



**London Borough
of Hounslow**

Hounslow Employment Land Review 2020 Update

July 2020

Project Ref 36072

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1 INTRODUCTION

- 1.1 The Hounslow Employment Land Review (ELR), published in July 2016, assessed the future demand and need for employment land in the borough in the period 2015-30, compared that demand with the planned land supply, and drew implications for planning policy. (The executive summary of the 2016 report is at Appendix A below). The present study, also commissioned by the Council, provides a partial update of the 2016 ELR. It replaces Chapter 5 of the 2016 report, which assessed the future demand and supply of employment land, and Chapter 6, which provided conclusions and recommendations. It is produced by the same consultancy as the original ELR - previously Peter Brett Associates (PBA), now known at Stantec.
- 1.2 The objectives of the present study are to:
- i Update the assessment of future demand, using the latest forecasts and rolling forward the study period to a 2019 base year;
 - ii Update the assessment of planned supply, using the latest data on development completed and committed, plus emerging allocations in the West of the Borough and Great West Corridor draft Local Plans, published for consultation in 2019;
 - iii Verify, and if necessary update, the findings of the original report about capacity for intensification at eight existing employment sites;
 - iv Consider the scope for additional intensification at a set of further sites that are proposed or being promoted for intensification
 - v Comment on some of the emerging new sites identified in the draft Local Plans, including commentary on strategic allocations and the strategy for industrial intensification.
- 1.3 Below, Chapter 2 responds to the first two objectives, providing quantitative assessments of future demand, planned supply and the balance between the two. Chapter 3 responds to the last three objectives, providing qualitative discussion of selected sites.
- 1.4 In line with established practice, in this report we define employment space as comprising:
- Industrial uses, defined here as covering warehouses as well as factories and workshops
 - Offices.
- 1.5 In relation to the Use Classes Order, employment space corresponds to classes B1, B2 and B8 and similar sui generis uses. The report does not deal with other land uses that also provide jobs, such as retail, leisure, education and health services.

- 1.6 At the time of writing the UK and the world are profoundly disrupted by the coronavirus pandemic. It is too soon to predict the economic impact of the pandemic, and therefore the present study takes no account of it. Any disruption may be short term, so that over the plan period as a whole it does not make a significant difference to the demand for employment land.
- 1.7 If and when the Council updates the employment land review, it should not use 2020, as a base year for forecasting, because this will be a highly untypical year, due to the pandemic. Forecasts based on 2019, like the ones used in this report, will provide a better indication of long-term trends.

2 DEMAND AND SUPPLY: QUANTITATIVE ASSESSMENT

- 2.1 In this chapter we provide updated forecasts of the demand for employment space:
- We start with a baseline scenario for the plan period 2019-34
 - As requested by the Council, we also provide a longer-term baseline scenario, for the period 2019-39
 - We then provide an alternative 'Heathrow expansion scenario', which assumes that the third runway is delivered.
- 2.2 For each demand scenario, we compare the forecast demand with the planned supply identified by the Council for the plan period 2019-34.

Demand: baseline scenario 2019-34

Future jobs by sector

- 2.3 In this update, as in the 2016 Employment Land Review, our assessment of employment land demand starts from predicted job numbers in Experian's local economic forecasts. Those forecasts, known as 'baseline', provide a business-as-usual view of local economic futures - starting from macroeconomic aggregates, and broadly assuming that Hounslow's growth relative to the UK and region will be similar in the future to the long-term past.
- 2.4 In this report we use Experian's September 2019 local economic forecast, which is based on its August 2019 macro forecast. That forecast assumed continuation of the government's economic policies as they were at the time. In regard to Brexit, it reflected Experian's 'central view' that a deal would be agreed around the middle of 2020. Normally Experian would have released a new local forecast in December 2019, but due to the uncertainty around the election this did not happen, and the September release is still the latest available baseline forecast.
- 2.5 Table 2.1 shows forecast workplace jobs¹ for the plan period 2019-34, split into economic sectors (industries and services). The table is colour-coded to provide a broad initial view of the demand for different types of space. The sectors that broadly speaking occupy industrial space are shaded blue, those that broadly occupy offices are shaded yellow, and those that broadly occupy other types of space (non-B sectors) are not shaded. Later in this chapter we will provide a more rigorous translation of economic sectors to types of space.

¹ Workplace jobs (also known as workforce jobs) are the jobs located in the borough.

Table 2.1 Forecast jobs by sector, Hounslow 2019-34

	SIC	2019	2034	Change	
Sectors				Jobs	%
Agriculture, Forestry & Fishing	A	0	0	0	-
Extraction & Mining	B	300	300	0	0%
Food, Drink & Tobacco (manufacture of)	C	1,200	1,000	-200	-17%
Textiles & Clothing (manufacture of)	C	0	0	0	-
Wood & Paper (manufacture of)	C	0	0	0	-
Printing and Recorded Media (manufacture of)	C	0	0	0	-
Fuel Refining	C	0	0	0	-
Chemicals (manufacture of)	C	0	0	0	-
Pharmaceuticals (manufacture of)	C	0	0	0	-
Non-Metallic Products (manufacture of)	C	500	400	-100	-20%
Metal Products (manufacture of)	C	600	500	-100	-17%
Computer & Electronic Products (manufacture of)	C	200	200	0	0%
Machinery & Equipment (manufacture of)	C	500	400	-100	-20%
Transport Equipment (manufacture of)	C	0	0	0	-
Other Manufacturing	C	1,100	900	-200	-18%
Utilities	D/E	700	600	-100	-14%
Construction of Buildings	F	2,300	2,400	100	4%
Civil Engineering	F	600	600	0	0%
Specialised Construction Activities	F	3,900	4,300	400	10%
Wholesale	G	11,700	12,100	400	3%
Retail	G	10,800	11,500	700	6%
Land Transport, Storage & Post	H	17,500	21,600	4,100	23%
Air & Water Transport	H	25,200	30,000	4,800	19%
Accommodation & Food Services	I	9,300	10,900	1,600	17%
Media Activities	J	14,800	16,500	1,700	11%
Telecoms	J	1,000	1,000	0	0%
Computing & Information Services	J	13,500	14,800	1,300	10%
Finance	K	2,400	2,600	200	8%
Insurance & Pensions	K	0	0	0	-
Real Estate	L	2,600	3,000	400	15%
Professional services	M	15,100	16,700	1,600	11%
Administrative & Supportive Services	N	19,100	21,100	2,000	10%
Public Administration & Defence	O	4,200	4,200	0	0%
Education	P	9,200	11,000	1,800	20%
Health	Q	6,900	8,000	1,100	16%
Residential Care & Social Work	Q	6,800	8,400	1,600	24%
Recreation	R	5,800	6,400	600	10%
Other Private Services	S	2,700	2,600	-100	-4%
Total		190,500	214,000	23,500	12%

Source: Experian September 2019, Stantec

- 2.6 Overall, Hounslow's forecast growth over the 15-year plan period is 23,500, or 12%. This is close to the growth of 21,050 jobs shown in the previous ELR for an earlier 15-year period, 2015-30.
- 2.7 The biggest sectoral job growth is in Air and Water Transport (+4,800 jobs) – probably covering operational crew and support staff, which are non-B jobs. Next is Land Transport (+4,100), which does require B class accommodation, as logistics / distribution is within the broad industrial category.
- 2.8 Manufacturing industries (Section C in the Standard Industrial Classification) are generally forecast to decline, though more slowly than in the past. These losses in manufacturing are more than offset by growth in other types of industrial activity, such as construction, wholesale and transport and storage.

Translating sector to land use

The forecast

- 2.9 The next step in our calculation is to translate jobs by economic sector into jobs by type of employment space. Appendix B below describes our method in detail. Briefly, the calculation starts from assumptions about the type of space occupied by different economic sectors (industries and services). In broad terms, we assume that:
- Industrial space is occupied by manufacturing, some transport and distribution activities, and elements of construction, utilities and other services;
 - Offices are occupied by administration, finance and insurance, professional services, media and computing.
- 2.10 As shown in Appendix B, our mapping of sectors into space starts from five-digit categories in the government's Standard Industrial Classification (SIC 2007), which provide a very fine-grained analysis of the economy. But in translating job forecasts into space we cannot use this classification directly, because the forecasts use a much coarser version, comprising only 38 sectors. For example, our mapping scheme counts as B-space activity only part of the Construction industry (SIC Division F - 43.2, 43.3 and 43.9), whereas the forecasts show only Construction as a whole (SIC 43). To estimate future employment in sub-sectors such as SIC 43.2 (electrical, plumbing and other construction installation activities), we assume that the share of each sub-sector's employment in its 'parent' sector stays constant in future. For example, if at the base date of the forecast SIC 43.2 in the subject district accounted for 10% of all Construction jobs, we assume that the same ratio will apply over the forecast period.
- 2.11 Our assumptions about sector-to-space relationships were tested successfully in a large study for the Yorkshire and Humber regional partners in 2010. Nevertheless they are subject to uncertainty, because individual business units may be untypical of the wider sector of which they are part, as discussed in more detail in the final paragraphs of Appendix B.

Table 2.2 Forecast jobs by type of space, Hounslow 2019-34

Sectors	SIC	2019	2034	Change		Office jobs	Industrial jobs	Other jobs
		Total jobs	Total jobs	%	%			
Agriculture, Forestry & Fishing	A	0	0	0	-	0	0	0
Extraction & Mining	B	300	300	0	0%	0	0	0
Food, Drink & Tobacco (manufacture of)	C	1,200	1,000	-200	-17%	0	-200	0
Textiles & Clothing (manufacture of)	C	0	0	0	-	0	0	0
Wood & Paper (manufacture of)	C	0	0	0	-	0	0	0
Printing and Recorded Media (manufacture of)	C	0	0	0	-	0	0	0
Fuel Refining	C	0	0	0	-	0	0	0
Chemicals (manufacture of)	C	0	0	0	-	0	0	0
Pharmaceuticals (manufacture of)	C	0	0	0	-	0	0	0
Non-Metallic Products (manufacture of)	C	500	400	-100	-20%	0	-100	0
Metal Products (manufacture of)	C	600	500	-100	-17%	0	-100	0
Computer & Electronic Products (manufacture of)	C	200	200	0	0%	0	0	0
Machinery & Equipment (manufacture of)	C	500	400	-100	-20%	0	-100	0
Transport Equipment (manufacture of)	C	0	0	0	-	0	0	0
Other Manufacturing	C	1,100	900	-200	-18%	0	-200	0
Utilities	D/E	700	600	-100	-14%	0	-92	-8
Construction of Buildings	F	2,300	2,400	100	4%	0	0	100
Civil Engineering	F	600	600	0	0%	0	0	0
Specialised Construction Activities	F	3,900	4,300	400	10%	0	397	3
Wholesale	G	11,700	12,100	400	3%	0	342	58
Retail	G	10,800	11,500	700	6%	0	0	700
Land Transport, Storage & Post	H	17,500	21,600	4,100	23%	0	1,658	2,442
Air & Water Transport	H	25,200	30,000	4,800	19%	0	0	4,800
Accommodation & Food Services	I	9,300	10,900	1,600	17%	0	0	1,600
Media Activities	J	14,800	16,500	1,700	11%	1,620	0	80
Telecoms	J	1,000	1,000	0	0%	0	0	0
Computing & Information Services	J	13,500	14,800	1,300	10%	1,300	0	0
Finance	K	2,400	2,600	200	8%	200	0	0
Insurance & Pensions	K	0	0	0	-	0	0	0
Real Estate	L	2,600	3,000	400	15%	400	0	0
Professional services	M	15,100	16,700	1,600	11%	1,533	0	67
Administrative & Supportive Services	N	19,100	21,100	2,000	10%	904	54	1,041
Public Administration & Defence	O	4,200	4,200	0	0%	0	0	0
Education	P	9,200	11,000	1,800	20%	0	0	1,800
Health	Q	6,900	8,000	1,100	16%	0	0	1,100
Residential Care & Social Work	Q	6,800	8,400	1,600	24%	0	0	1,600
Recreation	R	5,800	6,400	600	10%	0	0	600
Other Private Services	S	2,700	2,600	-100	-4%	-36	-22	-42
Total jobs		190,500	214,000	23,500	12%	5,921	1,638	15,941
Change p.a.				1,567		395	109	1,063

Source: Experian, Stantec

2.12 The outcome of the mapping exercise is to divide job growth into three categories:

- Jobs that are based in office space (office jobs)
- Jobs that are based in industrial space (industrial jobs)
- Jobs that are based in other kinds of space, such as retail shops and stores, leisure and cultural venues, schools, hospitals etc (other jobs or non-B jobs).

