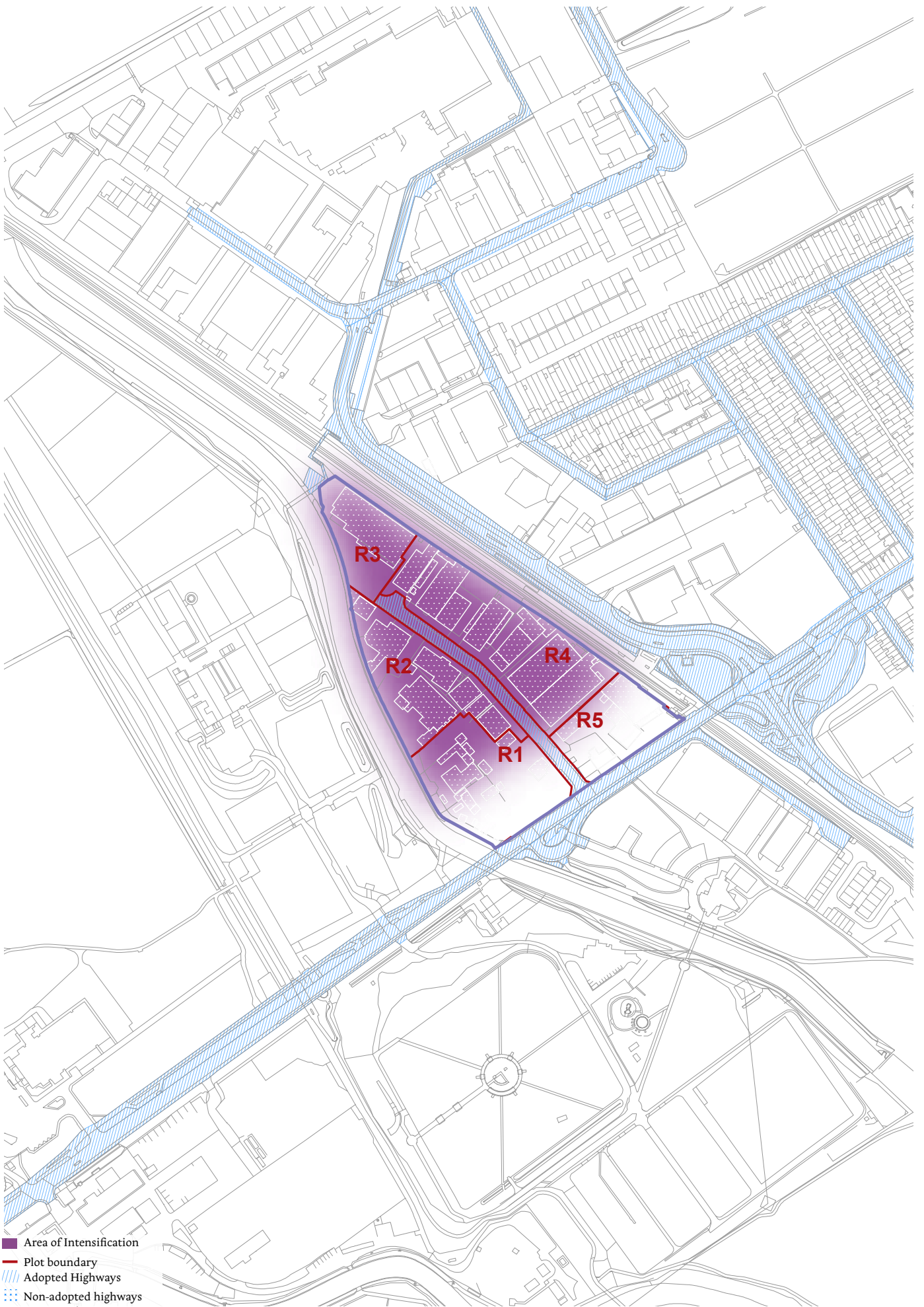
Plot_ID	R1	R2	R3	R4	R5	Grand Total
Plot Area	10,735	9,938	5,524	14,840	6,143	47,180
Footprint	2,030	5,098	2,593	9,153	2,542	21,416
Plot Coverage %	19%	51%	47%	62%	41%	
VOA Data	Total Properties					-
	Basement	-	-	-	-	-
	Ground Floor	7,211	9,166	3,451	2,934	22,761
	First Floor	-	1,267	95	1,348	2,710
	Second Floor	-	539	-	107	646
	Mezzanine	-	-	292	-	292
	Operational business space	804	612	235	320	1,971
	Yard	-	552	-	-	552
	Car Parks	92	541	588	161	1,382
	Total Area	8,107	12,677	4,660	4,871	30,315
	Floorspace	7,211	10,972	3,545	4,389	26,118
OS Mapping Measurement				4,525	3,328	7,853
Costar Data						
Egi Data						
Plot Ratio %	69%	114%	66%	31%	56%	
TOTAL Built Floorspace	7,211	10,972	3,545	4,525	3,328	29,581
TOTAL Area	8,107	12,677	4,660	4,871	3,328	33,643



3.6 SIL SITES - PLOT RATIO AND UPLIFT

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Limitations to servicing increased activity	Ability to co-locate business activities	Landowner and business aspirations
SIL5	Rigg Approach						



- Area of Intensification
- Plot boundary
- ▨ Adopted Highways
- ▨ Non-adopted highways

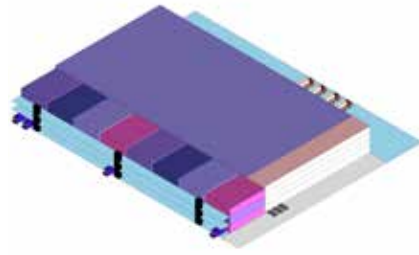
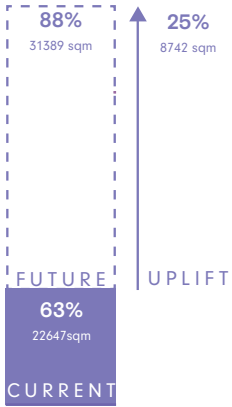
3.6 SIL SITES – PLOT RATIO AND UPLIFT

Potential intensification

SIL 5 OPTIONS		1	2
		Subarea redevelopment (2 Storey)	Subarea redevelopment (2 Storey)
Current Condition	Plot IDs	R1(50%), R2, R3, R4	R1(50%), R2, R3, R4
	Plot Area	35,670	35,670
	Plot Ratio	63%	63%
	Built Floorspace	22,647	22,647
Potential Uplift	Typology	C	B
	Potential Plot Ratio	88%	100%
	Future Built Floorspace	31,389	35,670
	Built Floorspace Uplift sqm	8,742	13,022
	Potential Increase in Plot Ratio	25%	37%

Scenario 1

Redevelopment of area of intensification 3 with Small stackable units attached to existing large ground-dependent units (2 storeys)

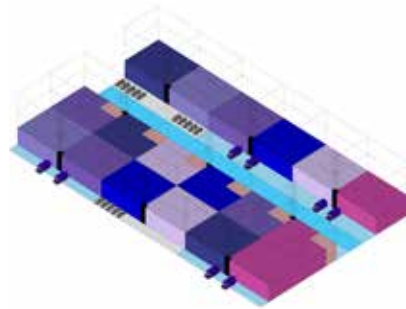
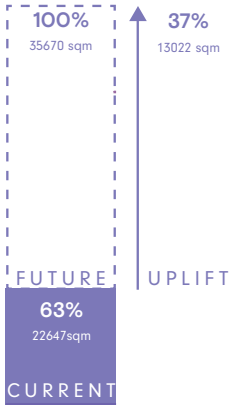


Typology C: Attached Structure

- Plot Ratio (2 storeys): 88%
- Plot Ratio (3 storeys): 110%

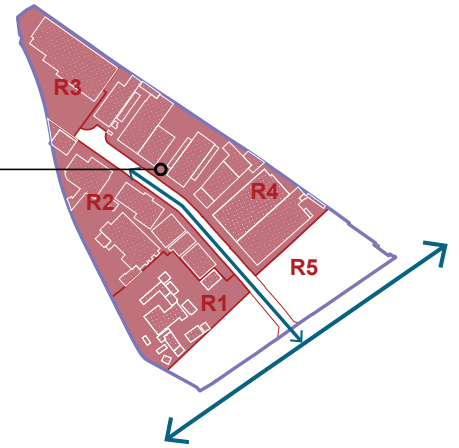
Scenario 2

Redevelopment of area of intensification 3 with a mix of small and medium units with shared yard (2 storeys).



Typology B: Shared Yard

- Plot Ratio (2 storeys): 100%
- Plot Ratio (3-4 storeys): 156%

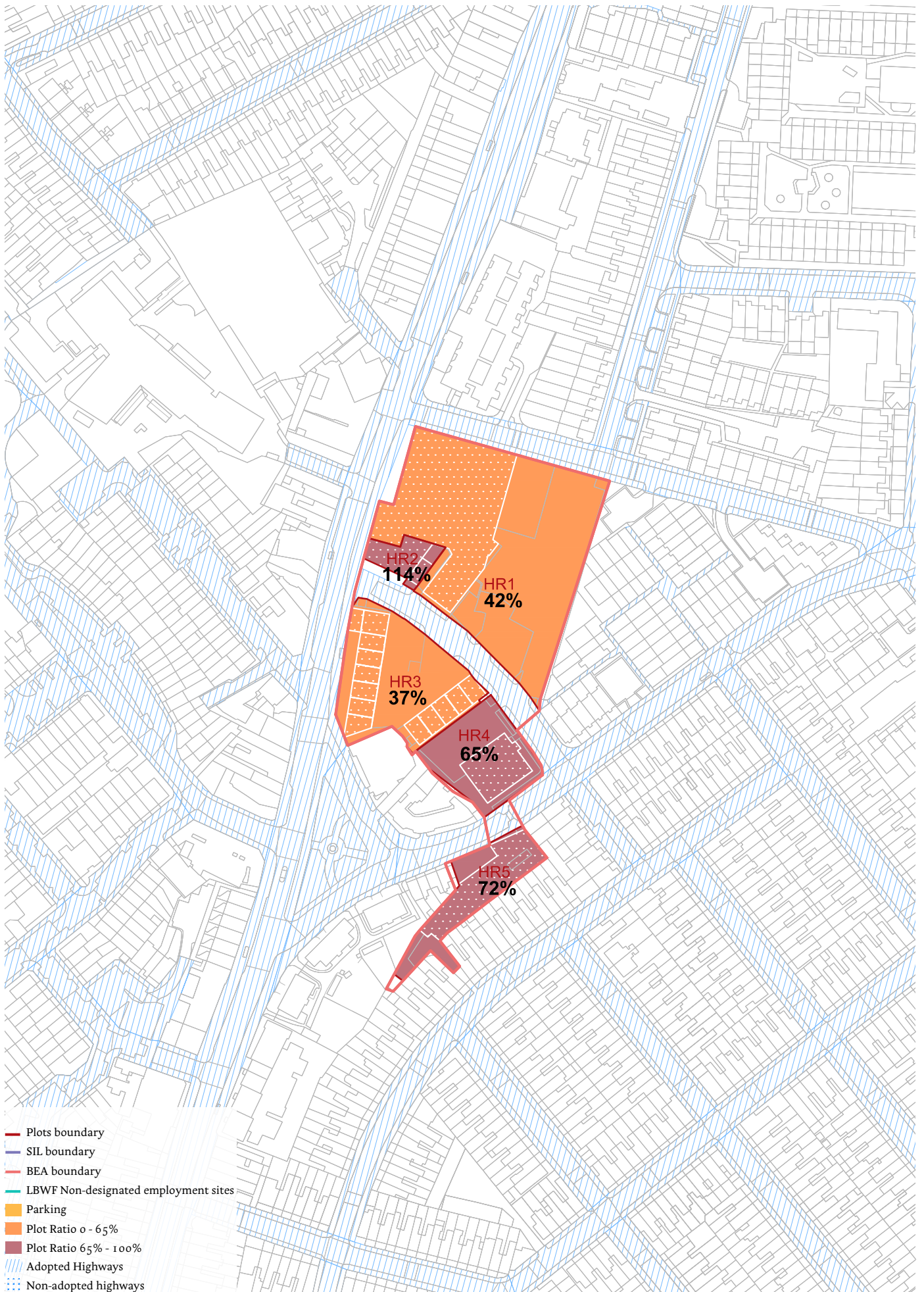


- Area of Intensification
- Fixes
- Access
- Plots boundary

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 1 HOWARD ROAD

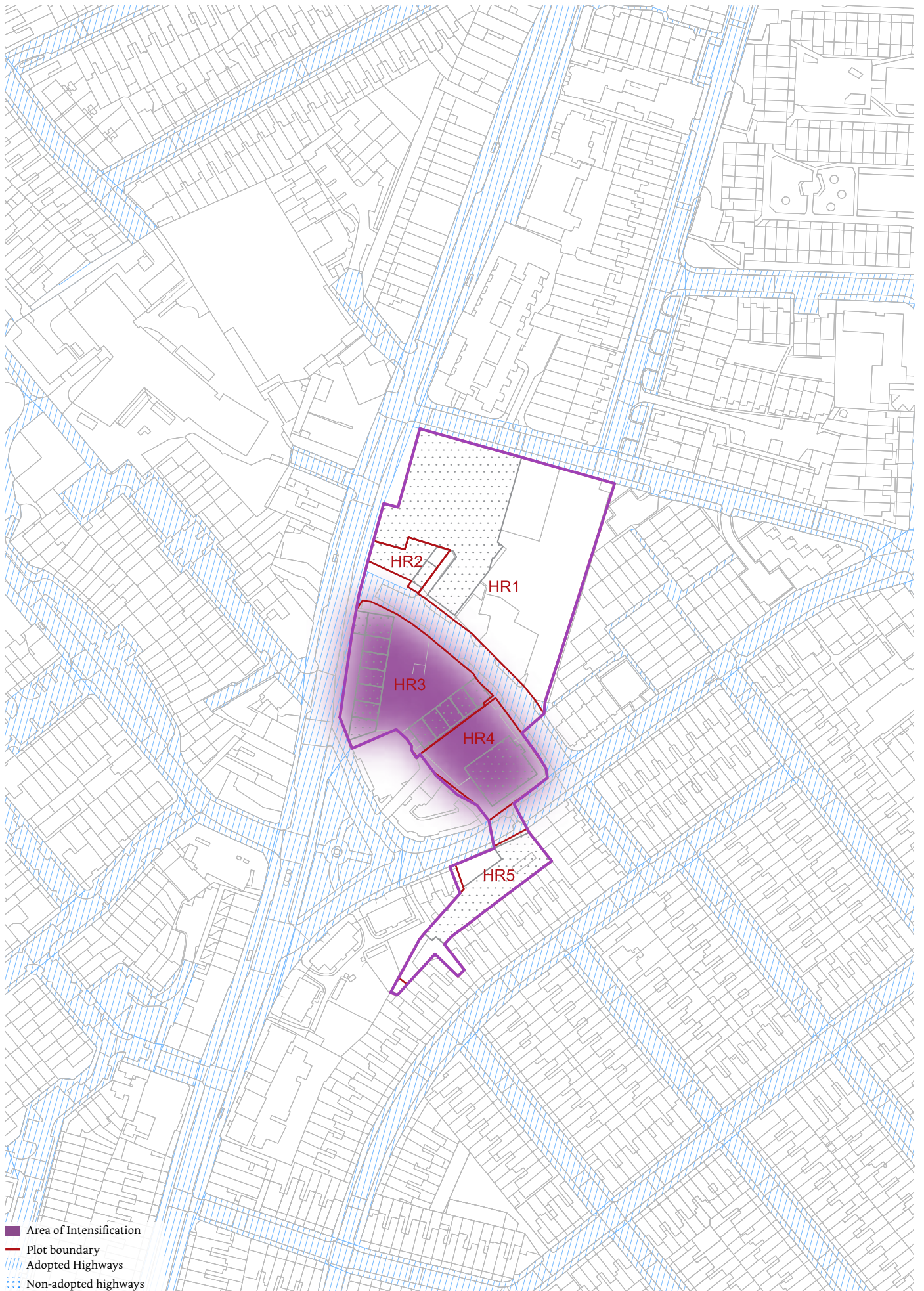
Plot_ID	HR1	HR2	HR3	HR4	HR5	Grand Total	
Plot Area	6,581	435	2,658	1,524	1,239	12,437	
Footprint	2,694	372	1,043	497	831	5,437	
Plot Coverage %	41%	86%	39%	33%	67%		
VOA Data	Total Properties					-	
	Basement	-	-	-		-	
	Ground Floor	2,561	346	806		3,713	
	First Floor	145	262	142		549	
	Second Floor	-	-	-		-	
	Mezzanine	847	-	159		1,005	
	Operational business space	-	-	159		159	
	Yard	558	-	2		560	
	Car Parks	-	-	161		161	
	Total Area	4,111	608	1,428	No Data	No Data	6,147
	Floorspace	2,706	608	948			4,262
OS Mapping Measurement				995	887		
Costar Data							
Egi Data							
Plot Ratio %	42%	144%	37%	67%	74%		
TOTAL Built Floorspace	2,706	608	948	995	887	6,143	
TOTAL Area	4,111	608	1,428	995	887	8,028	