- 2.13 The forecast job growth in the first two categories is taken forward into the employment land calculation, as described below. The growth in other (non-B) jobs is set aside, as it does not bear on employment land needs.
- 2.14 Overall, 68% of the forecast net new jobs are in non-B space, 25% in offices and 7% in industrial space:
- In the industrial category, in round numbers manufacturing loses 700 jobs, while transport and distribution sectors gain 2,000 jobs and other industrial uses (various services including construction) gain 300 jobs. The net outcome is a gain of 1,638 jobs over the period.
 - In the office category, Hounslow gains 5,921 jobs. Most of the growth is in Media, Computing & Information Services and Professional Services, while traditional activities such as insurance and finance gain few jobs or none.
- 2.15 The 2016 ELR already noted the exceptional growth potential of the Media sector – which in Hounslow mainly relates to TV production and related activities, and therefore is often known as ‘broadcasting’, ‘creative’, ‘digital’ or a combination of these terms. The 2016 ELR also noted the sectors’ high priority in terms of local policy, with reference to the Council’s Great West Corridor Plan and Regeneration and Economic Development Strategy². In December 2018 the importance of the sector in Hounslow was further recognised in the Mayor of London’s designation of a Creative Enterprise Zone in the Great West Road – one of six zones identified across London.
- 2.16 In relation to the qualitative mix of space, small and medium businesses in the Media sector have distinctive requirements, as do their counterparts in Computing. As the 2016 ELR also pointed out³, these businesses typically want affordable space, but they are not attracted to older, secondary offices, for example above shops. Rather, they are looking for ‘edgy’, industrial-looking, stripped-back spaces. While in our forecast this demand is classified as offices, in practice it may be accommodated in ‘hybrid’, ‘flexible’ or ‘multifunctional’ spaces that may be used as offices, light industrial units or a mixture of the two. The Council’s strategy is to meet it through provision of ‘flexible industrial uses’ in the Creative Enterprise Zone.

Comparisons

- 2.17 By comparison with the 2016 ELR, and bearing in mind that the two studies cover different though overlapping 15-year periods:
- In the industrial category, the number of additional jobs has halved, due to lower growth in Land Transport, Storage and Post (1,000 fewer additional jobs over the period) and Specialised Construction Activities (600 fewer additional jobs over the period).

² At the time of the ELR the Regeneration and Economic Development Strategy was in draft. It was adopted by the Council later in 2016.

³ See para 4.47 onwards.

- In the office category, the 2016 study showed 5,763 additional jobs, very similar to the updated figure in the present version.
- 2.18 We have also compared our forecast of office jobs with those shown in the GLA’s London Office Policy Review (LOPR) 2017, which is part of the evidence base supporting the new London Plan. Table 6.1 in the Plan⁴ shows those LOPR figures, which are described as ‘projections’ rather than ‘forecasts’. Supporting text says that table 6.1 ‘provide[s] a broad monitoring benchmark which needs to be set against other drivers such as development trends, employment densities, rents, take-up and vacancy’. But the table does not show individual boroughs such as Hounslow, only totals for London as a whole and three subdivisions – Outer London, the Central Activities Zone plus Northern Isle of Dogs, and the rest of Inner London.
- 2.19 LOPR’s figures, which are taken from GLA Economics forecasts, are for 2016-41. They show office jobs in Hounslow growing by 780 p.a., almost double the 395 dpa in our forecast above. For London as a whole LOPR also shows more new office jobs than our forecast, but the difference with our figures is much smaller, at 17% (Table 2.3).

Table 2.3 London office jobs – LOPR v this study

Change	LOPR	This study	Difference
	2016-41	2019-34	%
Jobs	619,325	316,385	
Jobs p.a.	24,773	21,092	17%

Source: LOPR 2017, Stantec

- 2.20 As this comparison shows, the main reason why LOPR predicts twice as much office growth for Hounslow as we do is that it gives Hounslow a much larger share of the London total. This is probably because GLA Economics use a different method to ours: as well as future demand, measured by forecast job growth, its forecast also takes account of development capacity, measured by the estimated supply of development land. For our present purpose this approach is not helpful, because we aim to gauge future demand or need, regardless of the land supply available to accommodate that demand. We will assess land supply separately in Chapter 3 below.
- 2.21 In relation to industrial space, the evidence base for the new London Plan is the 2017 London Industrial Demand Study. That study’s view of future job change cannot be directly compared with our own, because its sector definitions are different from ours, and in relation to logistics (warehousing) it does not use predicted employment at all. To compare our predictions with those of the

⁴ This and other references to the New London Plan refer to *The London Plan, Intend to Publish (clear version)*, Mayor of London, December 2019

Industrial Demand Study we need to look at floorspace rather than employment figures. We will provide this comparison later in this chapter.

Translating jobs to space

Employment densities

- 2.22 The next step in our calculation is to translate jobs into demand for floorspace, using floorspace per job, or employment density⁵. To assess current densities, in relation to each type of employment use we have divided the borough's floorspace stock, as provided by Valuation Office Agency (VOA) statistics, by its number of jobs, as estimated earlier. The results are 11.4 sq m per job for offices and 50.9 sq m per job for industrial space (Table 2.4).

Table 2.4 Estimated employment densities, Hounslow 2019

	Office	Industrial
Jobs	57,896	26,286
	NIA	GIA
Floorspace (sq m)	662,000	1,337,000
Job density (sq m/job)	11.4	50.9

Source: VOA, Stantec

- 2.23 As a sense check, we have compared the above ratios with the 2015 HCA Employment Densities Guide, which is the standard reference source on the matter (although the basis of its findings is not clear). The comparison is not straightforward, for two reasons. Firstly, the HCA figures only relate to occupied floorspace, while the VOA also includes vacant floorspace; secondly, the HCA does not provide a single ratio, but a range of figures, for different varieties of office and industrial space. Also, the HCA figures are for England as a whole, rather than Hounslow or London specifically.
- 2.24 For offices, the HCA density ratios range from 11 to 13 sq m of occupied floorspace per job. This suggests that our estimate of 11.4 sq m of total floorspace per job for Hounslow is reasonable. Therefore, we will use this estimate to forecast the demand for space over the plan period.
- 2.25 For industrial space, the question is more complicated. The HCA guide shows a wide range of densities, at 36 sq m for general industrial use, 47 sq m for light industrial and 70-95 sq m for different types of B8 distribution. In broad terms, this suggests that our all-industrial 50.9 sq m per job is a reasonable estimate of current densities in Hounslow. But in relation to the future demand for industrial space, the ratio of 50.9 looks may be too low.

⁵ Strictly speaking employment density is the number of jobs per unit of floorspace, i.e. the inverse of floorspace per worker. In practice the two terms are often used interchangeably.

- The HCA shows much higher ratios for warehousing than other industrial uses
- There is much other evidence to suggest that this is generally correct in relation to large-scale strategic warehousing;
- But for small to medium distribution units, everyday observation suggests densities may be similar to manufacturing and services – though there is no formal evidence to confirm this.
- In Hounslow, while the existing industrial stock accommodates a mix of distribution and other industries, nearly all the forecast growth is in distribution as discussed earlier (see Table 2.2).
- Therefore, net additional industrial space will be mostly occupied by distribution uses.
- We cannot predict how much of that distribution space will be in large warehouses, with high floorspace per head, against smaller units
- But the market analysis in the 2016 ELR does suggest that the strongest demand is for larger units around Heathrow – see Appendix A below, paras 10-11, and the 2016 ELR, paras 4.82 onwards.

2.26 To reflect the uncertainty around future densities, we have created two industrial demand scenarios, based on alternative assumptions about employment densities in net additional space:

- Scenario A assumes 77 sq m per job, which is the figure given by the HCA for regional distribution centres.
- Scenario B assumes 50.9 sq m per job, which as noted earlier is the estimated average for Hounslow in 2019.

2.27 These two densities are not exactly comparable, because the figure of 77 sq m per job relates to occupied floorspace only, since it is (loosely) based on business surveys; while 50.9 sq m relates to all floorspace, since it is based on VoA statistics, which cover vacant units as well as occupied ones. Our demand calculation takes account of this small difference, as we explain later.

The demand for industrial space

Net demand

2.28 The table below translates the industrial job forecasts into demand for floorspace.

2.29 The calculation starts from the job growth forecast over the plan period (row a). Multiplied by the density factor (floorspace per job) at row b, this produces occupier demand at row c. In the forecast, this is the net additional floorspace that industrial occupiers will want to take up.

Table 2.5 Demand for industrial floorspace, Hounslow, 2019-34

Scenario A: 77 sq m occupied floorspace per job

Demand	Total	p.a.
a Jobs change	1,638	109
b Density factor (sq m occupied space per job)	77.0	
c Occupier demand (sq m) (a* b)	126,088	8,406
d Stock vacancy adjustment (sq m)	62,928	
e Future vacancy factor (sq m) (c * 8.1%)	10,213	681
f Net development demand (sq m) (c+d+e)	199,230	
g Replacing permitted losses (sq m)	53,554	
h Gross development demand (sq m) (f+g)	252,784	

Scenario B: 50.9 sq m total floorspace per job

Demand	Total	p.a.
a Jobs change	1,638	109
b Density factor (sq m total space per job)	50.9	
c Occupier demand (sq m) (a* b)	83,349	5,557
d Stock vacancy adjustment (sq m)	62,928	
e Vacancy factor (sq m) c* 7.5% - current 2.7 % vacancy)	3,987	266
f Net development demand (sq m) (c+d+e)	150,264	
g Replacing permitted losses (sq m)	53,554	
h Gross development demand (sq m) (f+g)	203,818	

Source: Stantec

Note: at 2019 the industrial floorspace stock is 1,311,000 sq m and the vacancy rate is 2.7%. The stock adjustment factor is $1,311 * (7.5\% - 2.7\%)$. The adjustments bring the 2019 vacancy rate to the natural rate of 7.5%.

- 2.30 To this occupier demand, in rows d and e we apply vacancy adjustments. This is because in a healthy property market there should always be some vacant floorspace, to allow for units that are empty between tenancies (perhaps while they are being refurbished) and generally for choice and competition. As a rule of thumb, property agents generally agree that this 'normal' or 'natural' vacancy should be between 5% and 10% of the floorspace stock. We have used the average of these figures, 7.5%.
- 2.31 In Hounslow, to estimate the current (2019) vacancy rates we have taken vacant floorspace from the CoStar database and divided it by the floorspace stock, from

VOA statistics. For industrial space, the result is a vacancy rate of 2.7%, considerably below the normal rate - suggesting that floorspace is significantly undersupplied. This agrees with the property market analysis in the 2016 study, which found that supply fell short of demand in both sections of the market – high-quality modern warehousing and smaller, lower-specification units serving the local market.

- 2.32 In our demand calculation, if the actual vacancy rate is below 7.5% developers will want to build more space than occupiers will take up, so the rate rises to its natural level. Conversely, if the vacancy rate is above its natural level developers will seek to build less space, so the rate falls to its natural level.
- 2.33 In short, there is a difference between occupier demand – the floorspace that businesses will want to occupy – and development demand – the floorspace that developers and landowners will want to provide. In our Scenario A, the difference is made through two adjustments:
- The *stock vacancy adjustment* at row d brings vacancy at 2019 to its natural level. In effect it is a market signals adjustment, showing the additional floorspace that is required to eliminate any undersupply, or the reduction in floorspace that is required to eliminate any oversupply, in the base year of the forecast.
 - The *future vacancy factor* at row e is added to maintain the natural vacancy rate in future, as the floorspace stock grows:
 - A natural vacancy of 7.5% means that, of every 100 sq m of space, 92.5 sq m would be occupied and 7.5 sq m would be vacant.
 - Therefore, for every 92.5 sq m of additional space that will be taken up by occupiers, developers will aim to provide a further 7.5 sq m that will remain vacant.
 - Hence the developer demand for net additional space will be $7.5 / 92.5 = 8.1\%$ above occupier demand.
- 2.34 In scenario B, the stock vacancy adjustment is the same, except that the future vacancy factor is 7.5%, because it applies to all floorspace, not just occupied floorspace.
- 2.35 In the 2016 study we were not able to make these vacancy adjustments, because we could not calculate vacancy rates, as the floorspace stock was not known (VOA figures were only published later).
- 2.36 The resulting demand for net additional space over the plan period (row f) is 199,230 sq m in Scenario A and 150,264 sq m in Scenario B.
- 2.37 Before concluding on which figure is the more reliable, we compare them briefly with the previous ELR and the GLA evidence base.

Comparisons

- 2.38 In the 2016 ELR, net demand for a slightly earlier period, 2015-30, was assessed as 154,440 sq m – in between the two updated scenarios above, but much closer to the higher Scenario B. The 2019 assessment was based on higher job growth, lower floorspace per job than in either of our scenarios (44 sq m per job, taken from the GLA evidence base) and no vacancy adjustments.
- 2.39 We have also compared our net demand figures with those shown in the GLA's London Industrial Demand Study (2017). That study includes industrial demand figures for 2016-41 (25 years), which are interchangeably called 'projections' or 'forecasts'. For Hounslow, the figures are as follows:
- General and light industry: minus 38,150 sq m, based on average of:
 - GLA employment projections (2016), with employment densities of 36- or 50 sqm per job depending on sub-sector
 - Past annual floorspace change in 2008-15
 - Warehousing and logistics: plus 12,100 sq m, based on average floorspace change in 1998-2008
 - Total industrial: minus 26,050 sq m, equal to the sum of the above, or minus 1,042 sq m per year
- 2.40 This view of the future shows about one tenth of the demand forecast in our own scenarios above - which in round numbers show net demand between 10,000 and 13,000 sq m per year (albeit for the shorter period 2019-34).
- 2.41 In relation to warehousing and logistics, the table below, copied from the London Industrial Demand Study, shows projected demand across London.

Table 2.6 Projected demand for Warehousing, London Boroughs, 2016-41, from London Industrial Demand Study

Sub Region	Property Market Area	Borough	Floorspace
Central	Central Services	Camden	-34,900
Central	Central Services	City of London	0
Central	Central Services	Islington	-109,500
Central	Central Services	Kensington and Chelsea	-47,700
Central	Central Services	Lambeth	-109,500
Central	Central Services	Southwark	-141,500
Central	Central Services	Westminster	16,900
East	Thames Gateway	Barking and Dagenham	245,900
East	Thames Gateway	Bexley	344,500
East	Thames Gateway	Greenwich	258,000
East	Central Services	Hackney	-90,100
East	Thames Gateway	Havering	135,100
East	Central Services	Lewisham	-36,400
East	Thames Gateway	Newham	-88,000
East	Thames Gateway	Redbridge	44,000
East	Central Services	Tower Hamlets	-236,800
East	Lea Valley	Waltham Forest	100,200
North	Park Royal/Heathrow	Barnet	60,700
North	Lea Valley	Enfield	353,600
North	Lea Valley	Haringey	-98,600
South	Thames Gateway	Bromley	53,100
South	Wandle Valley	Croydon	-27,300
South	Wandle Valley	Kingston upon Thames	-56,200
South	Wandle Valley	Merton	41,000
South	Park Royal/Heathrow	Richmond upon Thames	72,800
South	Wandle Valley	Sutton	110,800
South	Wandle Valley	Wandsworth	98,600
West	Park Royal/Heathrow	Brent	396,100
West	Park Royal/Heathrow	Ealing	323,300
West	Park Royal/Heathrow	Hammersmith and Fulham	101,700
West	Park Royal/Heathrow	Harrow	25,800
West	Park Royal/Heathrow	Hillingdon	-109,300
West	Park Royal/Heathrow	Hounslow	12,100
			1,608,400

Source: CAG Consultants for Mayor of London, London Industrial Demand Study, 2017, Table 7.2

- 2.42 In the GLA report the above figures are heavily caveated:
‘As with other projections of this type the Borough level figures should be seen as only indicative as demand can readily transfer between Boroughs in the same property market area depending on the availability of premises.’
- 2.43 We have not audited the evidence behind the GLA figures. But in our opinion they are not credible in relation to individual boroughs. In West London, for example, it shows negative demand in Hillingdon, which contains Heathrow Airport, and positive but insignificant demand in Hounslow, which adjoins the airport. In contrast, Hammersmith and Fulham attracts about eight times more demand than Hounslow, while Brent and Ealing each attract more than 25 times more demand than Hounslow.
- 2.44 In short, for the purpose of assessing employment land need in Hounslow we consider that the projections in the London Industrial Demand Study are not directly relevant.
- 2.45 The projections did inform employment land policy in the draft New London Plan, as they were one of the factors determining the industrial release categorisation of boroughs under Policy E4 of the draft plan. But that categorisation is no longer part of the new London Plan, as it was deleted by the Secretary of State on 13th March 2020.

Gross demand

- 2.46 So far, our demand calculation has related to net floorspace change, which is the difference between floorspace to be gained in new development and any existing floorspace that may be lost when employment sites are transferred to other uses. But for the purpose of plan-making we need to forecast the demand for gross floorspace change – the total industrial floorspace that will be developed, if the planning authority provides land for it. To arrive at that gross demand, we need to add to the net figure the replacement of any existing floorspace that will be lost in the plan period, for example when industrial sites are redeveloped for employment or mixed use.
- 2.47 We do this in row g of the table, based on the losses of industrial space implied by outstanding planning permissions. We have calculated those losses from monitoring data provided by the Council, arriving at a total of 53,554 sq m (a detailed schedule is at Appendix C).
- 2.48 The result of the calculation, at row h of the table, is industrial demand for:
- 252,784 gross additional sq m in scenario A
 - 203,818 sq m gross additional sq m in scenario B.
- 2.49 The stock vacancy adjustment, at 62,928 sq m in each scenario, is a surprisingly large component of this total demand. The reason why the adjustment is so large is that the vacancy reduction of almost five percentage points is applied to a very large stock of existing floorspace – 1,311,000 sq m as measured by the VOA.

How much industrial land to plan for?

- 2.50 Scenario B, the lower of our two scenarios, in our view underestimates the demand for industrial land. This is because it does not allow for any increase in today's average density ratio of 50.9 sq m per job. But in reality the ratio is very likely to increase, for two reasons:
- Economic forecasts suggest that the bulk of net additional space in the plan period will be occupied by distribution / logistics (see Table 2.2 above).
 - Within distribution / logistics, market analysis suggests that demand is strongest for large units in the west of the Borough, related to Heathrow (see Appendix A below, para 10-11, and 2016 ELR, para 4.82 onwards).
 - Those large units are likely to have significantly higher floorspace per head than smaller warehouses in the urban area – although the actual figure is not known.
 - In coming years, large modern units may see even lower floorspace per head as automation progress.
- 2.51 For these reasons, we consider that Scenario A, which assumes 77 sq m per job, is a more reliable indication of future demand. In order to meet need over the plan period, the Council should plan for around 253,000 sq m of gross new industrial floorspace, in line with this scenario.
- 2.52 This figure makes no allowance for any future windfall losses of existing space, over and above the pipeline of planning permissions outstanding at 31st March 2019. In effect, it assumes that there will be no such windfalls. But if there are windfall losses, and if the forecast demand is to be met, planning will need to provide additional land to replace those losses, over and above our scenario.

The demand for office space

- 2.53 Table 2.7 shows the demand for office space, which we derive through the same method as industrial space below. we use the density of 11.4 sq m that we estimated earlier for Hounslow. In relation to vacancy adjustments we use the same method as for industrial scenario B, because our office density relates to all floorspace, both occupied and vacant.
- 2.54 In relation to offices the vacancy adjustments are negative, because the vacancy rate, at 9%. is slightly higher than the natural rate of 7.5%. This is a small negative market signal, suggesting that the office market is marginally oversupplied. Again this agrees with the 2016 study, which showed a contrast between two sub-markets – so large corporate modern offices in modern campuses were in short supply, while smaller, cheaper offices in the borough's town centres were over-supplied (see Appendix A, para 8 and 2016 ELR, para 4.13 onwards).