3.7 BEA SITES - PLOT RATIO AND UPLIFTS

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
BEA 1	Howard Road					



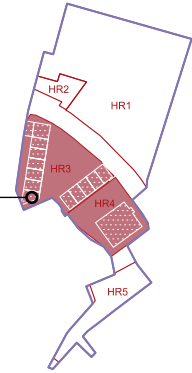
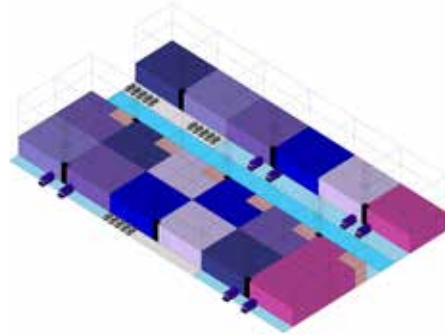
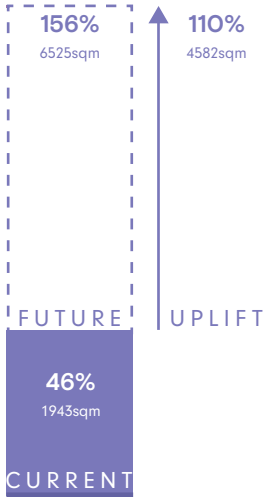
- Area of Intensification
- Plot boundary
- ▨ Adopted Highways
- ▨ Non-adopted highways

3.7 BEA SITES – PLOT RATIO AND UPLIFTS

Potential intensification

BEA 1 OPTIONS		1
		Partial redevelopment
Current Condition	Plot IDs	HR3+HR4
	Plot Area	4,182
	Plot Ratio	46%
	Built Floorspace	1,943
Potential Uplift	Typology	B
	Potential Plot Ratio	156%
	Future Built Floorspace	6,525
	Built Floorspace Uplift sqm	4,582
	Potential Increase in Plot Ratio	110%

Scenario 1: Industrial Intensification with a Shared yard multi-storey building



Typology B: Shared Yard

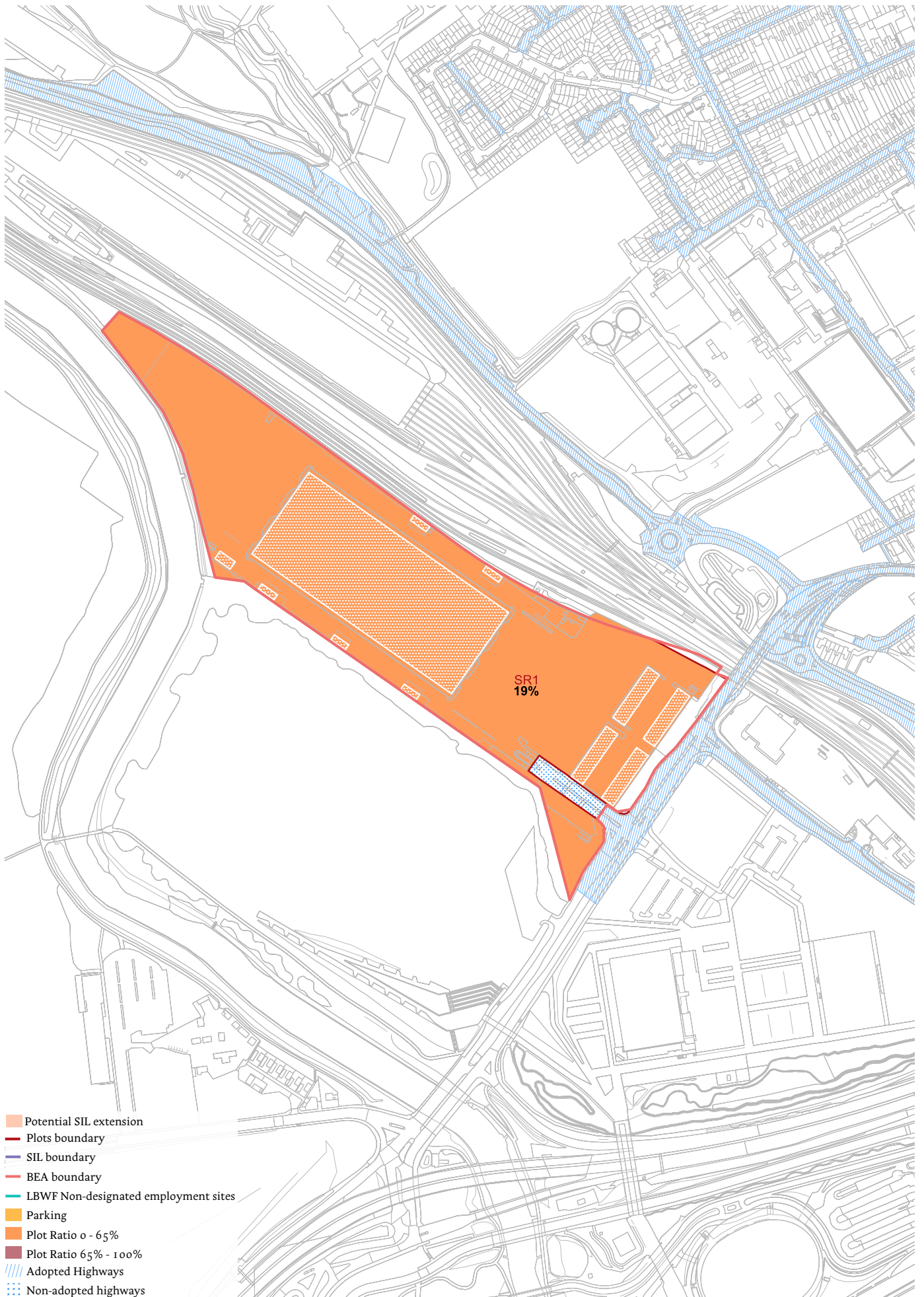
- Plot Ratio: 156%

- Area of Intensification
- ➔ Access
- Plots boundary

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 2 SHERRIN ROAD

Plot_ID	SR1	Grand Total
Plot Area	113,804	113,804
Footprint	33,546	33,546
Plot Coverage %	29%	
VOA Data	Total Properties	-
	Basement	-
	Ground Floor	19,866
	First Floor	631
	Second Floor	-
	Mezzanine	969
	Operational business space	997
	Yard	3,024
	Car Parks	-
	Total Area	25,488
	Floorspace	20,497
OS Mapping Measurement		
Costar Data		
Egi Data		
Plot Ratio %	19%	
TOTAL Built Floorspace	20,497	20,497
TOTAL Area	25,488	25,488

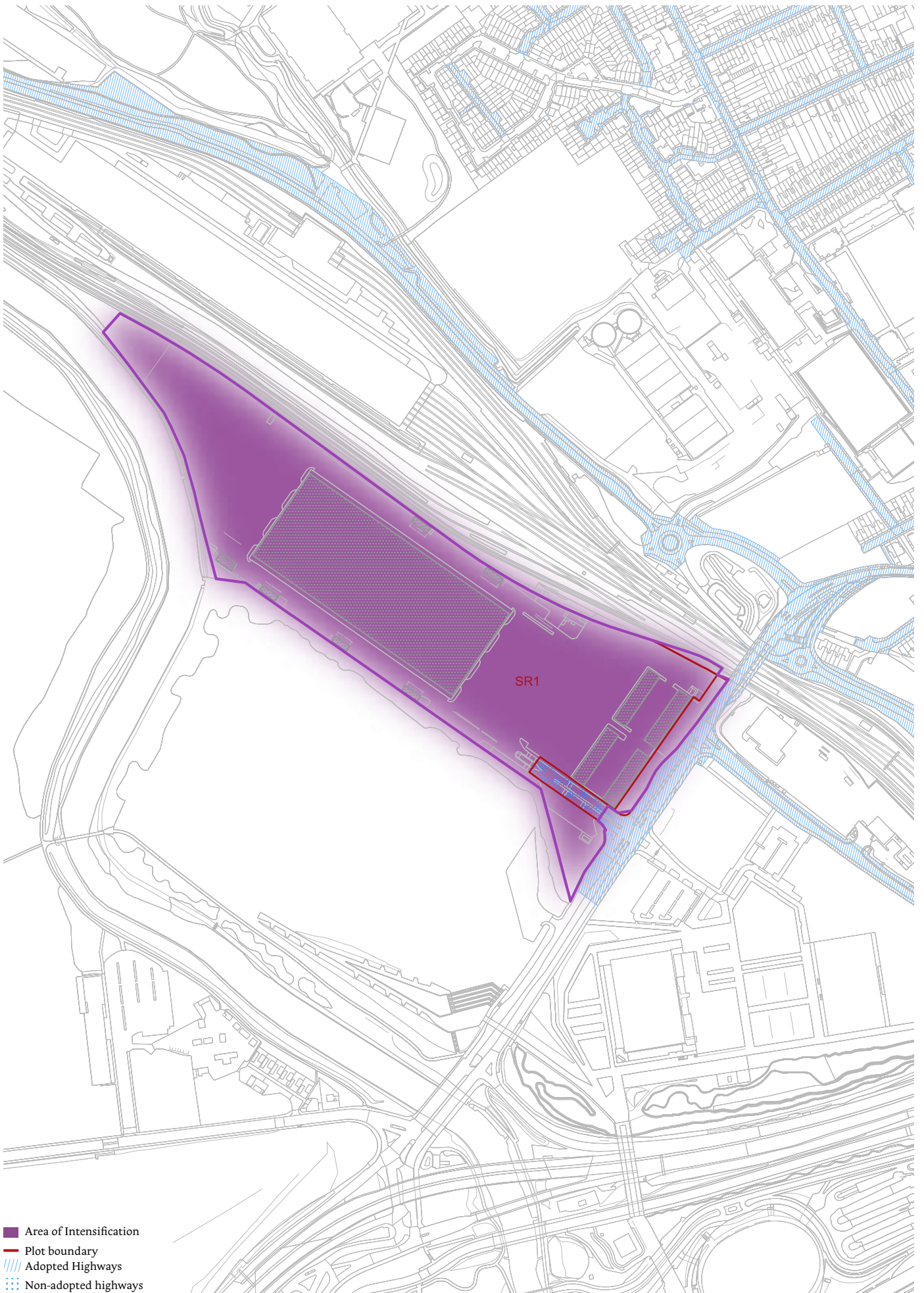


- Potential SIL extension
- Plots boundary
- SIL boundary
- BEA boundary
- LBWF Non-designated employment sites
- Parking
- Plot Ratio 0 - 65%
- Plot Ratio 65% - 100%
- Adopted Highways
- Non-adopted highways

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
BEA 2	Sherrin Road	██████████	██████████	██████████	██████████	██████████

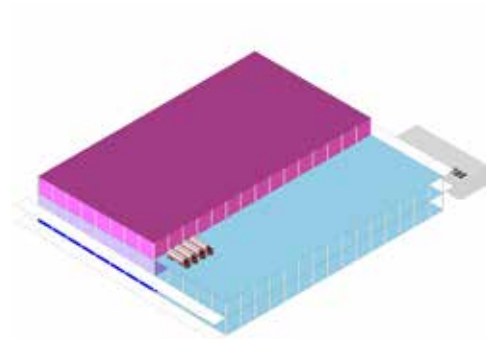
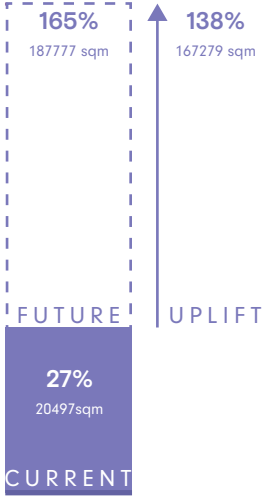


3.7 BEA SITES – PLOT RATIO AND UPLIFTS

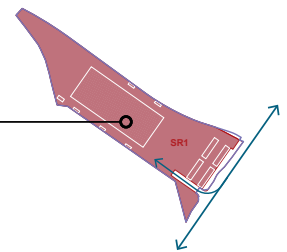
Potential intensification

BEA 2 OPTIONS		1	2
		Whole site redevelopment: 3 floors	Whole site redevelopment: 5 floors
Current Condition	Plot IDs	SR1	SR1
	Plot Area	113,804	113,804
	Plot Ratio	27%	27%
	Built Floorspace	20,497	20,497
Potential Uplift	Typology	D	E
	Potential Plot Ratio	165%	200%
	Future Built Floorspace	187,777	227,608
	Built Floorspace Uplift sqm	167,279	207,111
	Potential Increase in Plot Ratio	138%	173%

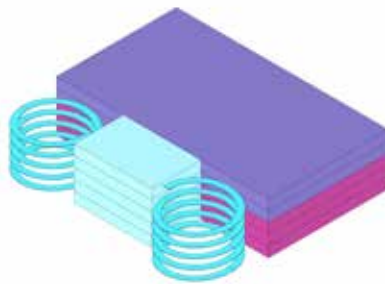
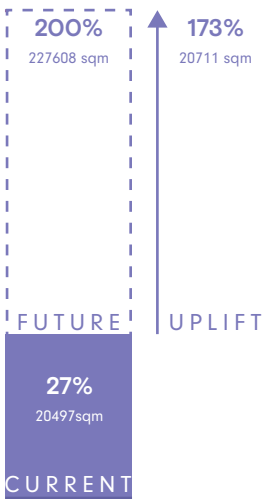
Scenario 1: Industrial Intensification with a 3 Multi-storey Industrial Building



Typology D: Multi-storey Industrial 3 Storey
 • Plot Ratio: 165%



Scenario 2: Industrial Intensification with a 5 Multi-storey Industrial Building



Typology E: Multi-storey Industrial 5 Storey
 • Plot Ratio: 200%

- Area of Intensification
- ➔ Access
- Plots boundary

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 6 CHURCH ROAD

Plot_ID	CR1	CR10	CR13	CR14	CR15	CR2	CR3	CR4	CR5	CR6	
Plot Area	2,060	2,328	555	1,671	524	1,600	8,235	1,169	12,959	8,860	
Footprint	646	2,086	434	532	100	162	4,222	417	6,528	1,790	
Plot Coverage %	31%	90%	78%	32%	19%	10%	51%	36%	50%	20%	
VOA Data	Total Properties	12	1	1	1	1	1	1	65	2	1
	Basement	-	-	-	-	-	-	-	-	-	-
	Ground Floor	536	1,601	414	501	527	765	4,134	352	5,348	671
	First Floor	179	156	117	-	-	-	-	661	114	-
	Second Floor	413	-	-	-	-	-	-	523	116	-
	Mezzanine	-	-	-	-	-	-	-	-	3,713	-
	Operational business space	-	339	-	478	-	-	-	102	-	-
	Yard	-	-	-	-	-	-	-	-	243	-
	Car Parks	323	161	12	104	-	230	369	-	230	23
	Total Area	1,450	2,257	543	1,082	527	996	4,503	1,638	9,765	694
Floorspace	1,128	1,757	531	501	527	765	4,134	1,536	5,578	671	
OS Mapping Measurement					100					1644	
Costar Data					527					1284	
Egi Data					0					0	
Plot Ratio %	56%	78%	99%	31%	104%	49%	52%	135%	44%	19%	
TOTAL Built Floorspace	1,128	1,757	531	501	527	765	4,134	1,536	5,578	1,644	
TOTAL Area	1,450	2,257	543	1,082	527	996	4,503	1,638	9,765	1,644	