Table 2.7 Demand for office floorspace, Hounslow 2019-34

Demand	Total	p.a.
a Jobs change	5,921	395
b Density factor (sq m total space per job)	11.4	
c Occupier demand (sq m) (a* b)	67,502	4,500
d Stock vacancy adjustment (sq m)	-9,765	
e Future vacancy factor (sq m)	-1,013	-68
f Net development demand (sq m) (c+d+e)	56,724	
g Replacing permitted losses (sq m)	128,939	
h Gross development demand (sq m) (f+g)	185,663	

Source: Stantec

- 2.55 The result of the calculation is a net demand for 56,724 sq m of net additional office space – the outcome of 67,502 sq m to accommodate job growth and negative vacancy adjustments of minus 10,778 sq m.
- 2.56 By comparison, for a slightly earlier 15-year period the 2016 ELR showed net demand of 70,333 sq m. The two calculations were based on virtually the same job growth and employment density. The reason why the present update shows lower need is that it includes vacancy adjustments, which are negative. As explained earlier, we did not adjust for vacancy in the original ELR, because the necessary data were not available.
- 2.57 To forecast growth demand for offices – the total amount of development that should be planned for – we add to net demand the replacement of committed losses. Those losses, in planning permissions and prior approvals under Permitted Development Rights at 31 March 2019, amount to of 128,939 sq m. With replacement of losses, the forecast gross demand comes to 185,663 sq m of offices over the plan period.
- 2.58 Again, the above calculation makes no allowance for any future windfall losses of existing space, over and above planning commitments. If there are such losses, and if the forecast demand is to be met, planning will need to provide additional land to replace those losses, over and above our figure of 185,663 sq m.

Demand: baseline scenario 2019-39

- 2.59 As mentioned earlier, as well as the plan period the Council has asked us to consider the demand for employment space over a longer time horizon, 2019-39. For this, we have used the Experian forecast for that longer period, noting that it shows virtually the same annual growth in total jobs – 1,580 jobs p.a. against 1,567 jobs p.a. for 2019-34. The sectoral split of additional jobs is also very similar for the two periods. The results, for industrial and office space

respectively, are in the tables below. In regard to floorspace demand, for industrial space we only show Scenario A, because it is our preferred view. Underlying assumptions and methods are the same as for the previous forecasts; the only elements that have changed are occupier demand (row c) and the future vacancy factor (row e), which is calculated from occupier demand.

Table 2.8 Forecast jobs by type of space, Hounslow 2019-39

Sectors	SIC	2019	2039	Change		Office jobs	Industrial jobs	Other jobs
				Total jobs	%			
Agriculture, Forestry & Fishing	A	0	0	0	-			
Extraction & Mining	B	300	300	0	0%			
Food, Drink & Tobacco (manufacture of)	C	1,200	900	-300	-25%	0	-300	0
Textiles & Clothing (manufacture of)	C	0	0	0	-	0	0	0
Wood & Paper (manufacture of)	C	0	0	0	-	0	0	0
Printing and Recorded Media (manufacture of)	C	0	0	0	-	0	0	0
Fuel Refining	C	0	0	0	-	0	0	0
Chemicals (manufacture of)	C	0	0	0	-	0	0	0
Pharmaceuticals (manufacture of)	C	0	0	0	-	0	0	0
Non-Metallic Products (manufacture of)	C	500	400	-100	-20%	0	-100	0
Metal Products (manufacture of)	C	600	400	-200	-33%	0	-200	0
Computer & Electronic Products (manufacture of)	C	200	200	0	0%	0	0	0
Machinery & Equipment (manufacture of)	C	500	300	-200	-40%	0	-200	0
Transport Equipment (manufacture of)	C	0	0	0	-			
Other Manufacturing	C	1,100	900	-200	-18%	0	-200	0
Utilities	D/E	700	600	-100	-14%	0	-92	-8
Construction of Buildings	F	2,300	2,400	100	4%	0	0	100
Civil Engineering	F	600	600	0	0%			
Specialised Construction Activities	F	3,900	4,400	500	13%	0	497	3
Wholesale	G	11,700	12,200	500	4%	0	427	73
Retail	G	10,800	11,800	1,000	9%	0	0	1,000
Land Transport, Storage & Post	H	17,500	23,200	5,700	33%	0	2,305	3,395
Air & Water Transport	H	25,200	31,700	6,500	26%	0	0	6,500
Accommodation & Food Services	I	9,300	11,200	1,900	20%	0	0	1,900
Media Activities	J	14,800	16,700	1,900	13%	1,810	0	90
Telecoms	J	1,000	1,000	0	0%			
Computing & Information Services	J	13,500	15,400	1,900	14%	1,900	0	0
Finance	K	2,400	2,700	300	13%	300	0	0
Insurance & Pensions	K	0	0	0				
Real Estate	L	2,600	3,100	500	19%	500	0	0
Professional services	M	15,100	17,400	2,300	15%	2,204	0	96
Administrative & Supportive Services	N	19,100	22,000	2,900	15%	1,311	78	1,510
Public Administration & Defence	O	4,200	4,200	0	0%	0	0	0
Education	P	9,200	11,600	2,400	26%	0	0	2,400
Health	Q	6,900	8,400	1,500	22%	0	0	1,500
Residential Care & Social Work	Q	6,800	8,700	1,900	28%	0	0	1,900
Recreation	R	5,800	6,600	800	14%	0	0	800
Other Private Services	S	2,700	2,600	-100	-4%	-36	-22	-42
Total jobs		190,500	221,900	31,400	16%	7,990	2,194	21,217
Change p.a.				1,570	0	399	110	1,061

Table 2.9 Demand for industrial floorspace, Hounslow 2019-39, Scenario A

Demand	Total	p.a.
a Jobs change	2,194	109
b Density factor (sq m occupied space per job)	77.0	
c Occupier demand (sq m) (a* b)	168,938	8,447
d Stock vacancy adjustment (sq m)	62,928	
e Future vacancy factor (sq m) (c * 8.1%)	13,684	684
f Net development demand (sq m) (c+d+e)	245,550	
g Replacing permitted losses (sq m)	53,554	
h Gross development demand (sq m) (f+g)	299,104	

Source: Stantec

Table 2.10 Demand for office floorspace, Hounslow 2019-39

Demand	Total	p.a.
a Jobs change	7,990	395
b Density factor (sq m total space per job)	11.4	
c Occupier demand (sq m) (a* b)	91,086	4,554
d Stock vacancy adjustment (sq m)	-9,765	
e Future vacancy factor (sq m)	-1,366	-68
f Net development demand (sq m) (c+d+e)	79,955	
g Replacing permitted losses (sq m)	128,939	
h Gross development demand (sq m) (f+g)	208,894	

Source: Stantec

Supply and market balance: baseline scenario 2019-34

Industrial space

2.60 Table 2.11 estimates the balance of demand and supply for industrial land over the plan period. Demand is taken from Table 2.5 above; we only show the higher of our two scenarios, Scenario A, because we believe it is the more reliable. Planned supply is made up of two elements:

- The pipeline of outstanding permissions for industrial development at 31st March 2019
- Estimated net additional floorspace to be delivered at proposed allocations in the emerging Local Plans.

Table 2.11 Demand-supply balance, industrial space, Hounslow 2019-34, Scenario A

Demand	Total	p.a.
a Jobs change	1,638	109
b Density factor (sq m occupied space per job)	77.0	
c Occupier demand (sq m) (a* b)	126,088	8,406
d Stock vacancy adjustment (sq m)	62,928	
e Future vacancy factor (sq m) (c * 8.1%)	10,213	681
f Net development demand (sq m) (c+d+e)	199,230	
g Replacing permitted losses (sq m)	53,554	
h Gross development demand (sq m) (f+g)	252,784	
Supply (all sq m)		
i Outstanding planning permissions	70,014	
j Airport Business Park, Hatton Cross	145,000	
k Other emerging site allocations	125,620	
l Total supply (sq m) (i+j+k+)	340,634	
Balance		
m Over (under) supply (sq m) (l-h)	87,850	

Source: Hounslow Borough Council, Stantec

- 2.61 Floorspace estimates for outstanding permissions and proposed allocations were estimated by the Council. These estimates relate to expected delivery over the plan period 2019-34; they exclude delivery at allocated sites which is expected to happen beyond the plan period. Site-by-site details are shown at Appendix D. We have not audited those figures. The largest proposed allocation by far is the Airport Business Park, in the Green Belt at Hatton Cross; we show this separately in the table to emphasise its size.
- 2.62 In addition to the above, the 2016 ELR suggested that around 50,000 sq m of net additional space could potentially be generated through intensification of industrial sites other than the emerging allocations shown in the table. In Chapter 3 of this update report we revisit this figure of 50,000 sq m and find that it is still reasonable. But the figure is uncertain; we cannot be certain how much of it, if any, will be delivered in practice over the plan period. Therefore we have not included it in the supply total at Table 2.8.
- 2.63 In total, the planned industrial supply is 340,634 sq m, against forecast demand of 252,784 sq m over the plan period. In strictly quantitative terms, if all that supply were delivered in full (and no existing space were lost over and above existing planning commitments) there would be a surplus of 87,850 sq m over the plan period.
- 2.64 Some of this surplus is likely to be absorbed by the growth of Media and Computing sectors. As discussed earlier, our forecast assumes that those businesses use office space; but in practice some of them – specifically small and medium occupiers – will be accommodated in light industrial spaces, or hybrid units that are suitable for either office or light industrial use. In the emerging GWC Local Plan, land allocations for this type of space ('flexible industrial units') are counted as part of the industrial supply.
- 2.65 It is also important to note that the forecast oversupply of industrial space is highly dependent on one large proposal – the Airport Business Park at Hatton Cross. If that site were not delivered, there would be a quantitative supply deficit of 57,150 sq m. There would be a major qualitative deficit, because as noted earlier the market for new space is largely driven by demand for high-quality distribution units near Heathrow, and Airport Business Park is the only site that would provide such space on any scale.

Office space

- 2.66 Table 2.12 shows the demand-supply balance for offices, following the same approach as the industrial analysis above. The estimated planned supply of land for office development comprises:
- Outstanding planning permissions, 37,422 sq m
 - Emerging plan allocations, 87,491 sq m.
- 2.67 Again the site-by-site detail behind these figures was provided by the Council, and we have not audited it. The site schedule is at Appendix E.

- 2.68 In total, the planned office supply is 124,913 sq m. In strictly quantitative terms, in the best-case scenario where all that supply is delivered (and no existing space is lost over and above existing planning commitments) there is a deficit of 60,750 sq m over the plan period.
- 2.69 As discussed earlier, in practice the supply deficit is likely to be smaller, because some of the jobs in Media and Computing will be accommodated in 'flexible industrial units' on sites that are counted as part of the industrial supply.
- 2.70 Regardless of this, the borough has a major qualitative deficit in office supply. This is because, as discussed earlier, the major element of demand is for high-quality corporate offices.
- 2.71 Both the qualitative and quantitative deficits could be filled by the proposed Heathrow Gateway Business Park, which would provide 115,000 sq m of high-quality offices. But Council officers have advised that the site is likely to be delivered after the end of the plan period, or at best in the final years of the period.

Table 2.12 Demand-supply balance, offices, Hounslow 2019-34

Demand	Total	p.a.
a Jobs change	5,921	395
b Density factor (sq m total space per job)	11.4	
c Occupier demand (sq m) (a* b)	67,502	4,500
d Stock vacancy adjustment (sq m)	-9,765	
e Future vacancy factor (sq m)	-1,013	-68
f Net development demand (sq m) (c+d+e)	56,724	
g Replacing permitted losses (sq m)	128,939	
h Gross development demand (sq m) (f+g)	185,663	
Supply (all sq m)		
i Outstanding planning permissions	37,422	
j Emerging site allocations	87,491	
k Total supply (sq m) (i+j)	124,913	
Balance		
l Over (under) supply (sq m) (m-h)	-60,750	

Source: Hounslow Borough Council, Stantec

Supply and market balance: baseline scenario 2019-39

2.72 As requested by the Council, we have also estimated the demand-supply balance for 2019-39. The results are in the tables below, for industrial space and offices respectively.

Table 2.13 Demand-supply balance, industrial space, Hounslow 2019-39

Demand		Total	p.a.
a	Jobs change	2,194	109
b	Density factor (sq m occupied space per job)	77.0	
c	Occupier demand (sq m) (a* b)	168,938	8,447
d	Stock vacancy adjustment (sq m)	62,928	
e	Future vacancy factor (sq m) (c * 8.1%)	13,684	684
f	Net development demand (sq m) (c+d+e)	245,550	
g	Replacing permitted losses (sq m)	53,554	
h	Gross development demand (sq m) (f+g)	299,104	
Supply (all sq m)			
i	Outstanding planning permissions	70,014	
j	Airport Business Park, Hatton Cross	145,000	
k	Other emerging site allocations	125,620	
l	Total supply (sq m) (i+j+k+)	340,634	
Balance			
m	Over (under) supply (sq m) (l-h)	41,530	

Source: Stantec

Table 2.14 Demand-supply balance, offices, Hounslow 2019-39

Demand		Total	p.a.
a	Jobs change	7,990	395
b	Density factor (sq m total space per job)	11.4	
c	Occupier demand (sq m) (a* b)	91,086	4,554
d	Stock vacancy adjustment (sq m)	-9,765	
e	Future vacancy factor (sq m)	-1,366	-68
f	Net development demand (sq m) (c+d+e)	79,955	
g	Replacing permitted losses (sq m)	128,939	
h	Gross development demand (sq m) (f+g)	208,894	
Supply (all sq m)			
i	Outstanding planning permissions	37,422	
j	Emerging site allocations	87,491	
k	Total supply (sq m) (i+j)	124,913	
Balance			
l	Over (under) supply (sq m) (m-h)	-83,980	

Source: Stantec

- 2.73 Strictly speaking, these demand-supply calculations do not compare like with like, because they show demand up to 2039, but planned supply only up to 2034. In effect, the tables assume that there is no further supply in the five years 2035-39. If there is such further supply, the tables will underestimate the oversupply for industrial space and overestimate the deficit for offices..

The impact of Heathrow expansion

Introduction

- 2.74 The 'business-as-usual' scenario discussed above includes future growth at Heathrow airport in line with past trends. We have also considered an alternative scenario, in which Heathrow gains a third runway. We call this 'third runway scenario' or 'Heathrow expansion scenario'. As original research on this would be far beyond the scope of our brief, we have based this scenario on existing studies. There are three such studies that offer relevant evidence, though none of them provide exactly what we need:

- The 2013 Parsons Brinckerhoff (PB) study⁶ was already referenced in the 2016 ELR. It forecasts the impact of Heathrow expansion on total jobs by local authority area, but it does not split the results into economic sectors. It is also relatively old.
- The Joint Evidence Base and Infrastructure Study (JEBIS), by Quod and Arup, was last updated in August 2019⁷. It forecasts the impact of Heathrow expansion by economic sector and local authority area, but it only includes jobs directly related to the airport ('direct jobs'), plus jobs created by the local spending of the employers providing direct jobs and their workforces ('indirect and induced jobs'). JEBIS does not consider other jobs which are attracted to the area by the presence of the airport ('catalytic jobs'), such as corporate headquarters.
- The 2019 Lichfields study⁸ forecasts the impact of expansion on employment land demand over 10 local authority areas, but does not split the results by local authority. There is nothing in the study to help us forecast demand in Hounslow. But we will use some of its qualitative findings in Chapter 3 below.

2.75 In this report our Heathrow expansion scenario is based on JEBIS and the PB study. We discuss these studies in turn below.

JEBIS

2.76 The JEBIS study provides forecasts of employment by sector with and without Heathrow expansion for the period 2018-41, modelled by Oxford Economics (OE). The latest version was issued in August 2019 (an update is currently in progress). To assess the impact of Heathrow expansion we have compared two of its scenarios:

- The baseline, which shows OE's view of a business-as-usual future
- The 'Heathrow Central Case', which adds jobs resulting from the proposed expansion of the airport.

2.77 The basis of the Heathrow Central Case scenario is a forecast of direct employment produced by Heathrow Airport Limited, to which OE have added indirect and induced jobs. As mentioned earlier, JEBIS does not forecast catalytic jobs, which it broadly defines as '*businesses who may choose to locate close to an expanded airport, but without a significant functional relationship to the airport*'.

2.78 The published findings of JEBIS cover a different period to our study and are not broken down by local authority area. But Quod has kindly shared with us a more

⁶ Parsons Brinckerhoff and Berkeley Hanover Consulting for London Borough of Hounslow, London Borough of Ealing & Slough Borough Council, Heathrow Employment Impact Study, December 2013

⁷ Quod and Arup for Heathrow Airport Limited and Heathrow Strategic Planning Group, Update Report, Joint Evidence Base and Infrastructure Study, August 2019 – Version 1.1

⁸ Lichfields for Heathrow Airport Limited (HAL), Heathrow Employment Land Forecasting Study, January 2019

detailed version, which shows employment change for Hounslow in the study period 2019-34. For this period, JEBIS shows total job growth in Hounslow as follows:

- Without Heathrow expansion (baseline), 19,600 jobs
- With Heathrow expansion, 'central scenario' 22,400 jobs⁹.

2.79 The employment impact of Heathrow expansion is the difference between these two figures, equal to 2,878 jobs. The table below shows the distribution of these additional jobs between economic sectors, as provided by JEBIS.

Table 2.15 Additional job growth resulting from Heathrow expansion, JEBIS, Hounslow 2019-34

	SIC	Change All jobs	Office Jobs	Industrial Jobs	Other Jobs
Agriculture, forestry and fishing	A	6	0	0	6
Mining and quarrying	B	54	0	0	54
Manufacturing	C	24	0	24	0
Utilities	D/E	4	0	3	0
Construction	F	23	0	12	11
Wholesale and retail trade; repair of motor vehicles	G	407	0	172	236
Transportation and storage	H	1,124	0	1,124	0
Accommodation and food service activities	I	252	0	0	252
Information and communication	J	103	96	0	7
Financial and insurance activities	K	23	23	0	0
Real estate activities	L	67	67	0	0
Professional, scientific and technical activities	M	89	85	0	4
Administrative and support service activities	N	281	127	8	146
Public administration and defence; compulsory social security	O	43	22	0	20
Education	P	111	0	0	111
Human health and social work activities	Q	157	0	0	157
Arts, entertainment and recreation	R	94	0	0	94
Other service activities	S	16	6	4	7
Total jobs		2,878	426	1,347	1,105

Source: Quod

⁹ This figure excludes 12,329 net additional jobs which are part of the Hounslow forecast, but Quod have advised belong in Hillingdon. The reason, as explained by Quod, is an error in official statistics, whereby the businesses that provide those jobs are recorded as being in Hounslow, while in fact they are in Hillingdon, within the airport boundary. We have excluded the 12,329 jobs from all our calculations.

- 2.80 The table also breaks down jobs by type of land use (industrial, office and other (non-B) uses). To produce this breakdown we have used the same method as for our main demand forecast (see para 2.9 onward), except for one adjustment: we have assumed that all the Transport & Storage jobs resulting from Heathrow expansion occupy industrial space.
- 2.81 This assumption has a large impact on our conclusions, as will become apparent later. The reason for it is that most of the additional Transport and Storage jobs in Hounslow are likely to be in logistics activities such as cargo handling and freight forwarding – as is suggested by our own local knowledge, and confirmed by the detailed qualitative analysis in the Lichfield report.
- 2.82 In reality we cannot know with any degree of certainty how the additional Transport & Storage jobs will be distributed between different kinds of space. Our assumption, that all of them need industrial floorspace, produces a maximum view of employment land demand. We make this assumption because, in the spirit of positive planning, our forecasts should err if anything on the positive side.
- 2.83 If the JEBIS forecast and our assumptions are correct, Heathrow expansion in 2019-34 will result in 2,878 net additional direct, indirect and induced jobs in Hounslow. Of those jobs, 426 will be in offices, 1,347 in industrial space and 1,105 in other (non-B) space.
- 2.84 Our study brief requires that we also consider the impact of Heathrow expansion in the longer term, to 2041. In the JEBIS forecast, taking this longer-term perspective does not change the answer, because after 2034 the project has no impact: the Heathrow Central Case does not show any additional job growth over and above the baseline. In our opinion, this is because the OE forecast expects that the project starts in 2019, and after 15 years its impact on jobs will have fully played out. The PB study took the same view on the duration of the impact, although it assumed an earlier start date, as discussed later.
- 2.85 In reality the Heathrow expansion project did not start in 2019, and it is unlikely to start for some years (if ever). Therefore, the JEBIS forecast cannot be taken literally in relation to 2019-34. But it does provide an indication of the overall impact of the project, which JEBIS expects to play out over 15 years.

The Parsons Brinckerhoff study

- 2.86 The PB study forecast in Heathrow-related jobs in Hillingdon, Hounslow and Slough in 2030. It provided a range of scenarios, of which two are of interest here:
- Scenario 1 (S1, base case) two runways at Heathrow, as now
 - Scenario 2: (S2, three runways at Heathrow (and no new runways at other airports)).
- 2.87 The difference between Scenario 2 and Scenario 1 is the forecast impact of Heathrow expansion.

- 2.88 In regard to timelines, the PB study assumed that the third runway would open in 2025/26, some 15 years after the base date of its forecast. The implication is that by the end date of the study, 2030, the bulk of the project's economic impacts would have played out, and the local economy would have reached a new equilibrium – so the 20 years of the PB forecast capture all or nearly all of the project's impact.
- 2.89 In reality, at the time of writing this report the expansion project has not started; we do not know if it will go ahead, and if so when. We use the PB forecast, as we did the JEBIS forecast in the last section, as an indication of the total impact of the project, over the whole 15 to 20-year period over which that impact will occur. How this period relates to Hounslow's plan period, would of course depend on when the project starts.
- 2.90 In relation to the present study, there is a problem with the PB forecasts: they relate to jobs held by residents of each local authority ('resident jobs'), whereas to forecast employment land demand we need to start from jobs physically located in each local authority ('workplace jobs'). In the 2016 ELR we made only a crude adjustment for this difference in definition. In this update we make a more sophisticated and more accurate adjustment. The table below shows PB's calculation step by step, together with the adjusted Stantec version. The narrative that follows comments on each successive row of the table. In the Stantec version, red type marks a change to PB's method.