3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 6 CHURCH ROAD

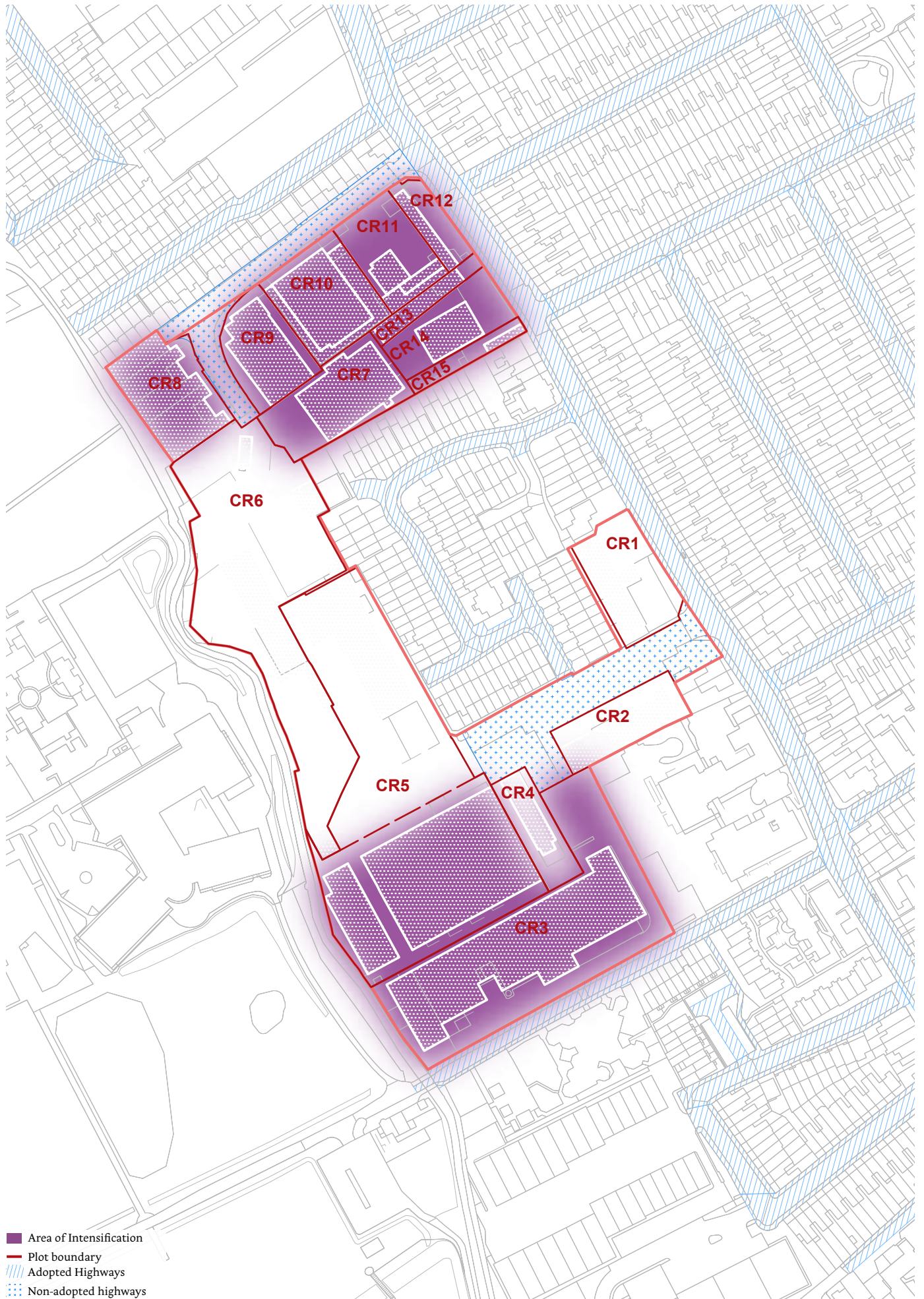
Plot_ID	CR7	CR8	CR9	CR11	CR12	Grand Total	
Plot Area	2,370	2,214	1,835	1,780	801	48,963	
Footprint	1,356	1,916	1,194	325	286	21,996	
Plot Coverage %	57%	87%	65%	18%	36%		
VOA Data	Total Properties	1	2	1		90	
	Basement	-	-	-			
	Ground Floor	1,191	654	1,132		17,827	
	First Floor	-	133	132		1,492	
	Second Floor	-	-	-		1,051	
	Mezzanine	-	81	996		4,790	
	Operational business space	-	-	-		918	
	Yard	-	-	-		243	
	Car Parks	92	12	115		1,670	
	Total Area	1,283	879	2,375	Plot without data	Plot without data	27,992
	Floorspace	1,191	787	1,264			20,370
OS Mapping Measurement	1356	2096		566	572	6,334	
Costar Data	0			0	0	1,811	
Egi Data	0			0	0	-	
Plot Ratio %	59%	98%	71%	33%	74%		
TOTAL Built Floorspace	1,356	2,096	1,264	566	572	23,956	
TOTAL Area	1,356	2,096	2,375	566	572	31,370	



3.7 BEA SITES - PLOT RATIO AND UPLIFTS

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
BEA 6	Church Road					

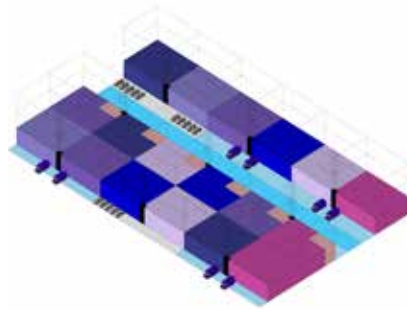
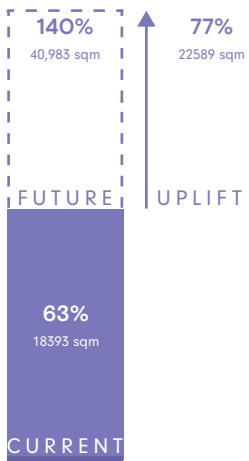


3.7 BEA SITES – PLOT RATIO AND UPLIFTS

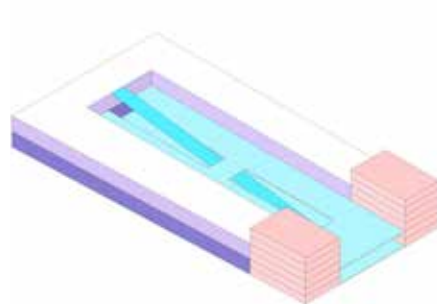
Potential intensification

BEA 6 OPTIONS		1		
		Co-location Development		
Current Condition	Plot IDs	CR7+CR8+CR9+CR10+CR11+CR12+CR13+CR14+CR15	CR3+CR5 Partially	
	Plot Area	14,078	15,096	29,174
	Plot Ratio	74%	53%	63%
	Built Floorspace	10,387	8,006	18,393
Potential Uplift	Typology	B	F	
	Potential Plot Ratio	156%	126%	140%
	Future Built Floorspace	21,961	19,021	40,983
	Built Floorspace Uplift sqm	11,574	11,015	22,589
	Potential Increase in Plot Ratio	82%	73%	77%

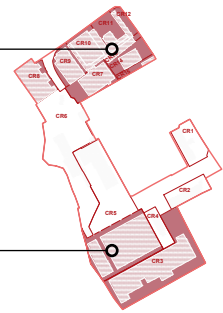
Scenario 1: Industrial Intensification & Employment Co-location



Typology B: Shared Yard
 • Plot Ratio: 156%



Typology F: Co-location
 • Plot Ratio: 126%



- Area of Intensification
- Access
- Plots boundary

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 12 JUSTIN ROAD/TRINITY WAY

Plot_ID	JR1	JR4	JR2	JR3	Grand Total	
Plot Area	11,758	5,364	11,664	3,304	32,089	
Footprint	3,513	2,515	3,428	1,368	10,823	
Plot Coverage %	30%	47%	29%	41%		
VOA Data	Total Properties				-	
	Basement	-	-	-	-	
	Ground Floor	2,614	1,696	2,915	1,010	8,235
	First Floor	2,776	604	306	122	3,808
	Second Floor	-	-	-	-	-
	Mezzanine	71	42	-	-	113
	Operational business space	-	672	156	226	1,054
	Yard	-	-	1,551	242	1,793
	Car Parks	1,467	472	1,382	138	3,460
	Total Area	6,929	3,487	6,311	1,738	18,464
	Floorspace	5,390	2,301	3,221	1,132	12,044
OS Mapping Measurement						
Costar Data						
Egi Data						
Plot Ratio %	47%	44%	28%	35%		
TOTAL Built Floorspace	5,390	2,301	3,221	1,132	12,044	
TOTAL Area	6,929	3,487	6,311	1,738	18,464	



3.7 BEA SITES - PLOT RATIO AND UPLIFTS

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
BEA 12	Justin Road/ Trinity Way					



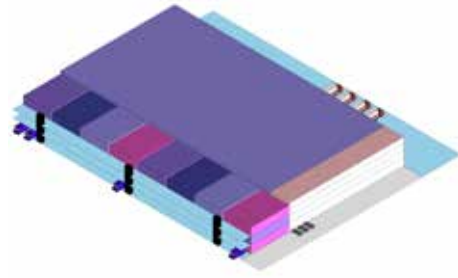
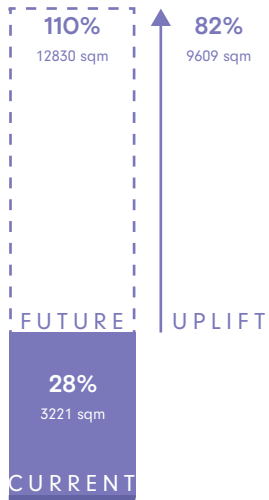
- Area of Intensification
- Plot boundary
- ▨ Adopted Highways
- ▨ Non-adopted highways

3.7 BEA SITES – PLOT RATIO AND UPLIFTS

Potential intensification

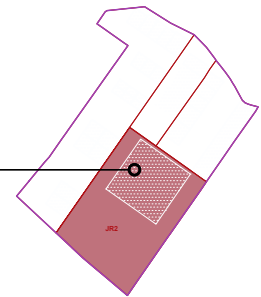
BEA 12 OPTIONS		1	2
			Attached structure to existing industries
Current Condition	Plot IDs	JR2	JR2
	Plot Area	11,664	11,664
	Plot Ratio	28%	28%
	Built Floorspace	3,221	3,221
Potential Uplift	Typology	C	A
	Potential Plot Ratio	110%	200%
	Future Built Floorspace	12,830	23,327
	Built Floorspace Uplift sqm	9,609	20,106
	Potential Increase in Plot Ratio	82%	172%

Scenario 1: Intensification development of JR2 site /Retaining Existing Big Box and Attached Structure

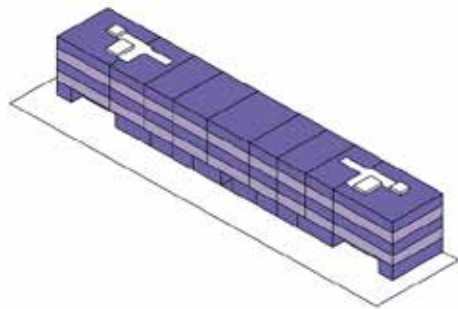
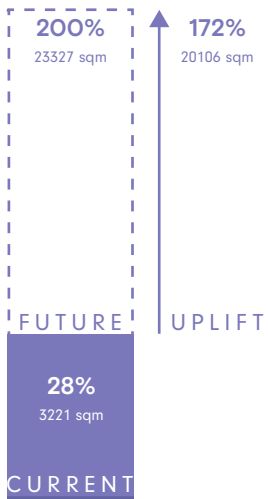