Table 2.16 Heathrow-related jobs, PB and Stantec-adjusted, Hounslow, 2010 and 2030

Heathrow-related jobs	PB		Stantec	
	Resident jobs		Workplace jobs	
a Direct on -airport 2010	From surveys	10,760	None - airport is not in Hounslow	0
b Direct off-airport 2010	From surveys	1,082	Stantec estimate	7,700
c Indirect & induced 2010	(a+b) x 0.35	4,172	(a+b) x 0.35	2,723
d Direct, indirect and induced 2010	a+b+c	16,014	a+b+c	10,423
e Catalytic 2010	d x 1.1 x 1.2	20,093	d x 1.5 x 1.2	18,761
f Direct, indirect and induced 2030, S1 (no change)	d x 0.917	14,678	d x 0.917	9,557
g Catalytic 2030, S1	e x 0.76	15,347	e x 0.76	14,329
h Total, 2030, S1	f+g	30,025	f+g	23,887
i Direct, indirect and induced 2030, S2 (third runway)	d x 1.192	19,092	d x 1.192	12,426
j Catalytic 2030, S2	e x 1.59	31,940	e x 1.59	29,822
k Total, 2030, S2	i+ j	51,032	i+ j	42,248
l Impact of expansion - direct, indirect and induced	i-f	4,414	i-f	2,869
m Impact of expansion - catalytic	j-g	16,593	j-g	15,493
n Impact of expansion - total	k-h	21,007	k-h	18,361

Source: Parker Brinckerhoff, Stantec. Calculations look slightly inaccurate due to rounding.

2.91 In the table, rows a-f relate to PB's base year, 2010:

- At rows a and b, the PB study shows numbers of direct jobs held by residents of Hounslow (resident employment) at 2010, as estimated from surveys. We have replaced these numbers with estimates of jobs located in Hounslow (workplace jobs):
 - o On-airport there are no such jobs on-airport, because no part of the airport is in Hounslow (the whole site lies in the London Borough of Hillingdon).
 - o For direct jobs located off-airport, the PB only gives a total, which is 7,700 jobs. It does not split this total by location, but notes that 'the majority' of it is in Hounslow. In the absence of further information, we have assumed that *all* the 7,700 jobs are in Hounslow. Again, this is a maximum figure, or ceiling, which ensures that our forecast of employment land demand will err on the positive side.
 - o The outcome is that the Stantec scenario shows only 7,700 direct jobs, against some 12,000 direct jobs (on- and off-airport) in the PB version.

- Rows c and d add induced and indirect jobs, based on PB's multiplier of 0.35 (each direct job creates 0.35 induced and indirect jobs in the borough).
 - Row e shows catalytic jobs, which PB calculates in two steps:
 - o Catalytic jobs are 1.1 times the sum of direct, indirect and induced airport jobs
 - o Each catalytic job in turn creates 0.2 induced jobs in the borough.
 - In the above calculation, the catalytic multiplier of 1.1 relates to resident employment. The PB study also provides an alternative for workplace employment, which is 1.5. In the Stantec calculation we have used this higher multiplier (the reason why it is much higher is that many Heathrow-related jobs in Hounslow are filled by in-commuters from other local authorities).
 - Finally for 2010, row e shows the total Heathrow-related jobs. The PB total is some 51,000 and the Stantec total is lower at 42,000
- 2.92 Rows g-k show airport-related jobs at 2030, first in Scenario 1 (no change at Heathrow) and then in Scenario 2 (third runway built):
- To estimate direct, indirect and induced jobs in 2030, PB applies a change factor to the 2010 figure. In scenario 2, the factor is 0.917 – showing that jobs numbers are expected to fall, due to rising productivity. In Scenario 1, the factor is 1.192, as the positive impact of passenger numbers outweighs the negative impact of improving productivity.
 - To estimate catalytic jobs in 2030, PB applies a different set of change factors to the 2010 catalytic jobs. For Scenario 1 the factor is 0.76, as catalytic jobs fall, due to Heathrow's declining competitive position against other airports. For Scenario 2 the factor is 1.59, as the Heathrow gains competitive advantage due to the third runway.
 - In the Stantec scenario we apply the same factors to our 2010 figures.
- 2.93 Finally, rows l-n show the impact of airport expansion, which is the difference between Scenario 2 and Scenario 1. The Stantec scenario shows this impact, measured in workforce jobs, as follows:
- Direct, indirect and induced jobs 2,869 – virtually the same as the JEBIS figure of 2,878 jobs;
 - Catalytic jobs 15,493 jobs;
 - Total impact 18,361 jobs.

An integrated Heathrow scenario

- 2.94 To arrive at a final view of the employment impact of Heathrow expansion, we use both the sources discussed above:
- In relation to direct, indirect and induced jobs, JEBIS and PB (as adjusted by Stantec) show virtually the same number of total jobs. We use the JEBIS version, because unlike PB it is broken down by economic sector, and we need that breakdown to translate jobs into employment space.

- In relation to catalytic jobs we use PB, as adjusted by Stantec. No other source is available, as JEBIS does not cover catalytic jobs.

2.95 Before we translate those jobs into demand for employment space, we need to map economic sectors into land uses (types of space). In regard to direct, indirect and induced jobs, this mapping has been provided earlier (see Table 2.). For the catalytic category, we have assumed that the total is split between industry, offices and non-B uses in the same proportions as the job growth in our main forecast (see Table 2.2).

2.96 The table below shows the impact of Heathrow expansion on workplace jobs in Hounslow and translates it into demand for employment land.

Table 2.17 Impact of Heathrow expansion (third runway)

	Total	Office	Industrial	Other
Direct, indirect & induced jobs	2,878	426	1,347	1,105
Catalytic jobs	15,493	3,873	1,084	10,535
Total jobs	18,370	4,299	2,432	11,640
Density factor sq m per job		11.4	77.0	
Occupier demand, sq m		49,008	187,238	
Future vacancy factor		-735	15,166	
Development demand		48,273	202,404	

Source: Stantec

- 2.97 In this estimate, Heathrow expansion would:
- Add 48,273 sq m to the demand for office space
 - Add 202,404 sq m to the demand for industrial space.
- 2.98 As a reminder, the above figures do not relate to any specific time period. Rather, they estimate all or most of the total impact of Heathrow expansion - which JEBIS and PB expect to occur over a period of 15-20 years from the start of the project. How this relates to Hounslow's plan periods, would of course depend on when the project starts.
- 2.99 As a caveat, the above estimates are entirely dependent on the findings of JEBIS and the PB study. To verify those findings, or to make our own assessment of the impact of Heathrow expansion, would be far beyond the scope of our brief.

Summary

Industrial space

- 2.100 In relation to industrial space (including warehousing), we forecast the gross demand for development as some 253,000 sq m of floorspace¹⁰ over the plan period 2019-34. For the extended plan period 2019-39, the forecast demand is 299,000 sq m. These figures assume that no existing industrial space is lost in addition to the current pipeline of planning permissions.
- 2.101 Current planned supply for the period 2019-34, comprising outstanding permissions for industrial development and emerging Local Plan allocations, is given by the Council as 341,000 sq m. If that supply is delivered, and no existing industrial space is lost over and above existing planning commitments, there will be a surplus of 88,000 sq m over the plan period. Over the extended period 2019-39 the surplus will be 42,000 sq m, assuming that there is no further supply in 2035-39.
- 2.102 The above figures highly dependent on one large proposal – the Airport Business Park at Hatton Cross. If that site were not delivered, in 2019-34 there would be a supply deficit of 57,000 sq m over the plan period. There would also be a major qualitative deficit, because as the market for new space is driven by demand for high-quality distribution units near Heathrow, and Airport Business Park is the only site that would provide such space on any scale.
- 2.103 The ‘business-as-usual’ scenario discussed above includes future growth at Heathrow airport in line with past trends. In addition, we have considered employment land demand in an alternative scenario, in which Heathrow gains a third runway. Our figures rely on the findings of two earlier studies, JEBIS and the Parsons Brinckerhoff Heathrow Employment Impacts Study. Translated into demand for employment land, the findings of those studies suggest that the third runway would add 202,000 sq m to the demand for industrial space, in a once-for-all impact that would occur within 15-20 years from the start of the project.

Offices

- 2.104 For offices, we forecast the gross demand for development as 186,000 sq m of floorspace over the plan period 2019-34, and 209,000 sq m over the extended period 2019-39. This assumes that no existing office space is lost in addition to the current pipeline of planning permissions. Current planned supply, comprising outstanding permissions for industrial development and emerging Local Plan allocations, is given by the Council as 125,000 sq m. If that supply is delivered in full, and no existing space is lost over and above existing planning commitments, there will be a supply deficit of 61,000 sq m over the plan period. Over the extended period 2019-39 the supply deficit will be 84,000 sq m, assuming that there is no further supply in 2035-39. There will also be a major qualitative deficit,

¹⁰ In this concluding section numbers are rounded.

as the strongest demand is for high-quality 'corporate' offices on large-scale campuses similar to Chiswick Park and Bedfont Lakes, and none of the identified supply meets that description.

- 2.105 Both the qualitative and quantitative deficits could be removed by the proposed Heathrow Gateway Business Park, which would provide 115,000 sq m of high-quality offices. In the Site Allocations Document this scheme is shown as being delivered in 2024-34. But Council officers have advised that it is likely to be delivered after the plan period, or at best in the later years of the period, and therefore should not be included in our demand-supply calculation.
- 2.106 As with the industrial sector, the above forecast takes no account of the proposed expansion of Heathrow airport to provide a third runway. Again, we have estimated the impact of expansion on employment land demand, based on the JEBIS and Parker Brinckerhoff studies. The result is that the third runway would add 48,000 sq m to the demand for office space. Again, this would be a once-for-all impact and would occur within 15-20 years from the start of the project.

The Covid-19 pandemic

- 2.107 At the time of writing the UK and the world are profoundly disrupted by the coronavirus pandemic. It is too soon to predict the economic impact of the pandemic, and therefore the present study takes no account of it. Any disruption may be short term, so that over the plan period as a whole it does not make a significant difference to the demand for employment land.
- 2.108 If and when the Council updates the employment land review, it should not use 2020, as a base year for forecasting, because this will be a highly untypical year, due to the pandemic. Forecasts based on 2019, like the ones used in this report, will provide a better indication of long-term trends.