Typology C: Attached Structure

- Plot Ratio:110%



Scenario 2: Industrial Intensification with Stacked Industry Building



Typology A: Industrial Building

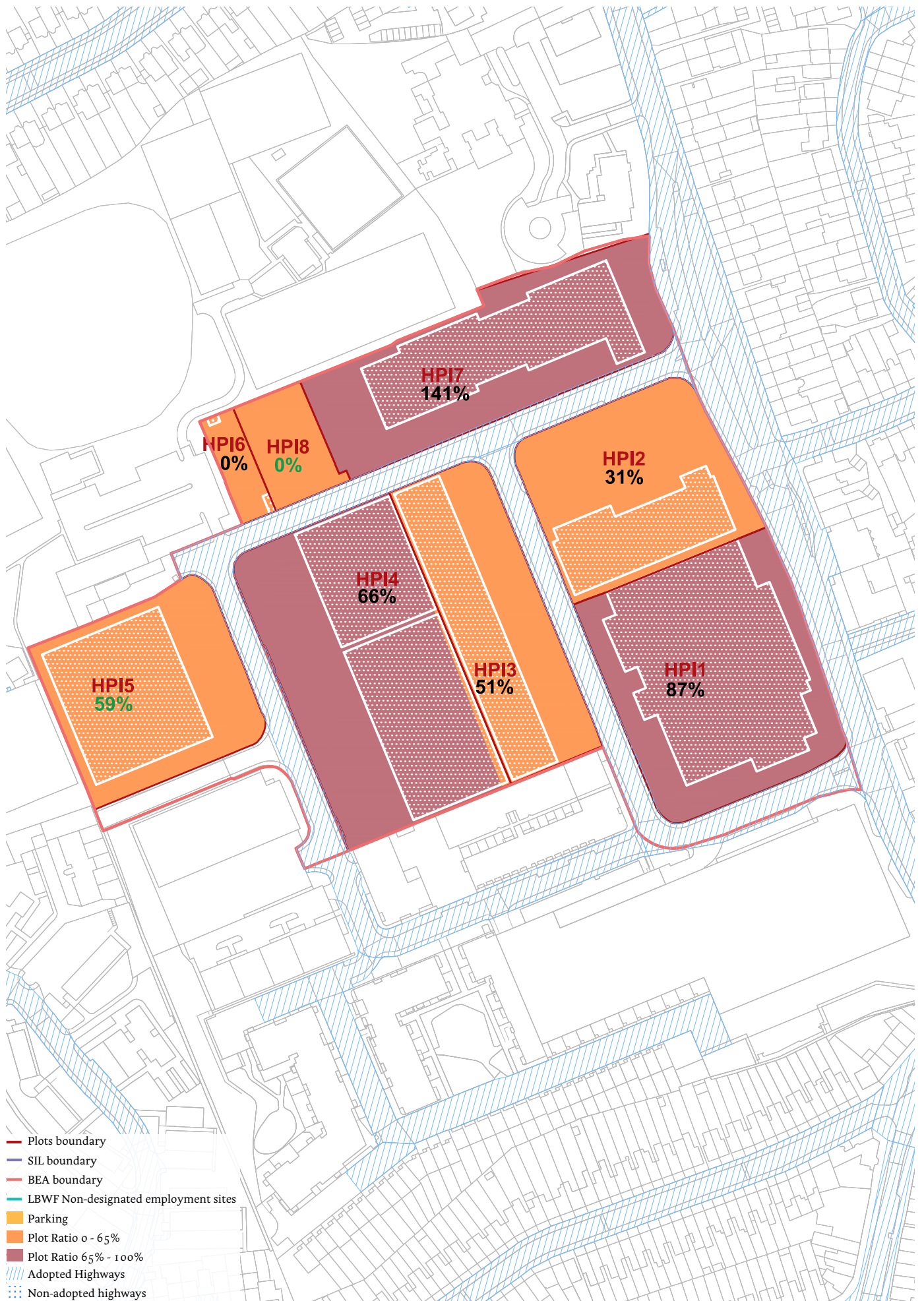
- Plot Ratio:200%

- Area of Intensification
- ➔ Access
- Plots boundary

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 13 HIGHAMS PAR

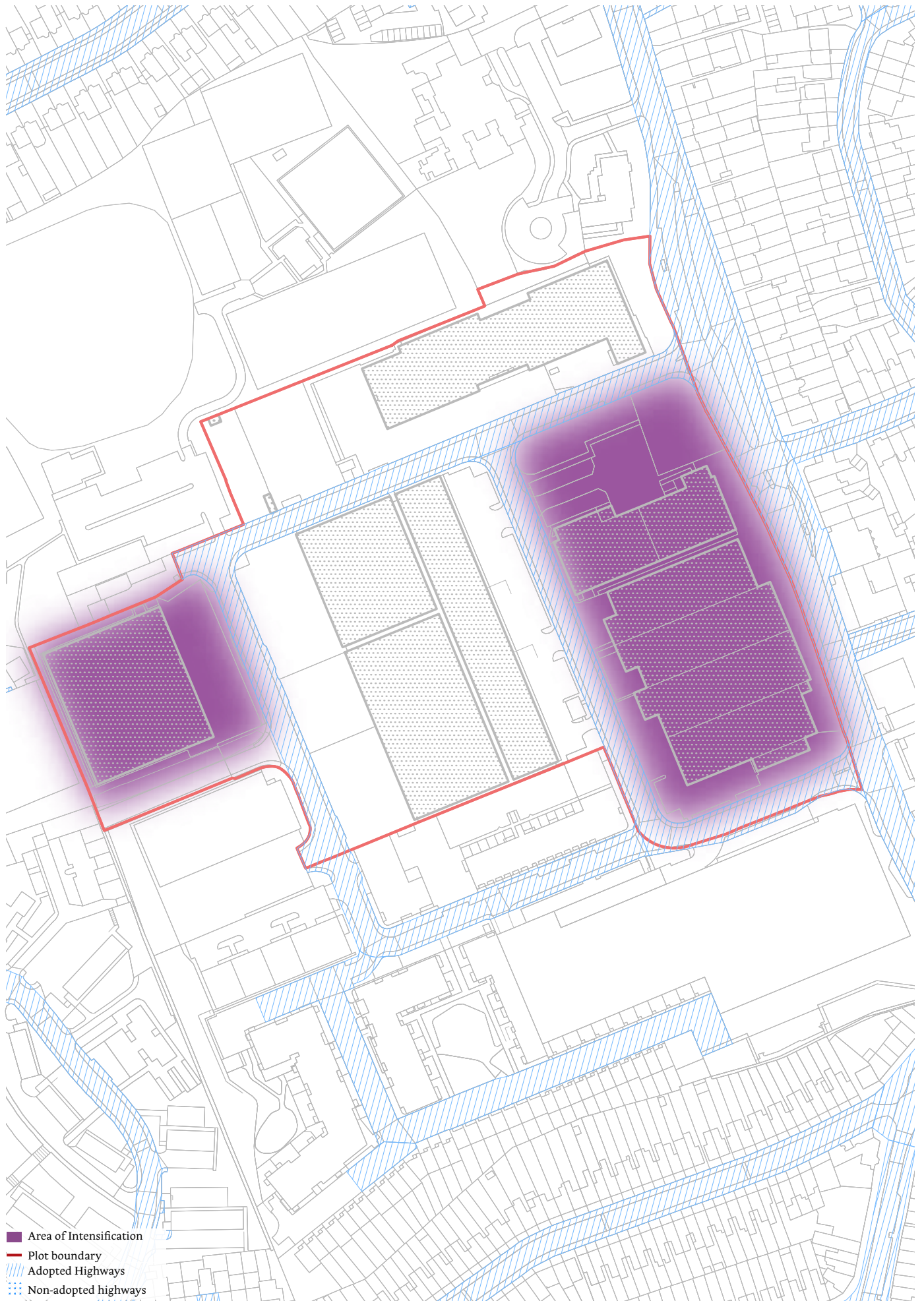
Plot_ID	HPI7	HPI6	HPI3	HPI2	HPI1	HPI4	HPI8	HPI5	Grand Total	
Plot Area	7,839	745	5,844	6,447	9,263	10,250	1,507	6,225	48,119	
Footprint	3,561	40	2,784	2,058	6,124	5,728	-	3,300	23,595	
Plot Coverage %	45%	5%	48%	32%	66%	56%	0%	53%		
VOA Data	Total Properties	1	1	6	2	4			14	
	Basement	-	-	-	-	-			-	
	Ground Floor	3,561	-	2,766	1,937	4,350			12,614	
	First Floor	3,561	-	136	-	276			3,974	
	Second Floor	3,561	-	-	-	-			3,561	
	Mezzanine	-	-	-	135	117			252	
	Operational business space	-	1,040	-	-	-			1,040	
	Yard	-	-	-	-	-			-	
	Car Parks	-	-	138	276	288			703	
	Total Area	10,684	1,040	3,040	2,348	5,032	No data	No data	No data	22,145
	Floorspace	10,684	-	2,902	1,937	4,627				20,150
OS Mapping Measurement					6,294		-	3,659	9,953	
Costar Data					7,815	6,599	-	-	14,414	
Egi Data					1,526	-	-	-	1,526	
Plot Ratio %	141%	0%	51%	31%	87%	66%	0%	61%		
TOTAL Built Floorspace	10,684	-	2,902	1,937	7,815	6,599	-	3,659	33,597	
TOTAL Area	10,684	1,040	3,040	2,348	7,815	6,599	-	3,659	35,186	



3.7 BEA SITES - PLOT RATIO AND UPLIFTS

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
BEA 13	Highams Park					

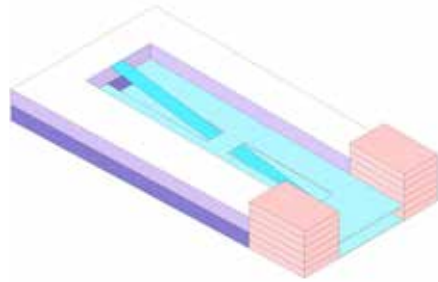


3.7 BEA SITES – PLOT RATIO AND UPLIFTS

Potential intensification

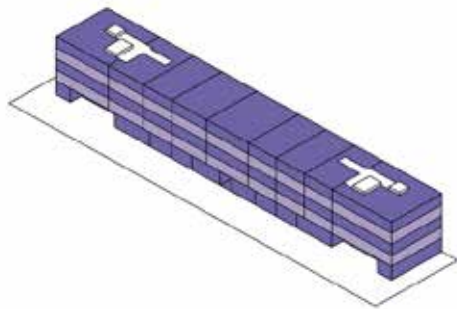
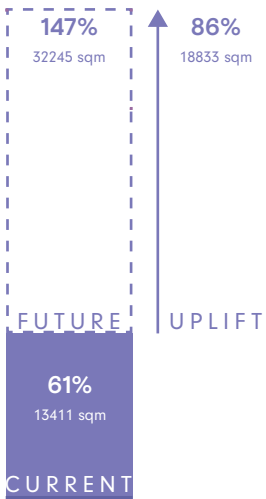
BEA 13 OPTIONS		1		
		Co-location Development		
Current Condition	Plot IDs	HPI ₅	HPI ₁ +HPI ₂	
	Plot Area	6,225	15,711	21,935
	Plot Ratio	59%	62%	61%
	Built Floorspace	3,659	9,752	13,411
Potential Uplift	Typology	A	F	
	Potential Plot Ratio	200%	126%	147%
	Future Built Floorspace	12,449	19,795	32,245
	Built Floorspace Uplift sqm	8,790	10,043	18,833
	Potential Increase in Plot Ratio	141%	64%	86%

Scenario 1: Industrial Intensification & Employment Co-location



Typology F: Co-location

- Plot Ratio: 126%



Typology A: Industrial Building

- Plot Ratio: 200%

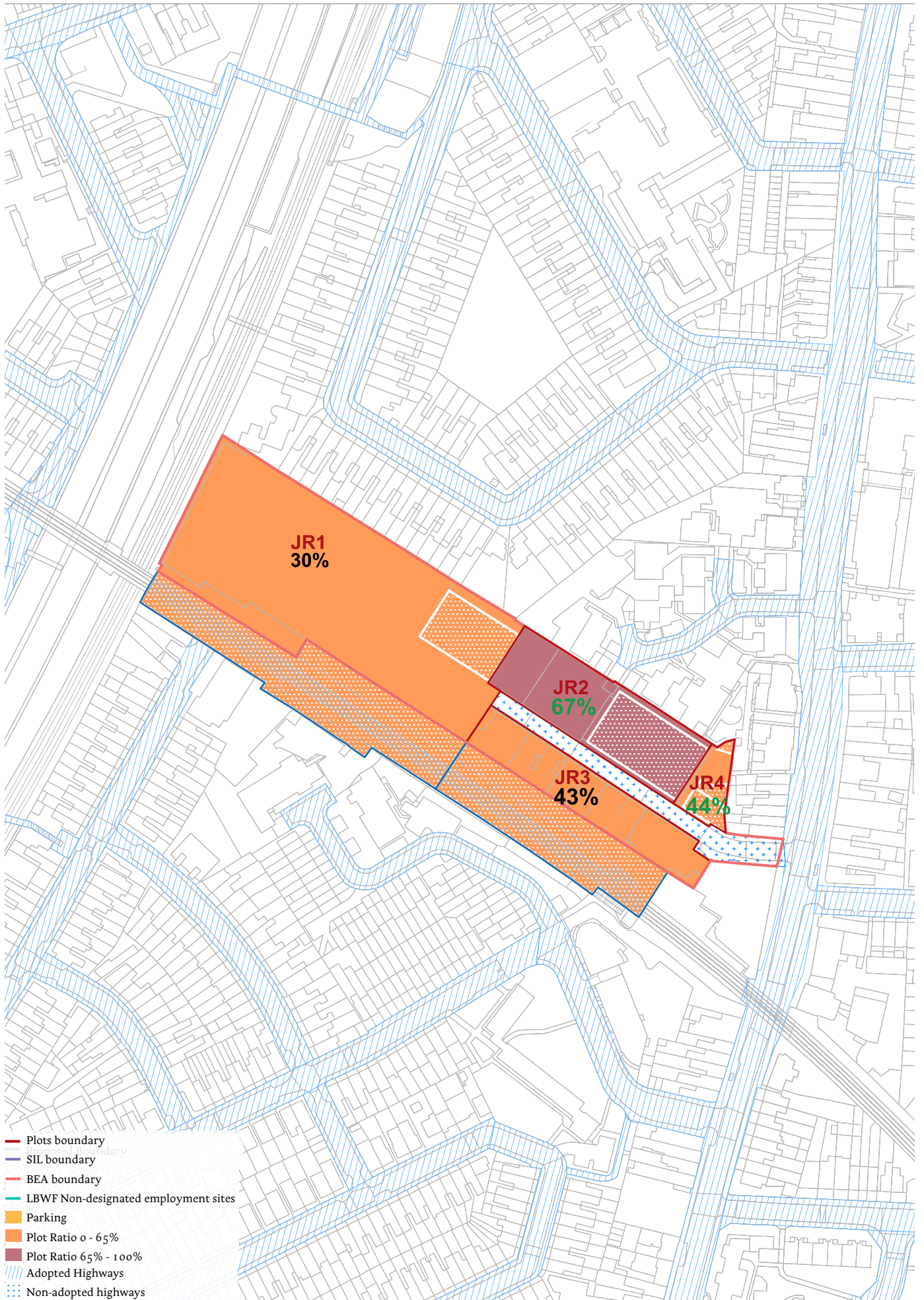


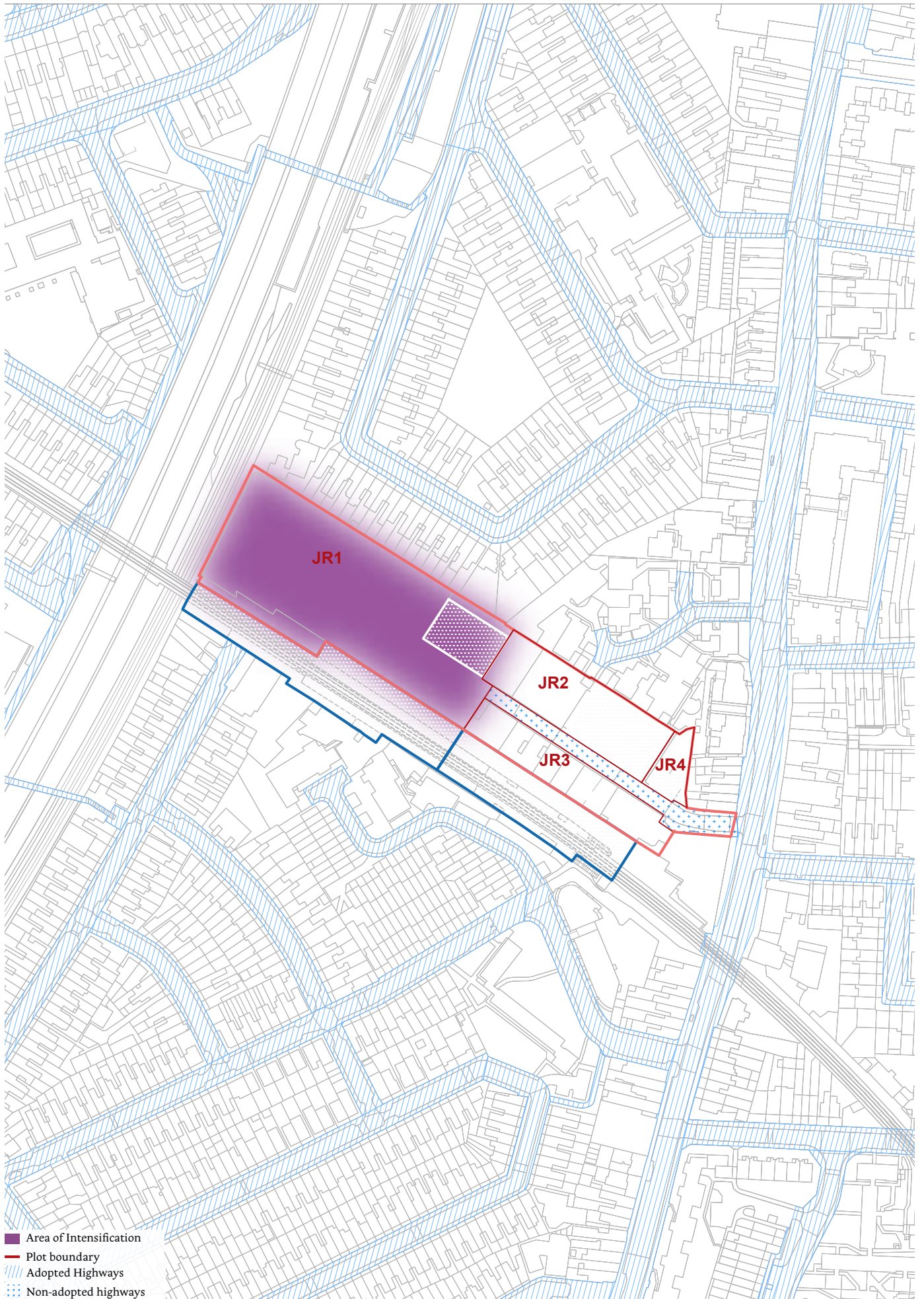
- Area of Intensification
- ➔ Access
- Plots boundary

3.7 BEA SITES – PLOT RATIO AND UPLIFTS

BEA 17 JOSEPH RAY ROAD

Plot_ID	JR1	JR2	JR3	JR4	JR5	Grand Total	
Plot Area	12,540	2,881	4,671	570	1,243	21,905	
Footprint	4,176	1,189	2,506	249	963	9,084	
Plot Coverage %	33%	41%	54%	44%	77%		
VOA Data	Total Properties	1	1	10	1	2	15
	Basement	-	-	-	-	-	-
	Ground Floor	3,630	1,116	1,960	114	279	7,097
	First Floor	-	234	-	-	-	234
	Second Floor	-	-	-	-	-	-
	Mezzanine	170	-	-	-	43	213
	Operational business space	7,106	-	890	-	-	7,997
	Yard	160	-	256	-	-	416
	Car Parks	196	207	-	-	-	403
	Total Area	11,261	1,557	3,107	114	322	16,360
	Floorspace	3,630	1,350	1,960	114	279	7,331
OS Mapping Measurement		1,924		249		2,173	
Costar Data		-		-			
Egi Data		-		-			
Plot Ratio %	30%	69%	43%	45%	23%		
TOTAL Built Floorspace	3,630	1,924	1,960	249	279	8,041	
TOTAL Area	11,261	1,924	3,107	249	322	16,863	





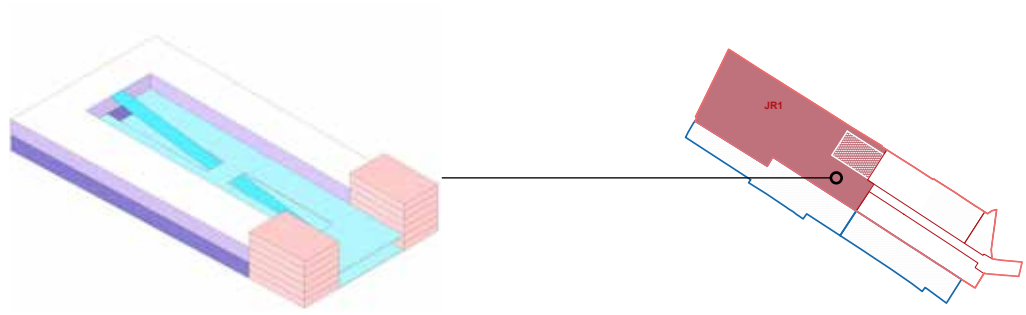
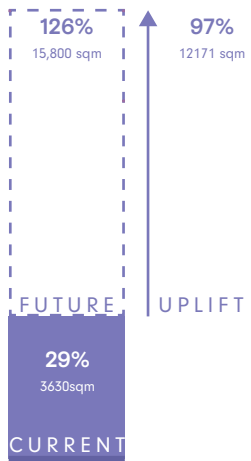
- Area of Intensification
- Plot boundary
- ▨ Adopted Highways
- ⋯ Non-adopted highways

3.7 BEA SITES – PLOT RATIO AND UPLIFTS

Potential intensification

BEA 17 OPTIONS		1
		Employment Co-location
Current Condition	Plot IDs	JR1
	Plot Area	12,540
	Plot Ratio	29%
	Built Floorspace	3,630
Potential Uplift	Typology	F
	Potential Plot Ratio	126%
	Future Built Floorspace	15,800
	Built Floorspace Uplift sqm	12,171
	Potential Increase in Plot Ratio	97%

Scenario 1:



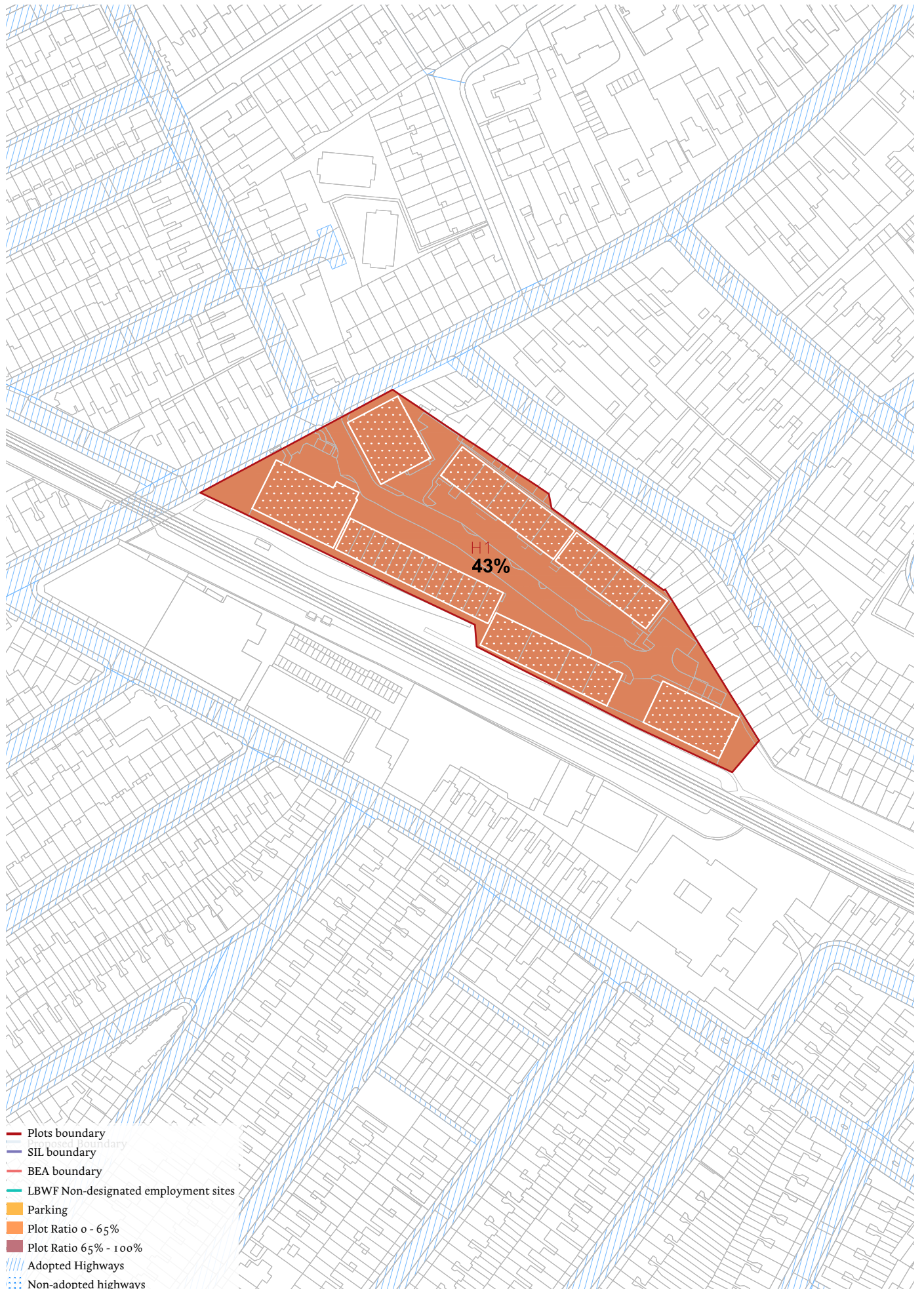
Typology F: Co-location
• Plot Ratio: 126%

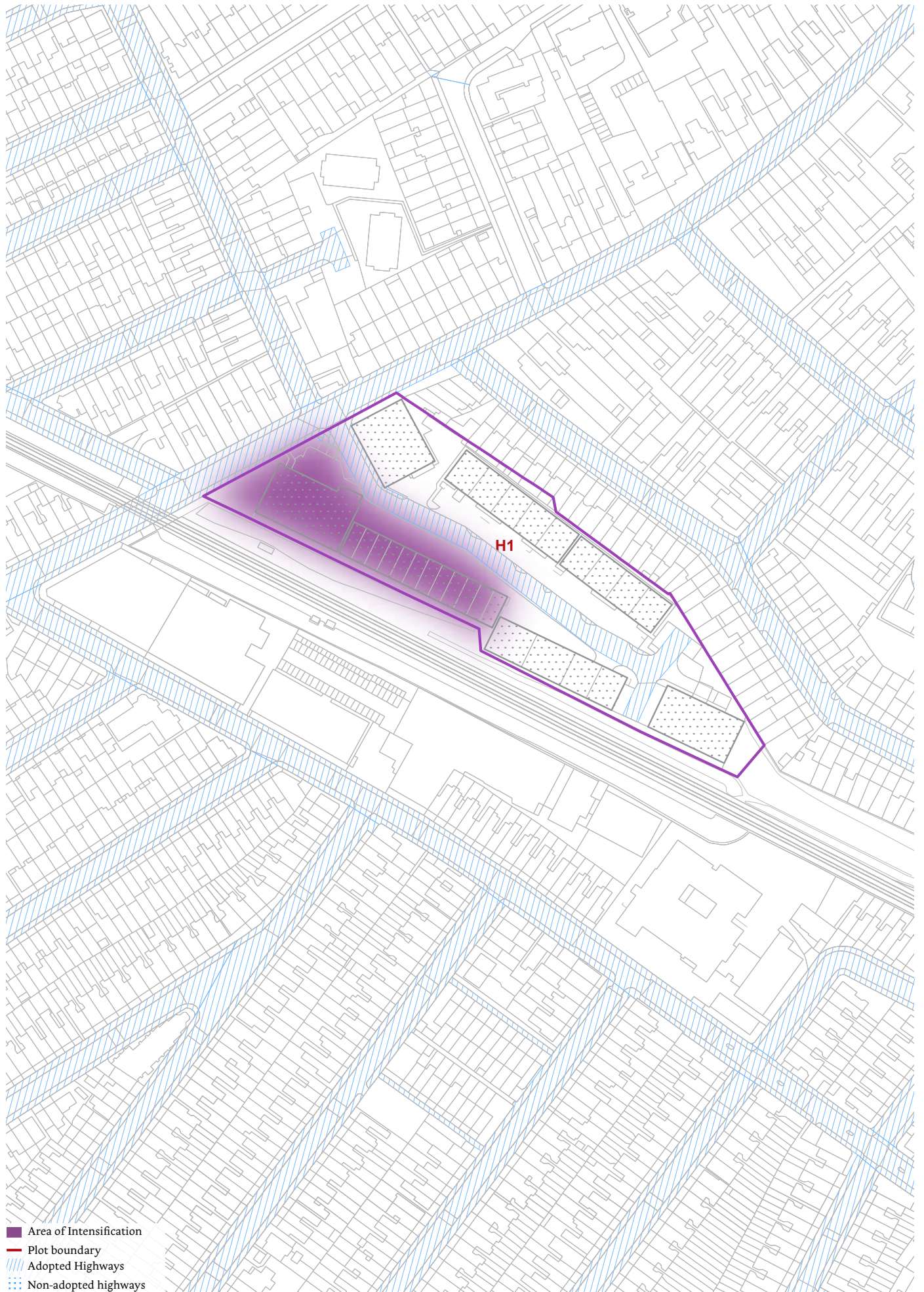
- Area of Intensification
- ➔ Access
- Plots boundary

3.7 BEA SITES - PLOT RATIO AND UPLIFTS

BEA 18 HAINAULT

Plot_ID	H1	Grand Total
Plot Area	14,458	14,458
Footprint	6,204	6,204
Plot Coverage %	43%	
VOA Data	Total Properties	-
	Basement	-
	Ground Floor	5,307
	First Floor	663
	Second Floor	-
	Mezzanine	110
	Operational business space	628
	Yard	49
	Car Parks	611
	Total Area	7,368
	Floorspace	5,970
OS Mapping Measurement		
Costar Data		
Egi Data		
Plot Ratio %	43%	
TOTAL Built Floorspace	5,970	5,970
TOTAL Area	7,368	7,368



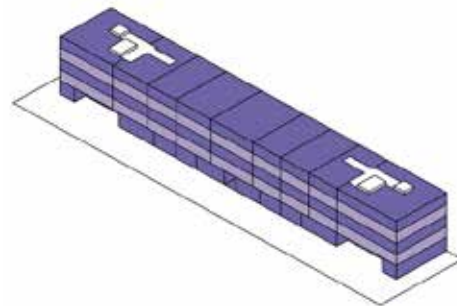
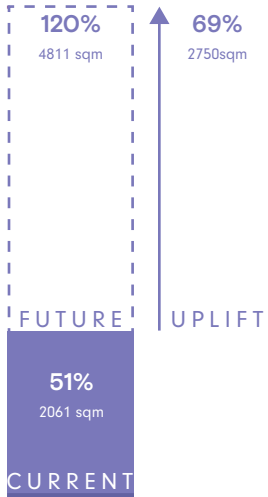


3.7 BEA SITES – PLOT RATIO AND UPLIFTS

Potential intensification

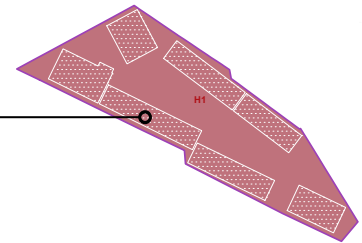
BEA 18 OPTIONS		1	2
		Whole site redevelopment: 3 floors	Whole site redevelopment: 5 floors
Current Condition	Plot IDs	H1	H1
	Plot Area	4,009	4,009
	Plot Ratio	51%	51%
	Built Floorspace	2,061	2,061
Potential Uplift	Typology	A	A
	Potential Plot Ratio	120%	200%
	Future Built Floorspace	4,811	8,018
	Built Floorspace Uplift sqm	2,750	5,957
	Potential Increase in Plot Ratio	69%	149%

Scenario 1: Industrial Intensification with Stacked Industry Building - 3 Storeys

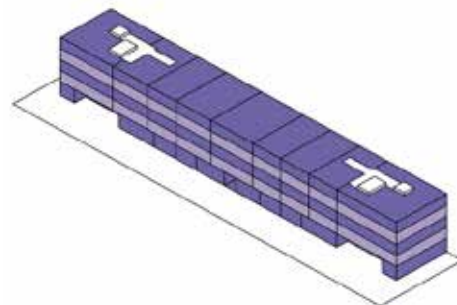
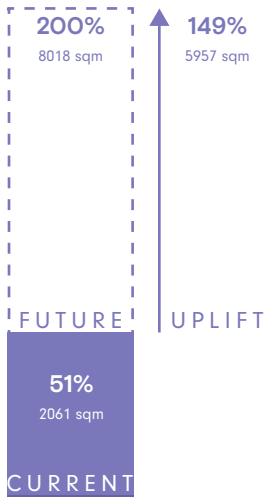


Typology A: Industrial Building

- Plot Ratio: 120%



Scenario 2: Industrial Intensification with Stacked Industry Building - 5 Storeys