3 LAND SUPPLY: QUALITATIVE ASSESSMENT

Introduction

- 3.1 In this chapter we update and expand the qualitative site assessments in the 2016 ELR, focusing on the three tasks set out on page 1 above:
- i Verify, and if necessary update, the findings of the 2016 ELR about capacity for intensification at eight existing employment sites;
 - ii Assess the scope for additional intensification at a set of further sites that are proposed or being promoted for intensification;
 - iii Comment on some of the emerging new sites identified in the draft Local Plans, including commentary on strategic allocations and the strategy for industrial intensification.
- 3.2 The site assessments in the 2016 ELR still stand, unless modified by the text below.
- 3.3 The context to the update is that in the 2016 ELR we identified eight existing employment sites in the west of the borough, where we estimated that some 50,000 sq m could be added to the industrial stock. In the intervening years there has been pressure to plan for further industrial intensification, including from the emerging new London Plan, and further sites have been proposed for intensification both by the Council and the GLA. The GLA also proposes other changes to site-specific proposals the draft plan, including extension of policy designations so that more of the existing industrial stock is safeguarded from redevelopment for other uses.
- 3.4 Much of this proposed intensification is in the Great West Corridor (GWC) area, where the emerging Local Plan aims to encourage the growth of the creative, media and digital sector through an ambitious regeneration programme. The plan's proposals are informed by the sector research study produced by Regeneris for the Council in 2015. As these sites are part of a bespoke masterplan for the area, they are not included in our assessment of the potential for intensification - although we do discuss them in relation to policy changes suggested by the GLA. Our assessment of intensification potential covers a list of sites elsewhere in the borough, which the Council has asked us to consider.
- 3.5 In relation to the third question, in the closing section of this chapter we will comment briefly on the large-scale allocations proposed in the West of the Borough Local Plan.

Potential intensification sites

Overview

- 3.6 In this section we discuss both the sites proposed for intensification in the 2016 ELR and the new sites which the Council have asked us to consider. We also

comment on the GLA's proposals for intensification, new employment development and extending the Strategic Industrial Location (SIL) – which would not by itself produce additional industrial floorspace, but would protect existing floorspace from redevelopment for housing.

- 3.7 As context to inform our site appraisals, the next section we provide a general comment on the Heathrow-related office market, drawing on the Lichfields study of the impact of Heathrow expansion. In the following section we discuss individual sites. While in the 2016 ELR, site appraisals were in an appendix table. In this update we present them as narrative text in the main report. This is because we have more to say than can be fitted in a tabular format, and much of what we have to say is general comment that applies to more than one site.

The Heathrow-related office market

- 3.8 The Lichfields study breaks down the Heathrow office market into four segments, according to types of occupier:

On-airport to accommodate:

- Occupiers directly linked to the airport

Off-airport to accommodate:

- The airport's supply chain
- Small occupiers that need proximity to the airport;
- Large-scale international corporates that need proximity to the airport.

- 3.9 In practice almost all the firms identified by Lichfields fall into this last category of large-scale corporate users.
- 3.10 For Hounslow, looking to accommodate any demand flowing from the airport, it is important to note that Lichfields did not identify any significant airport-related clustering in the borough's town centres.
- 3.11 The Lichfield analysis failed to map a single large-scale international firm to property in Feltham town centre, and only one of around eight firms that the analysis suggested are located in Hounslow town centre (see Figure 6.4 of the report) were successfully matched to properties in Hounslow town centre.
- 3.12 The study also failed to match firms in most of the surrounding town centres - most obviously Staines. where not a single firm the statistics suggested should be located in the centre was correctly matched to a property.
- 3.13 The study did have more success in Richmond borough – with clusters successfully matched to property in Twickenham and Richmond town centres. This was also the case with Windsor town centre. Also, oddly given the lack of success in Staines, the study matched a cluster in Egham – possibly because it picked up a cluster of high-quality sites related to the M25 rather than Heathrow. It also matched clusters at Chiswick Park and the main Uxbridge estates.

- 3.14 We suspect that Lichfields' results are a fair reflection of reality. They confirm that Hounslow's town centres have failed to attract Heathrow-related demand, or more generally high-value occupiers. These firms do not locate in either Hounslow or Feltham town centres. But they do locate in town centres outside Hounslow, such as Richmond and Twickenham, and in business parks including Chiswick Park in Hounslow.
- 3.15 In relation to employment land policy, the implication is that the borough should not rely on town centres to accommodate Heathrow-related office demand on any scale. This applies to the business-as-usual scenario as well as the Heathrow scenario, and confirms the finding of the 2016 ELR, that the borough's town centres have modest prospects of attracting new office development in the plan period – see Appendix A below, paras 8-9, and 2016 ELR report, para 4.53, 4.74 and 4.13).
- 3.16 To attract significant office demand to Hounslow may require a different strategy. In our last report (2016) we noted that a critical mass would be needed, along the lines of Chiswick Park. We suggested this may be possible in the GWC. This is one of the few urban areas with the scale of potential land (and accessibility with proximity to a proven market) do secure this. But the Council decided against this for other planning reasons. Instead, the West of the Borough plan proposes to safeguard land for a new rail-connected business park, Heathrow Gateway, in the Green Belt. We return to discuss this site later.

East of the borough

The Great West Corridor

- 3.17 In their response to the Council's Regulation 19 consultation on the plan reviews, the GLA propose some site-specific changes to the draft policies, which we discuss below

Homebase, Syon Gate Business Park, Syon Clinic and 971 Great West Road [Area]

- 3.18 On the south-western edge of the Great West Corridor is an area of industrial and mixed retail uses between Homebase Syon Lane and the Carpetright (971 Great West Road) retail units to the east, known as the 'industrial strip'.
- 3.19 The GLA have suggested that the policy approach here should be revised and consideration should be given to extending the SIL, giving priority to industrial space over other uses.
- 3.20 From an employment policy perspective there is considerable force in the GLA's view. The western end of the GWC is still a significant industrial location, and this part of the Great West Road is not punctured by residential uses allowed under Permitted Development Rights. The decline of retail need may provide the incentive to redevelop these sites for new industrial uses, although obviously owners would prefer new housing.

- 3.21 The current uses in this area are either retail or industrial (except the clinic) and so there is no immediate conflict with a new designation for employment land. The Homebase store, although seemingly a retail use, has for many years also been in part employment use. The under-croft is used for car storage which we understand is related to the adjacent garage site.
- 3.22 We would add that the frontage to the Great West Road could encourage high density industrial redevelopment, along the lines of some of the multi-storey motor trade uses further east. This format of redevelopment would be in line with an industrial designation. Obviously any proposal would need to protect the amenity of neighbouring houses (and listed buildings) and so some industrial uses (e.g. waste) would not be permissible.
- 3.23 So from an employment land perspective in isolation there is merit in identifying a proportion of the parcel, particularly the sites with current industrial-type uses, as part of the SIL. But for the Homebase the Council is envisaging housing development, in the interest of wider place-making objectives.

Osterley Tesco

- 3.24 The GLA have also suggested that the SIL designation be extended to the Tesco store to the north of the Great West Road.
- 3.25 However, we consider that this site does not have the same potential as the cluster of sites east of Homebase (the Syon Gate Business Park, Syon Clinic and 971 Great West Road). This area fronts the Great West Road there is evidence that this type of frontage is advantageous to encourage redevelopment of industrial sites for new, more efficient and intensive industrial uses. Homebase is also closing, with the site proposed for redevelopment. This scenario does not apply to the Osterley site.
- 3.26 Also any redevelopment would need to accommodate the foodstore, with associated parking. Commercial uses alone are unlikely to provide the uplift in value to justify redevelopment. We are not aware of any relevant successful proposals where industrial has been developed on top of active retail foodstores.
- 3.27 Given the site's context, we think it unlikely that net additional industrial capacity can be delivered on the site. It may, subject to a residential led redevelopment, be possible to secure some new space. But this would need to be traditional industrial in character, as opposed to 'business units' for creative industries and very light industrial uses. This is because the nearby Gillette site, and other redevelopment sites in the GWC, will absorb the demand for this type of business space, offering a more attractive product than the Tesco site can.

West Cross / Harlequin Avenue area (including BSS)

- 3.28 The GLA have made a number of representations around the Council's proposals here. In summary, they object to proposals that introduce residential in the core SIL and to the proposed redevelopment of various smaller sites in the Harlequin avenue area for mixed use.

- 3.29 Again we suggest that in redeveloping the site existing space should be replaced on a like-for-like basis. This would partly answer the GLA's objections.
- 3.30 As regards introducing residential into the area, we understand this will be limited to those parcels that are not currently industrial. For West Cross, this includes the office units fronting the GWC – which in turn would cross-subsidise the intensification of the West Cross site to the rear.

Other sites in the GWC

- 3.31 There are two other possible sites in the GWC that could deliver net additional space and have been suggested by the GLA for new industrial development.
- 3.32 The first such site B&Q / NatWest. Our comments on Homebase apply to it also. The site is highly visible and also separated from residential uses, making it suitable for a new industrial use. But the site is still in active retail use, although the unit is closing. Without residential development and the resulting cross-subsidy, redevelopment for industrial use may not be viable, as the landowner would realise greater value by retaining the site in retail use. On the B& Q site, the Council envisages car showrooms on part of the site, as well as a hotel and housing as part of the wider place-making agenda around the new stadium for Brentford FC.
- 3.33 At the second site, Power Road, the Council has identified additional capacity, although the only genuine net additional relates to the infilling at 110 Power Road (the LSIS is to be extended to cover 632 Chiswick Road although this will not deliver net additional space). The site is part of the Creative Enterprise Zone and we understand that the Council's intention is to change the character of the site, from mainstream industrial towards more studio and creative space, in line with the Council's aspirations for creative industries.
- 3.34 In the previous ELR we suggested that a portion of the Power Road LSIS could be a suitable location for a greater share of offices, but we also noted that the estate was home to a successful mix of light industrial uses (para 5.51 of the 2016 study), including some businesses from the creative industries. We stated that the loss of light industrial businesses in B1c/B2 space should be minimised. This assessment still stands, and our view is that the LSIS designation is still appropriate. A risk at this location is that it will attract offices uses, which are in great demand and command high values in this part of the borough. Policy should be framed carefully to prevent this.

Other sites

- 3.35 The Council has asked us to comment on potential for intensification at a number of sites in Brentford and Isleworth.
- 3.36 As a general comment, both the Isleworth and Brentford sites are close to industrial sites proposed for intensification in the GWC. Redevelopment of these sites will displace traditional industrial occupiers, certainly in the construction phase, and also permanently if some of the traditional industrial space in the

GWC is replaced with ‘business units’, many of them on upper floors. The capacity of the market to absorb such units is untested, and it may not be viable to deliver without cross-subsidy from housing development. Insofar creatives and other light industrial occupiers do generate demand for ‘business units’, the masterplanned and comprehensively regenerated GWC will be more attractive to them than competing sites in Isleworth or Brentford.

- 3.37 Therefore, employment sites in Isleworth and Brentford should be for mainstream industrial property rather than ‘business units’, at least until the market impact of GWC regeneration has become clear. Such industrial property would provide alternative locations for industrial firms, and would not compete with the GWC for ‘business unit’ demand.
- 3.38 It is also important to note that the Isleworth sites, and to a lesser extent to Brentford sites, are likely to attract overspill demand from the neighbouring borough of Richmond – which has almost no industrial land supply of its own and cannot meet economic needs, as recognised in its adopted Local Plan. This strengthens the case for providing additional industrial capacity in this area.