Typology A: Industrial Building

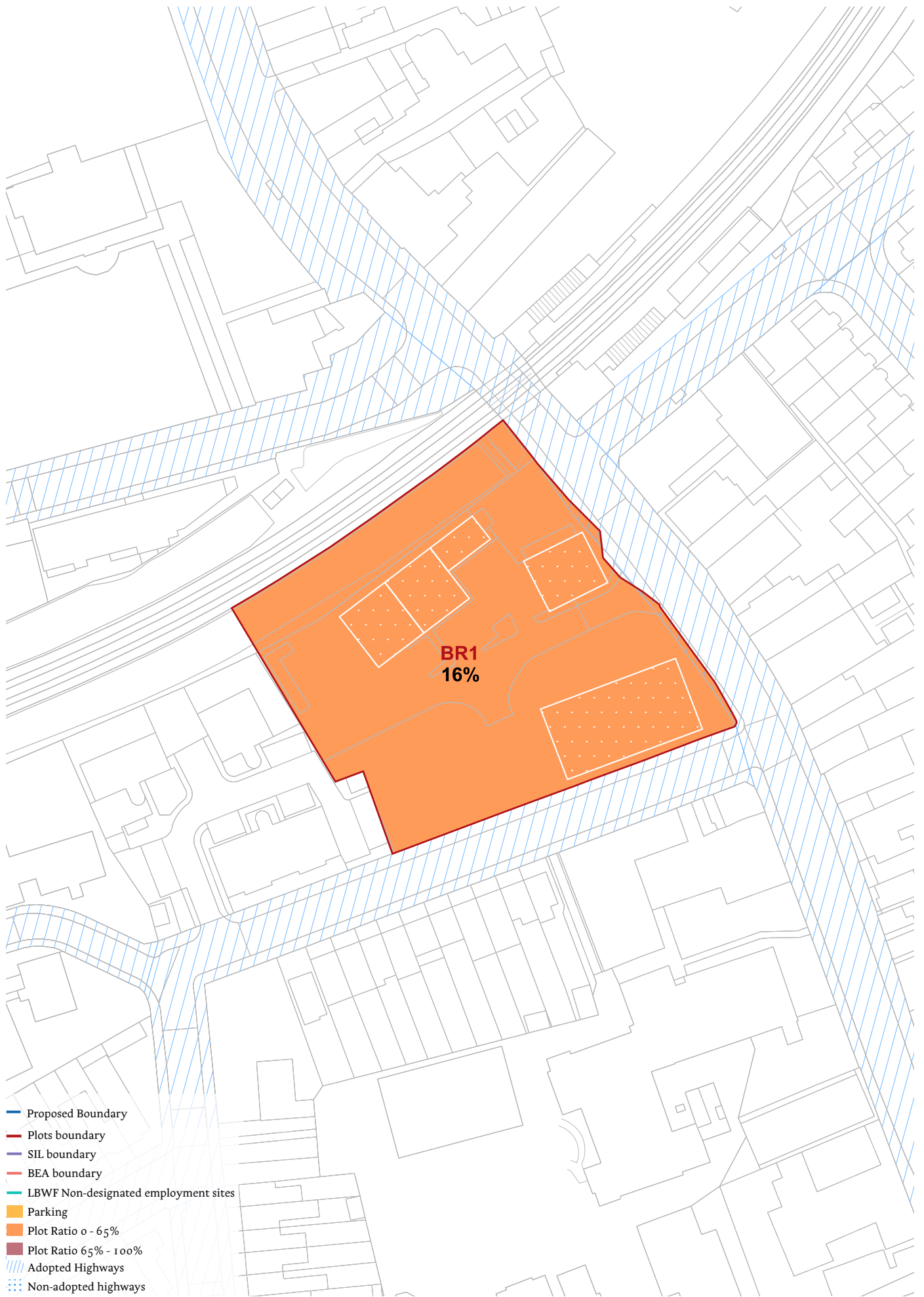
- Plot Ratio: 200%

- Area of Intensification
- ➔ Access
- Plots boundary

3.7 BEA SITES – PLOT RATIO AND UPLIFTS

BEA 22 BARRETT ROAD

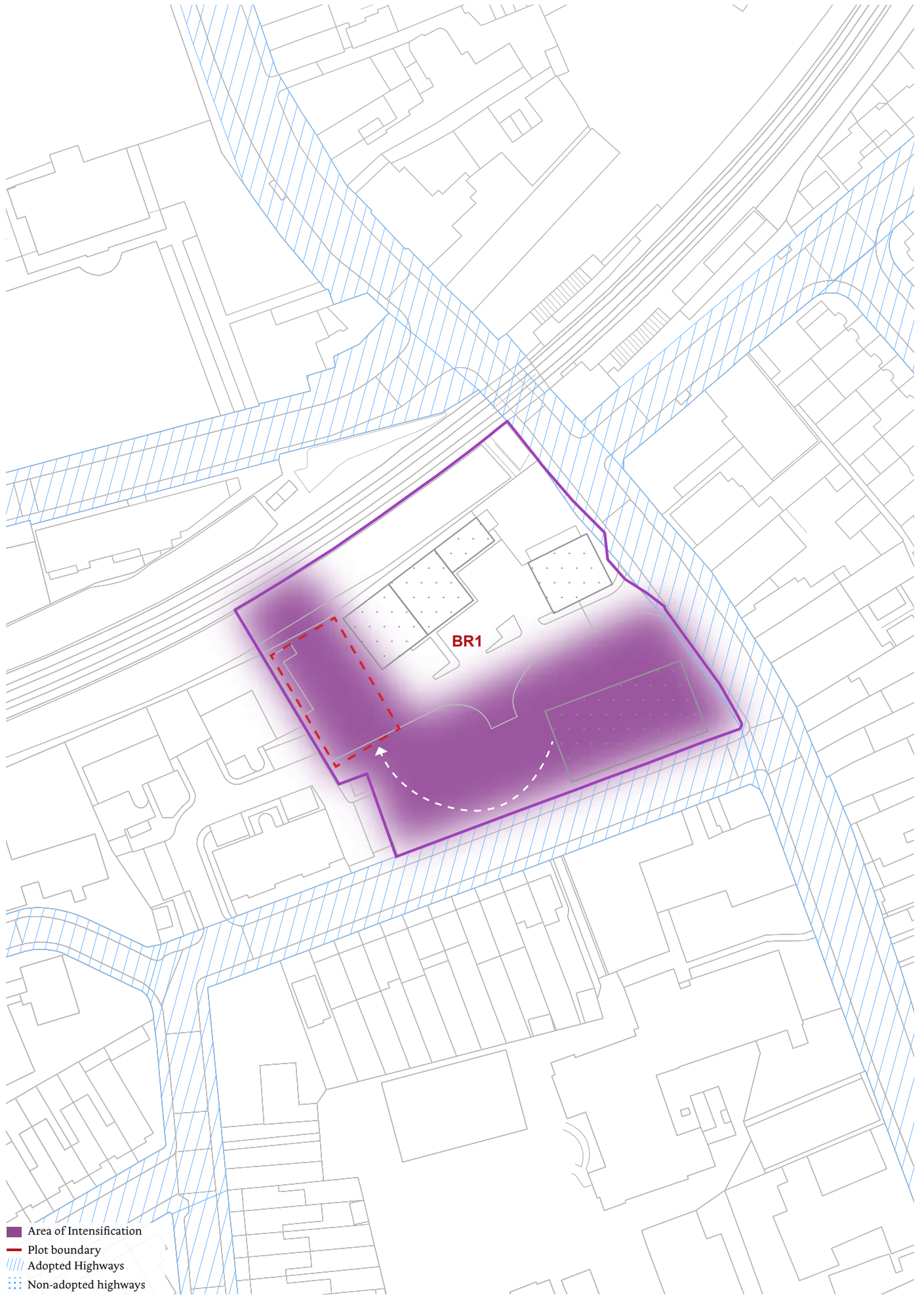
Plot_ID	BR1	Grand Total
Plot Area	5,463	5,463
Footprint	1,098	1,098
Plot Coverage %	20%	
VOA Data	Total Properties	-
	Basement	-
	Ground Floor	716
	First Floor	140
	Second Floor	-
	Mezzanine	-
	Operational business space	283
	Yard	2,001
	Car Parks	115
	Total Area	3,255
	Floorspace	856
OS Mapping Measurement		
Costar Data		
Egi Data		
Plot Ratio %	16%	
TOTAL Built Floorspace	856	856
TOTAL Area	3,255	3,255



3.7 BEA SITES - PLOT RATIO AND UPLIFTS

Areas for intensification

Site Name		Nature and extent of ownership consolidation	Condition of existing stock	Utilisation of land and sites	Ability to co-locate business activities	Limitations to servicing increased activity
BEA 22	Barrett Road	■■■■■■■■■■	■■■■■■■■■■	■■■■■■■■■■	■■■■■■■■■■	■■■■■■■■■■



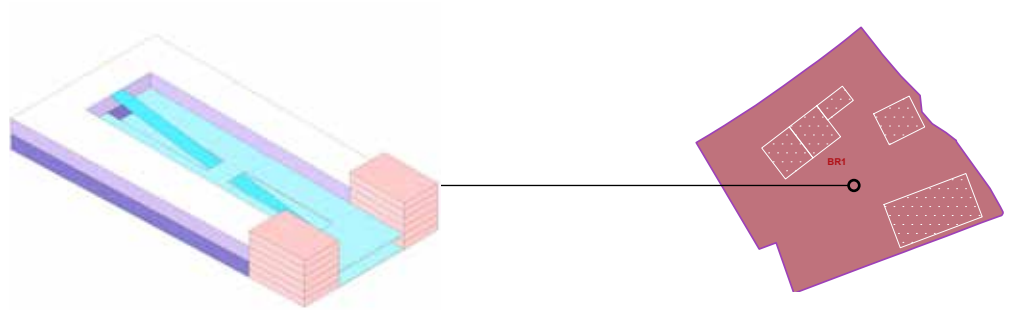
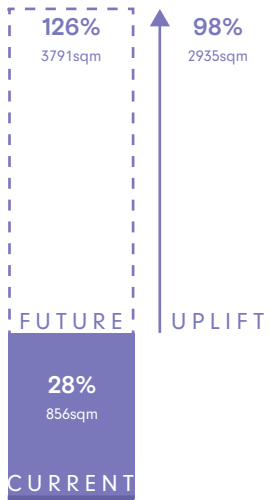
- Area of Intensification
- - - Plot boundary
- /// Adopted Highways
- ... Non-adopted highways

3.7 BEA SITES – PLOT RATIO AND UPLIFTS

Potential intensification

BEA 22 OPTIONS		1
		Whole site redevelopment
Current Condition	Plot IDs	BR1
	Plot Area	3,009
	Plot Ratio	28%
	Built Floorspace	856
Potential Uplift	Typology	F
	Potential Plot Ratio	126%
	Future Built Floorspace	3,791
	Built Floorspace Uplift sqm	2,935
	Potential Increase in Plot Ratio	98%

Scenario 1: Industrial Intensification & Employment Co-location

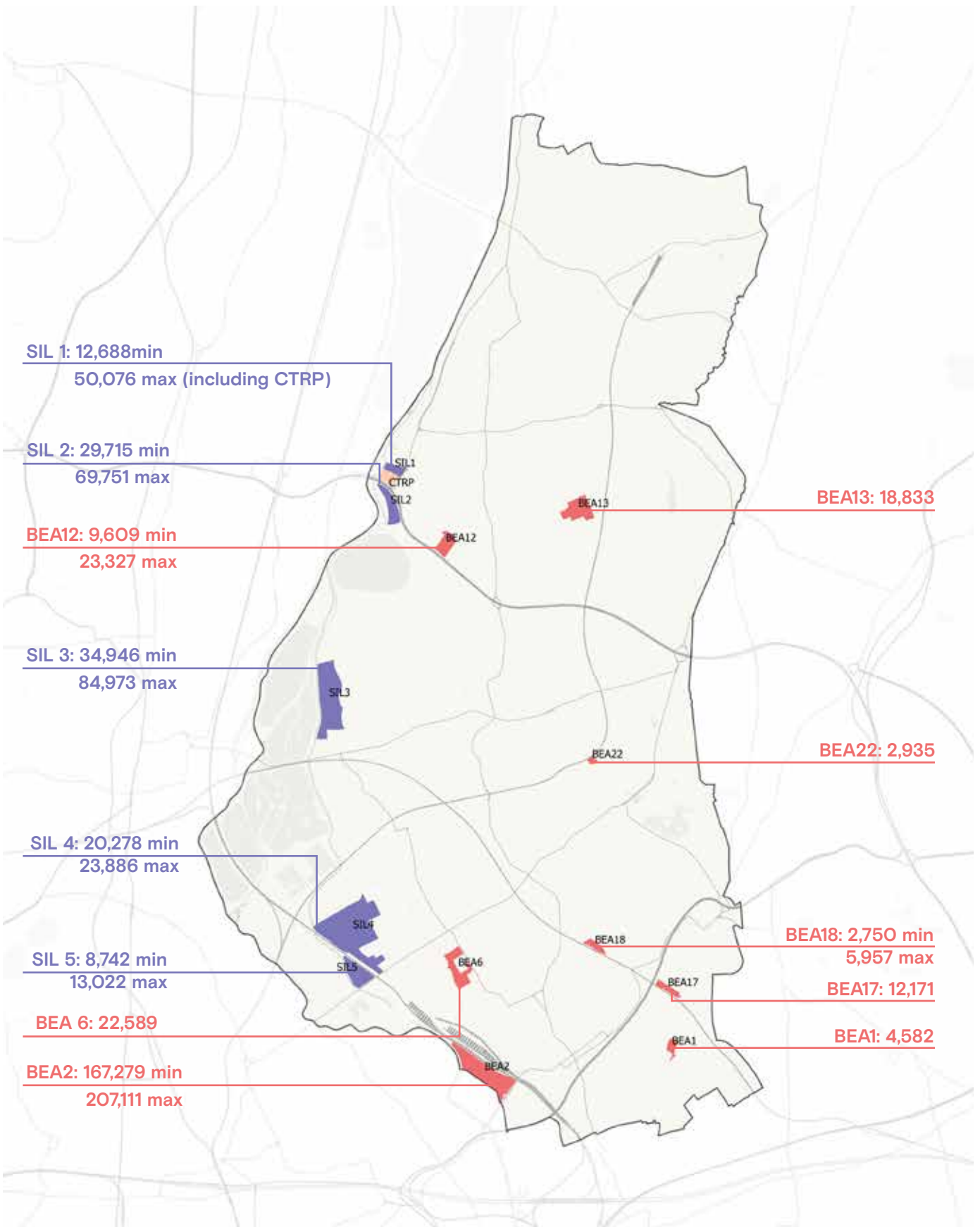


Typology F: Co-location

- Plot Ratio: 126%

3.8 SITES FOR INTENSIFICATION

Policy Designation	Site Location	Report Total Area	Report Built Floorspace	Uplifts Min	Uplifts Max
SIL					
SIL1	Hall Lane	9,779	8,483	12,688	50,076
SIL2	North Circular Road	37,113	20,335	29,715	69,751
SIL3	Blackhorse Lane	99,434	80,979	34,946	84,973
SIL4	Argall Avenue	157,835	127,541	20,278	23,886
SIL5	Rigg Approach	33,297	29,581	8,742	13,022
SIL6	Lammas Road	14,080	12,570		
SIL7	Orient Way	17,681	16,037		
BEA					
BEA1	Howard Road	8,028	6,143	4,582	4,582
BEA2	Sherrin Road	25,488	20,497	167,279	207,111
BEA3	Auckland Road	33,164	33,164		
BEA5	Etloe Road/Simonds Road	4,986	3,252		
BEA6	Church Road	30,943	23,529	22,589	22,589
BEA7	Heybridge Way	8,952	7,484		
BEA8+Extension(SIL4)	Argall Avenue Extension	16,317	14,803		
BEA9	Sutherland Road	2,780	2,281		
BEA10	Clifford Road	1,093	1,043		
BEA11	Waltham Park Way	13,491	10,280		
BEA12	Justin Road/Trinity Way	18,464	12,044	9,609	23,327
BEA13	Highams Park Industrial Estate	35,186	33,597	18,833	18,833
BEA14	Montague Road/Courtenay Road Arches	3,137	1,511		
BEA15	Temple Mills Lane	4,135	4,135		
BEA16	Cabinet Way	13,129	7,802		
BEA17	Joseph Ray Road	16,863	8,041	12,171	12,171
BEA18	Hainault Road	7,368	5,970	2,750	5,957
BEA19	Hatherley Mews	1,458	1,396		
BEA20	Lancaster Road Arches	2,916	1,724		
BEA21	East London Office Centre	717	717		
BEA22	Barrett Road	3,255	856	2,935	2,935
BEA23	E10 Business Centre	1,603	1,603		
Non-Designated					
LBWF7	Norlington Road	12,847	11,247		
LBWF9	Crownlea	2,350	2,027		
LBWF11	Shaftesbury Court	1,677	957		
LBWF22	Ravenswood Industrial Estate	1,258	1,222		
LBWF36	Skeltons Lane	7,538	6,014		



■ Strategic Industrial Land
■ Borough Employment Area

4. STRATEGIC CONSIDERATIONS

4.1 STRATEGIC CONSIDERATIONS

CONSIDERATIONS & RECOMMENDATIONS

The objective of this study has been to identify the potential additional floorspace capacity that could be accommodated within the borough's existing employment sites should they offer the appropriate conditions for more intensive forms of development to come forward.

The overall findings suggest that should every opportunity identified within the study come forward to its 'maximum' employment potential the borough could accommodate over 500,000sqm of additional employment space within designated and non-designated sites. This is significantly higher than the projected total employment space requirement as set out in the Employment Land Study Update, which indicated 52,000sqm of B Class space was required of which over 30,000sqm was needed to service industrial/distribution needs.

Delivery Considerations

The most significant uplift in floorspace can be delivered within some of the larger designated sites where there is currently a low utilisation rate, including BEA2 Sherrin Road (more commonly known as New Spitalfields Market); SIL 1 Hall Lane and SIL 2 North Circular Road aligned to the North Circular itself; and SIL 4 Argall Avenue and SIL 5 Rigg Approach at Lea Bridge.

Whilst these sites provide significant potential capacity there are some strategic considerations that need to be borne in mind before a strategy is set for future land provision in the borough.

Promoting Diversity in the Land Portfolio

One of the key strengths of the borough's economy is its diversity, it incorporates a range of business sectors across a wide range of locations and site types. The borough's success in attracting and growing SMEs in new sectors has been a particular beneficiary of this stock diversity.

However, if the 'biggest' opportunities form the core basis of the future land strategy there is a risk that this diversity becomes eroded, and the environments for businesses in the future will become less suitable for accommodating the range of business activity that exists today and is likely to exist in the future.

Ultimately the borough would trade a mix of large and small sites, with corresponding ranges of property types and sizes for a narrower range of sites that would deliver similar working environments and most likely be orientated to a smaller range of sectors and activities. As such it would not fully support the borough in achieving its economic objectives.

Reliance on Unproven Typologies

As the example typologies used within the study show, whilst intensified industrial typologies are common across the globe, they remain an unproven approach to accommodating industrial business in the UK. Whilst in London this is beginning to change, as many major developer/investors are developing stacked typologies, there remain no modern examples that have been delivered.

In some London locations the likes of Prologis and SEGRO in particular have expressed interest in delivering stacked industrial, and indeed are bringing sites forward, there is still significant reservations within the business community. Initial business engagement as part of the Lea Bridge Gateway masterplan revealed most businesses could not see how an upper floor space would work for them.

Therefore, whilst there is certainly the potential to deliver multi-storey industrial in Waltham Forest given the nature of demand, value sets and the scale of the industrial land it cannot at present be relied upon as a strategy to meet all of the borough's future employment space needs.

Quantum and Pace of Delivery

The use of intensified industrial typologies will allow the borough to make much more efficient use of its limited land resources, which in turn can support the delivery of both economic and other growth needs over the plan period.

However the sequencing of delivery requires consideration to understand how such typologies relate to the ability for the market to absorb the quantum of space provided. As shown in this study some typologies have the ability to deliver a considerable quantum of space, equivalent to that usually provided in a traditional industrial estate.

Unlike a traditional ground floor estate the intensified typology cannot be phased as it is a single large building rather than a series of smaller units, as such there may be market limitations to the scale and pace of delivery. Developers may view releasing a significant quantum of space in one go a significant

risk if demand is not proven for that typology, creating viability issues as values are affected. This risk may be exacerbated if similar schemes are brought forward at the same time in other parts of the Upper Lee Valley.

Sustainable Economic Growth

From a spatial perspective, given the proximity of the sites to one another, this would create a large industrial cluster in Waltham Forest situated along the North Circular. By doing so and releasing smaller sites for other uses, this could negatively impact the health and survival of SMEs.

Many SMEs rely on secondary employment space, often of a more affordable nature, close to town centres with good public transport links. Whilst it may be that there is strong demand from occupiers for industrial locations with a good strategic Road Network, it is not the priority for all businesses who may e.g. wish to be closer to amenities or their consumer base. To ensure that Waltham Forest retains its diverse range of businesses – the protection of these spaces is paramount.

The current dispersed portfolio of sites allows for the economy across the borough to support more sustainable patterns of living and working, with many employment sites close to places people live, or easily accessible by bike/foot from residential areas. A focus solely on the large SIL sites would erode this positive attribute, increasing reliance on longer commutes (most likely by car) for people who live and work in the borough.

Transport and Access

Delivering additional industrial capacity will have an impact on the road network. An increase in vehicle movement from businesses may not be able to be accommodated in the existing road network, particularly if the roads are shared with neighbouring uses. It is advised a more detailed transport study is considered to understand any upper limits on industrial development in target sites as this may temper the potential opportunity.

The movement towards more sustainable modes of transport, propelled by the Covid-19 pandemic, identifies that there is a need to consider the ability to support active travel network across the industrial clusters. This falls outside the scope of this study, but we recognise that this needs to be further investigated to ensure that the employment spaces are in line with wider borough objectives.

Recommendation Strategies

Based on the detailed analysis undertaken in this study, the identified land requirements set out in the Employment Land Study and the delivery considerations outlined above, we would suggest the following strategies are considered for the borough's employment land.

Industrial Intensification

These sites should be the focus of industrial intensification within the borough to make the most of the strategic land assets, connectivity and strong market context within which they sit. Successful intensification, in locations with the right attributes, could enable some parts of the site to be used for other forms of development

Designation	Site Name
SIL 1	Hall Lane
SIL 2	North Circular Road
SIL 3	Blackhorse Lane
SIL 4	Argall Avenue
SIL 5	Rigg Approach
BEA2	Sherrin Road
-	Cork Tree Retail Park

It should be noted that both SIL 4 and SIL 5 are included, based on the Stage 1 recommendations of the Lea Bridge Gateway Masterplan.

Intensification to Accommodate Other Employment Activity

These sites offer opportunities to provide viable locations for both industrial and other business activity. They benefit from good access via public transport and lie close to good road network connections and a local workforce.

Designation	Site Name
BEA 1	Howard Road
BEA6	Church Road
BEA 1 2	Justin Road/Trinity Way
BEA 1 3	Highams Park Industrial Estate
BEA 1 7	Joseph Ray Road
BEA 1 8	Hainault Road
BEA 2 2	Barrett Road

4.1 STRATEGIC CONSIDERATIONS

The sites can therefore help the borough meet the assessed needs for other types of employment space beyond industrial.

No net loss

These sites can and should continue to play an important role in meeting the range of business needs in the borough today and in the future. They offer the opportunity for co-location should sufficient replacement capacity be provided elsewhere and can continue to provide a more sustainable distribution of employment space across the borough

Designation	Site Name
SIL 6	Lammas Road
SIL 7	Orient Way
BEA5	Etloe Road/Simonds Road
BEA7	Heybridge Way
BEA8	Low Hall Depot
BEA9	Sutherland Road
BEA10	Clifford Road
BEA11	Waltham Park Way
BEA14	Montague Road/Courtenay Road Arches
BEA15	Temple Mills Lane
BEA16	Cabinet Way
BEA19	Hatherley Mews
BEA20	Lancaster Road Arches
BEA21	East London Office Centre
BEA23	E10 Business Centre
LBWF 7	Norlington Road
LBWF 9	Crownlea
LBWF 11	Shaftesbury Court
LBWF 22	Ravenswood Industrial Estate
LBWF 36	Skeltons Lane

It should be noted that both SIL 6 and SIL 7 are included, based on the Stage 1 recommendations of the Lea Bridge Gateway Masterplan.

Potential Designations

Based on conversations with the LB Waltham Forest policy team sites within the Local Plan are likely to be designated in tree classifications:

- Strategic Industrial Location (SIL) – which in line with the Intend to Publish London Plan Policy E5 will accommodate industrial and distribution uses, utilities, transport functions and waste facilities;
- Locally Significant Industrial Site (LSIS) – sites which will provide space for industrial and distribution activity;
- Borough Employment Area (BEA) – sites which can accommodate a range of B class employment uses and, potentially, residential space through co-location.

Based on the analysis within this report the matrix below suggests how these designations may align with the site conditions and employment space development opportunities identified. It should be noted that this analysis will not be the only determinant of the borough-wide strategy for land designations, the Local Plan will need to consider the matrix alongside other technical analysis in order to arrive at the optimum approach to meeting all future land needs

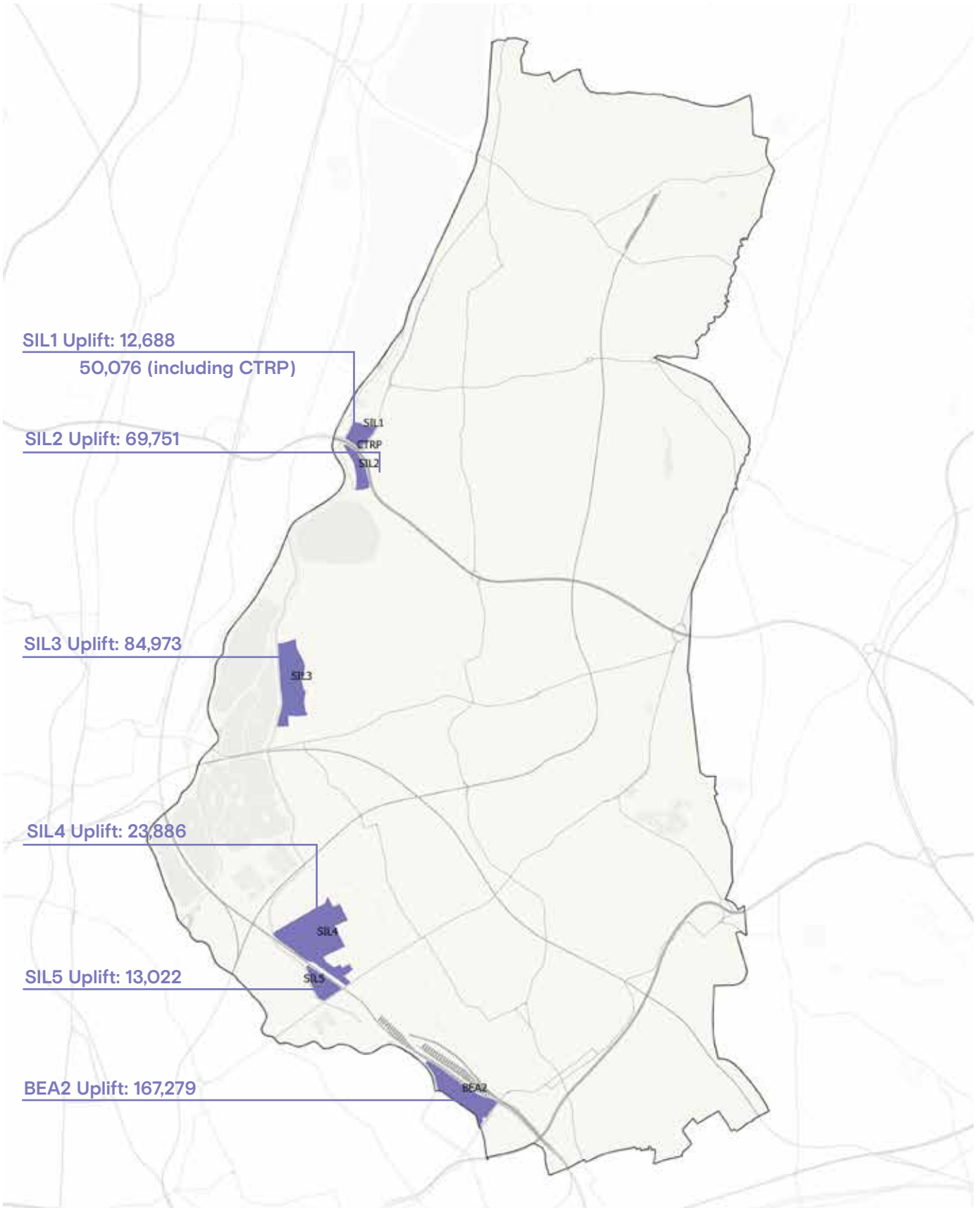
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Note - * Denotes where parts of the site could be considered for an alternate designation other than SIL, it does not suggest the whole site could be released from a SIL designation.

Site Name	SIL	LSIS	BEA
Hall Lane			
North Circular Road			
Blackhorse Lane*			
Argall Avenue			
Rigg Approach*			
Sherrin Road			
Cork Tree Retail Park			
Howard Road			
Church Road			
Justin Road/Trinity Way			
Highams Park Industrial Estate			
Joseph Ray Road			
Hainault Road			
Barrett Road			
Lammas Road			
Orient Way			
Etloe Road/Simonds Road			
Heybridge Way			
Low Hall Depot			
Sutherland Road			
Clifford Road			
Waltham Park Way			
Montague Road/Courtenay Road Arches			
Temple Mills Lane			
Cabinet Way			
Hatherley Mews			
Lancaster Road Arches			
East London Office Centre			
Norlington Road			
Crownlea			
Shaftesbury Court			
Ravenswood Industrial Estate			
Skeltons Lane			

4.2 INDUSTRIAL INTENSIFICATION SITES

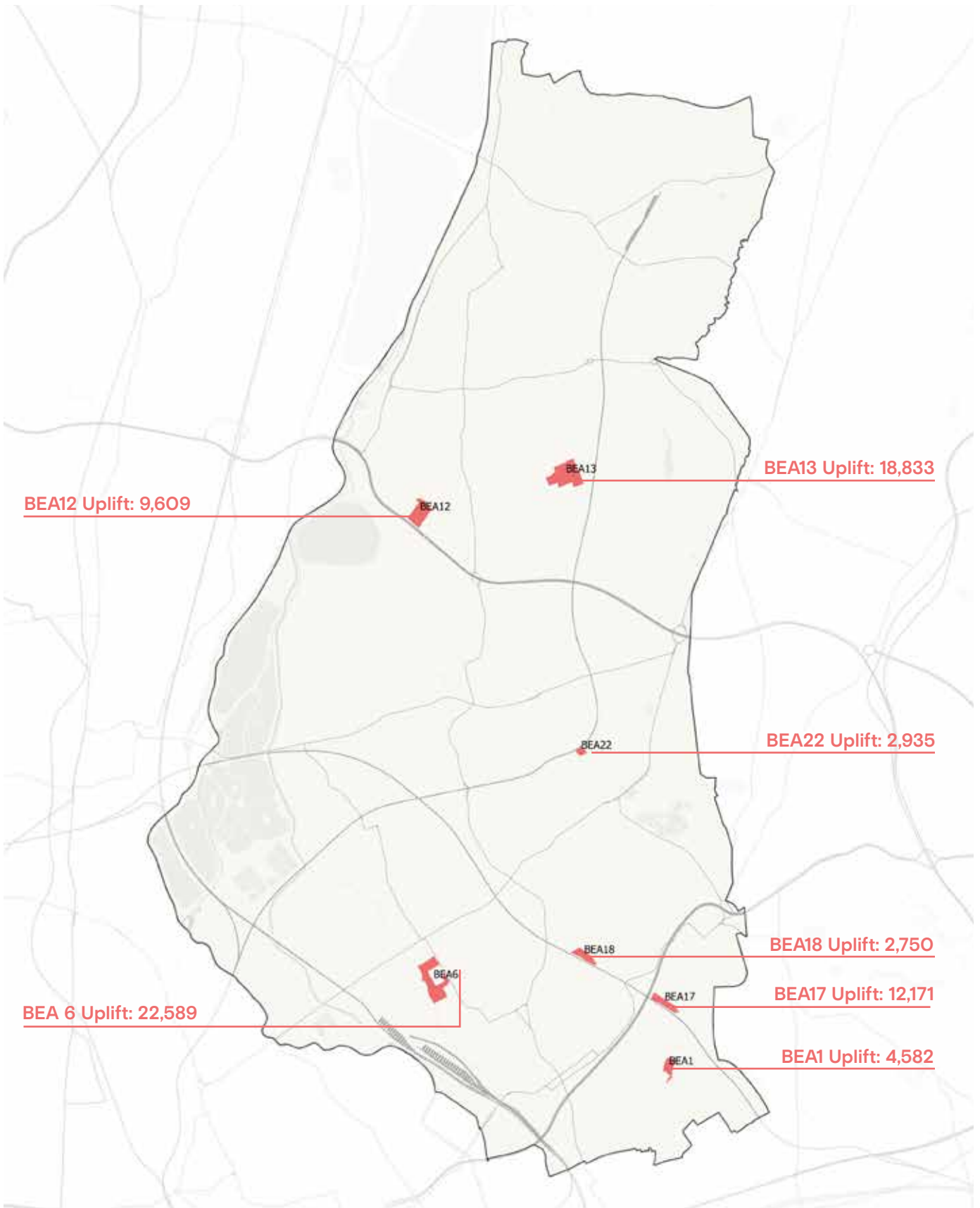
Designation	Site Name	Current Floorspace for Identified Areas of Intensification	Future Built Floorspace	Built Floorspace Uplift
SIL 1	Hall Lane	8,483	21,171	12,688
-	Inc Cork Tree Retail Park		50,076	50,076
SIL 2	North Circular Road	20,335	90,087	69,751
SIL 3	Blackhorse Lane	80,979	165,952	84,973
SIL 4	Argall Avenue	127,541	151,427	23,886
SIL 5	Rigg Approach	29,581	42,603	13,022
BEA 2	Sherrin Road	20,497	187,777	167,279
Total (Excluding Cork Tree Retail Park)				371,600



■ Industrial Intensification Sites

4.3 EMPLOYMENT INTENSIFICATION SITES

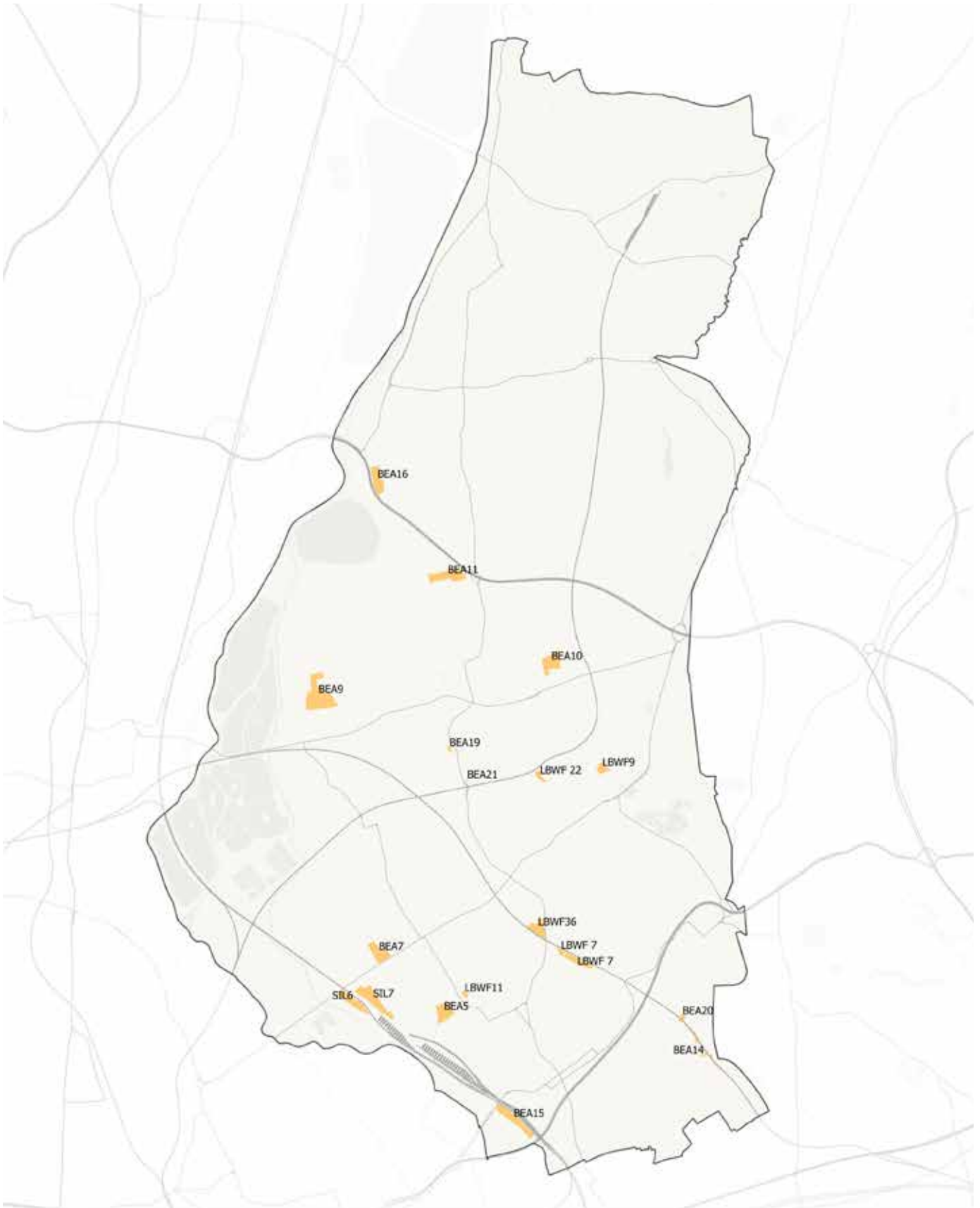
Designation	Site Name	Current Floorspace for Identified Areas of Intensification	Future Built Floorspace	Built Floorspace Uplift
BEA1	Howard Road	6,143	10,725	4,582
BEA6	Church Road	23,529	46,118	22,589
BEA12	Justin Road/ Trinity Way	12,044	21,653	9,609
BEA13	Highams Park Industrial Estate	33,597	52,430	18,833
BEA17	Joseph Ray Road	8,041	20,212	12,171
BEA18	Hainault Road	5,970	8,719	2,750
BEA22	Barrett Road	856	3,791	2,935
Total				73,469



■ Employment Intensification Sites

4.4 NO NET LOSS SITES

Designation	Site Name	Current Built Floorspace
SIL6	Lammas Road	12,570
SIL7	Orient Way	16,037
BEA3	Auckland Road	33,164
BEA5	Etloe Road/Simonds Road	3,252
BEA7	Heybridge Way	7,484
BEA8+Extension Area(SIL4)	Argall Avenue Extension	14,803
BEA9	Sutherland Road	2,281
BEA10	Clifford Road	1,043
BEA11	Waltham Park Way	10,280
BEA14	Montague Road/Courtenay Road Arches	1,511
BEA15	Temple Mills Lane	4,135
BEA16	Cabinet Way	7,802
BEA19	Hatherley Mews	1,396
BEA20	Lancaster Road Arches	1,724
BEA21	East London Office Centre	717
BEA23	E10 Business Centre	1,603
LBWF7	Norlington Road	11,247
LBWF9	Crownlea	2,027
LBWF11	Shaftesbury Court	957
LBWF22	Ravenswood Industrial Estate	1,222
LBWF36	Skeltons Lane	6,014



■ No Net Loss Sites

4.5 QUANTUM & TYPES OF SPACES

INDUSTRIAL INTENSIFICATION SITES

SIL 1: HALL LANE

**+ CORK TREE
RETAIL PARK**

**SIL 2: NORTH
CIRCULAR**

**SIL 3: BLACKHORSE
LANE**

Total Quantum

Total Current Built
Floorspace:
8,483

Potential Uplift:
12,688

Total Current Built
Floorspace:
20,335

Potential Uplift:
69,751

Total Current Built
Floorspace:
80,979

Potential Uplift:
84,973

Type of Space:

B1 - B1C - B2
Stacked mixed B class
(Medium-Large sized
units)

B8
Medium storage and
logistic/ distribution

B2 - B8
Larger industrial and
distribution activities,
logistic and 'last mile'
distribution warehouses.

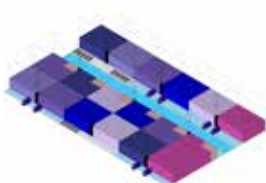
B1C - B2
Light Industry (Small-
Medium) on upper floors

B2 - B8
Larger industrial and
distribution activities,
logistic and 'last mile'
distribution warehouses.

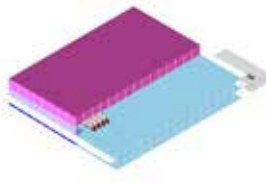
B1C - B2
Light Industry (Small-
Medium) on upper floors

B1 - B1C - B2
Stacked mixed B class
(Small-Medium-Large
sized units). Light uses
on upper floors

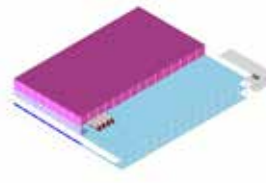
Industrial Intensification Typologies:



Typology B: Shared Yard
Plot Ratio: 156%



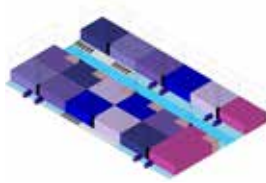
Typology D: Multi-storey
Industrial 3 Storey
Plot Ratio: 165%



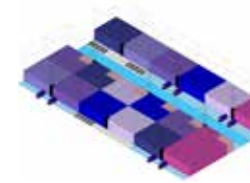
Typology D: Multi-storey
Industrial 3 Storey
Plot Ratio: 165%



Typology A: Industrial
Building
Plot Ratio: 200%



Typology B: Shared Yard
Plot Ratio: 156%



Typology B: Shared Yard
Plot Ratio: 156%

Built Project Precedents



Park du Crevecoeur
Paris, France



Prologis Georgetown Crossroads
Seattle, USA



Prologis Georgetown Crossroads
Seattle, USA



Gewerbehof Laim
Munich, Germany

SIL 4: ARGALL AVENUE

Total Quantum

Total Current Built Floorspace:

127,541

Potential Uplift:

23,886

SIL 5: RIGG APPROACH

Total Current Built Floorspace:

29,581

Potential Uplift:

13,022

BEA 2: SHERRIN ROAD

Total Current Built Floorspace:

20,497

Potential Uplift:

167,279

Type of Space:

B1 - B1C - B2

Stacked mixed B class (Small-Medium-Large sized units). Light uses on upper floors

B8

Medium storage and logistic/ distribution

B1 - B1C - B2

Stacked mixed B class (Small-Medium-Large sized units). Light uses on upper floors

B2 - B8

Larger industrial and distribution activities, logistic and 'last mile' distribution warehouses.

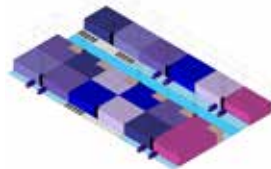
B1C - B2

Light Industry (Small-Medium) on upper floors

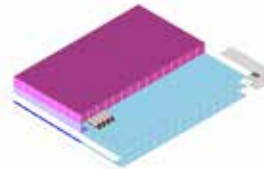
Industrial Intensification Typologies:



Typology B: Shared Yard
Plot Ratio: 156%



Typology B: Shared Yard
Plot Ratio: 156%



Typology D: Multi-storey
Industrial 3 Storey
Plot Ratio: 165%

Built Project Precedents



Berlartza
Donostia-San Sebastian, Spain



Hotel Industriel Patin
Paris, France



Prologis Georgetown Crossroads
Seattle, USA

4.5 QUANTUM & TYPES OF SPACES

INDUSTRIAL INTENSIFICATION SITES

BEA 1: HOWARD ROAD

Total Quantum

Total Current Built Floorspace:

6,143

Potential Uplift:

4,582

Type of Space:

BI-B1a, B1C

Stacked mixed B1 (Small-Medium-Large sized units)

BEA 6: CHURCH ROAD

Total Current Built Floorspace:

23,529

Potential Uplift:

22,589

BI- B1C

Stacked mixed B1 (Small-Medium-Large sized units)

B1a

Offices, Workshops, Professional services

BEA 12: JUSTIN ROAD/TRINITY WAY

Total Current Built Floorspace:

12,044

Potential Uplift:

9,609

BI-B1a, B1C

Stacked mixed B1 (Small-Medium-Large sized units)

BEA 13: HIGHAMS PARK

Total Current Built Floorspace:

33,597

Potential Uplift:

18,833

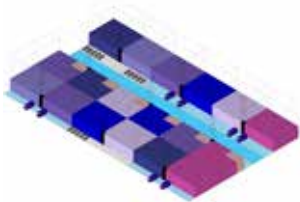
BI- B1C

Stacked mixed B1 (Small-Medium-Large sized units)

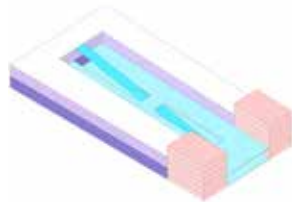
B1a

Offices, Workshops, Professional services

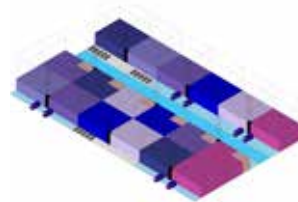
Industrial Intensification Typologies:



Typology B: Shared Yard
Plot Ratio: 156%



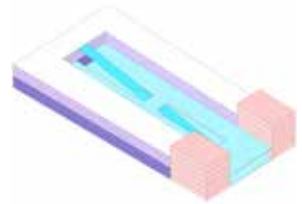
Typology F: Co-location
Plot Ratio: 126%



Typology B: Shared Yard
Plot Ratio: 156%



Typology A: Industrial Building
Plot Ratio: 200%



Typology F: Co-location
Plot Ratio: 126%

Built Project Precedents



Berlartza
Donostia-San Sebastian, Spain



Bink Twins Business Centre
The Hague, The Netherlands



Bink Twins Business Centre
The Hague, The Netherlands



Gewerbehof Laim
Munich, Germany

BEA 17: JOSEPH RAY ROAD

BEA 18: HAINAULT ROAD

BEA 22: BARRETT ROAD

Total Quantum

Total Current Built Floorspace:
8,041

Total Current Built Floorspace:
5,970

Total Current Built Floorspace:
856

Potential Uplift:
12,171

Potential Uplift:
2,750

Potential Uplift:
2,935

Type of Space:

B1 - B1C - B2
Stacked mixed B class (Small-Medium-Large sized units). Light uses on upper floors

B1 - B1C - B2
Stacked mixed B class (Small-Medium-Large sized units). Light uses on upper floors

B2 - B8
Larger industrial and distribution activities, logistic and 'last mile' distribution warehouses.

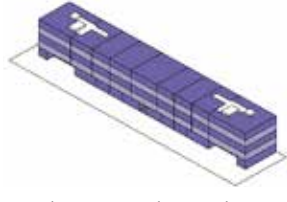
B8
Medium storage and logistic/ distribution

B1C - B2
Light Industry (Small-Medium) on upper floors

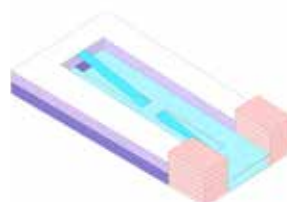
Industrial Intensification Typologies:



Typology F: Co-location
Plot Ratio: 126%



Typology A: Industrial Building
Plot Ratio: 200%



Typology F: Co-location
Plot Ratio: 126%

Built Project Precedents



Kaap Noord
Amsterdam, The Netherlands



Gewerbehof Laim
Munich, Germany



Kaap Noord
Amsterdam, The Netherlands