Isleworth

- 3.39 Isleworth accommodates a number of ‘traditional’ employment sites, including Clocktower Road, Twickenham Trading Estate, Fleming Way, Metro Industrial Estate (St Johns Road), Wood Lane and some remaining industrial units along London Road. Sites in the south of the area still retain industrial critical mass.
- 3.40 Clocktower Road (ELR 42) seems to be a successful estate, with recent evidence of investment and renewal. In the main, only the more constrained units, to the very rear of the site, remain to be redeveloped. Given the proximity of residential immediately behind these units, we do not think these units can be intensified, because intensification means taller buildings. Therefore it does not seem sensible to expect further intensification at this site.
- 3.41 Fleming Way has not been redeveloped, but remains an important and functionally efficient industrial area. It fulfils a useful role and should be retained for industry, but like the other sites in Isleworth we consider it does not have potential for intensification, because there is unlikely to be demand for space on upper floors.
- 3.42 The Twickenham Trading Estate (ELR 1021) is similar, although in terms of plot ratio many of the units are already nearly 100% - especially those to the rear, furthest away from the stadium. Given the very high plot ratio, it is not credible to expect further intensification. If the units are redeveloped, we would expect a more efficient layout, with greater yardage. Also part of the site is used as a bus depot – a use that is very difficult re-accommodate viably as part of any intensification proposal.
- 3.43 Metro Way (ELR 1009) lacks significant critical mass and is located in the largely residential area. If it is redeveloped, policy should require like-for-like

replacement, to provide mainstream industrial units as opposed to ‘business space’. We do not expect intensification there,

- 3.44 Wood Lane (ELR 1010) – is now a fragmented site, with little or no ‘industrial’ cohesion. If it is redeveloped, realistically we would not expect intensification there, because as discussed earlier there will likely be no demand for lighter uses on upper floor.
- 3.45 Finally, in Isleworth we have been asked to consider scope of the intensification of the remaining sites along London Road (numbers 575-579, ELR 1008). Almost all the industrial stock has been lost in this area. The reason why this property remains may be that it is used for motor trade and repair, and if these uses were displaced they would find it difficult to find alternative accommodation. These uses provide useful services to the local population, and therefore should be afforded some protection. But we do not see any prospect for intensification, for the same reasons discussed above: intensification can only be achieved by providing upper floors, and this type of space is unlikely to be in demand or viable in the area.

Brentford

- 3.46 The Council have asked us to consider possible intensification sites in Brentford. These are the current Heidelberg site in the town centre, the Brentford bus depot and the Brentwaters Business Park.
- 3.47 The Heidelberg site (ELR 1015) is a long-standing, single-user property and a legacy of Brentford’s industrial past, which has largely been lost. It is a town centre site, surrounded by regeneration proposals for new housing. Therefore, if it does come forward for redevelopment, it would be difficult to make a case for seeking re-provision or intensification of industrial space. In physical terms the site may be suitable for office development., but this is unlikely to be in demand, nor is there a policy case for it.
- 3.48 The Bus Depot (ELR 1033) site is in operational use. We also understand that developing above the depot would be structurally complex, and possibly only viable for residential mixed use. To determine if this is true would need more detailed assessment, beyond the scope of this study. The alternative way to provide industrial space on the site would be to relocate the bus depot. But it is notoriously difficult to find sites for this type of use.
- 3.49 The Brentwaters site rises different policy issues. It is a constrained site which now lacks critical mass. But it remains in demand for service industries including garages and car washes etc. Within the site constraints we don’t see intensification potential for industrial uses. Nor is there a case for promoting new office space here. If it were redeveloped, the most likely outcome would be like-for-like replacement of the existing units. Even then, some existing uses (scrap metal and waste) are likely to be bad neighbours, and we question whether they should be re-accommodated in this location.

West of the borough

Overview

- 3.50 In the 2016 ER we concluded that the main route to industrial intensification was via redevelopment to provide larger, taller units that do not increase the building footprint, but can accommodate additional floorspace in mezzanine floors:
- ‘The opportunities for intensification follow on the trend of redeveloping areas of older less efficient stock with larger more efficient buildings, many involving mezzanines. Our market analysis suggests that such redevelopment is financially viable – due to the exceptionally high demand and tight supply for these uses in Hounslow’ (paragraph 5.91).’*
- 3.51 We identified eight sites for this type of intensification in the west of the borough. The largest of those sites was North Feltham, followed by the Lawrence & Fairway Estate and Stanwell Road. Together these three sites formed the bulk of the 50,000 sq m of additional industrial space that we estimated could be created through intensification.
- 3.52 Each area was selected because it still accommodated a share of older property which were considered likely to be redeveloped over the life the Local Plan. This redevelopment was likely to take the form of taller units, with scope for mezzanine floors, which would produce additional floorspace. At the time of the ELR there was market evidence of this type of regeneration already occurring on, or close to, each of the three sites.
- 3.53 We consider that this view of intensification is remains valid. We have seen no evidence that would contradict it, and it is supported by SEGRO, probably the largest owner of industrial stock in Hounslow. In their recent representations to the recent London Plan examination, SEGRO noted ‘key trends’ in the Industrial Market that were related to how efficiently commercial property can be used. Key this was taller buildings (10-12m) with stronger floorplates, to facilitate the additional loading. They also noted that a yard depth of 40-50 m was needed to facilitate the associated servicing of these units. Key to their Matter Statement was that there was no link between the built floorspace of an industrial scheme and how efficiently it could be used. They also dismissed multi floor warehousing as being a sound route to meet London’s needs; partly by citing the GLA’s own evidence that showed this format was not viable. So, like the ELR, this would suggest a very cautious view should be taken around the scope to intensify the borough’s sites with a focus on net additional floorspace gained.
- 3.54 However, since the ELR was completed the GLA has published documents, including the draft new London Plan and the 2017 Industrial Intensification Primer, that promoted different a different kind of intensification. The relevant sections of the London Plan are no longer current, as they were deleted by the Secretary of State on 13th March 2020. But the GLA model of intensification is still promoted in the Industrial Intensification Primer. The document favours multi-storey buildings, which may be multi-deck warehouses modelled on X2 at Hatton

Cross, or standard industrial units with smaller workshops / business units / studios above, for the use of very light industrial activities with smaller servicing requirements.

- 3.55 SEGRO in their representations on the London Plan dismissed the GLA's model of intensification, quoting evidence from the GLA itself which shows that this format was not viable. Indeed the GLA's Industrial intensification and Co-location Study finds that intensification through multi-storey buildings is almost universally unviable, unless it is supported by public money or cross-subsidised by housing development. Neither of these solutions are available for the industrial areas in the west of Hounslow, as no public money is available, and the major industrial sites are not suitable for housing. Therefore intensification of those sites on the GLA model is unlikely to be feasible.
- 3.56 In our experience, one reason why multi-storey space is difficult to deliver is that it may be unpopular with occupiers. For many businesses it is less efficient and more costly, especially when goods lifts or ramps are required – operating a goods lift, as opposed to a single floor format, is much more labour intensive and so costly to operate. This additional operational cost means that occupiers may need to look for a reduced rent (compared to their former property) to remain commercially viable and competitive.
- 3.57 In summary, in the West of the Borough the stock is already reasonably modern, and the 'Heathrow bubble' has already led to market led regeneration of the estates. This intensification does not generally yield significant gains in floorspace, because, to use space more efficiently, developers and owners tend to prefer higher property which includes provision for higher racking and/or mezzanine floors. Regeneration may result in a poorer plot ratio', because more yardage is needed to service this property. There is no viable scope to intensify existing estates through multi-decked warehousing. Rather, the feasible way to create more industrial space in those areas is through market-led redevelopment, creating larger, taller, more efficient buildings with the potential for mezzanines. In our view this form of redevelopment should be encouraged.
- 3.58 Planning policy in the borough should endeavour to meet the industry's needs, enabling it to operate as effectively as efficiently as possible. The importance of this is stressed in the newly revised National Planning Practice Guidance, where para 031¹¹ stresses the critical role of logistics in the national economy and encourages planning authorities to '*engage with logistics developers and occupiers to understand the changing nature of requirements in terms of the type, size and location of facilities, including the impact of new and emerging technologies*'.

¹¹ Reference ID: 2a-031-20190722

Hanworth

- 3.59 We have been asked to comment on intensification potential at four sites in Hanworth, none of which were identified in the ELR.
- 3.60 The Griffin Centre is located to the South of the North Feltham Industrial Area, although takes its access from Staines Road. This is a site where we may expect continued market-led renewal, replacing the existing stock with taller, modern units, as discussed in the overview section above.
- 3.61 The Wickes site forms the corner of the Hanworth Trading Estate (site 21&22 in the 2016 ELR). As with the retail units in the GWC area, we assume these have been excluded from previous site boundaries because the primary use is a retail as opposed to industrial one (the site appears to include PC World). It is possible the sites will be redeveloped, and there would merit in extending the adjacent employment designation to include these sites to cover this possibility. But we are not aware of active redevelopment proposals, and both retail units are in use.
- 3.62 The adjacent industrial estate (Site 21& 22 in the ELR) have only recently been subject to significant redevelopment and renewal. To expect redevelopment would not be realistic, because it would mean replacing new, fit-for-purpose units, and there is no incentive for the owners to do this. Intensification through adding extra floors would be physically possible, but demand for this type of space is untested in this location, and in our view would not be sufficient to support viable development.
- 3.63 The same applies to the Hampton Farm estate (1025 in the ELR), which is a modern development of purpose-built light industrial and trade counter units, including some newly built units.

Cranford

- 3.64 The same comments apply the cluster of estates to the north of Feltham, around Cranford. (sites 30-39 of the ELR). It would not be sensible, for example, to suggest that the new Asda distribution unit at Parkway can or should be intensified via a plan policy. Nor can we expect that airport-related logistics sites (e.g. Alpha LSG or the DHL Heathrow Hub) will be redeveloped and intensified, given that the GLA's own evidence shows multi-decked warehousing is unviable,
- 3.65 Instead, continued market led regeneration for newer larger industrial units should be encouraged in line with market evidence and demand in this part of the Borough. An example is ELR site 39 (Bullsbridge), where some older property remains. It is likely that there will be market-led redevelopment of some of these older units.

Feltham

- 3.66 As noted earlier, the ELR noted scope for market led intensification at a number of older sites in and around Feltham. We estimated that this could produce some 50,000 sq m of additional industrial space. Below, we consider intensification

potential at a series of further sites in Feltham, put to us by the Council. All are modern logistics sites close to Heathrow.

- 3.67 Starting with ELR site 11 (Cargo Service Centre), this is located south of the airport and accommodates a number of airport-related firms including DNATA (which has just been extended) and the airport fuel farm. It includes open land that looks vacant and may suggest that there is scope for intensification. But in reality the land used for operational airport uses including the fuel trucks and airport shuttle buses. It may be possible to accommodate these in multi-storey facilities. But, if policy required this, we question whether it would be delivered. Given that no one is promoting such intensification to the Council, there is no reasonable prospect of it being delivered.
- 3.68 ELR site 12 (Ascot Road Industrial Estate) as we understand it is currently under construction for a new logistics scheme, with further phases to follow. Rather than a candidate for policy-led intensification, it is a further example of market-led, deliverable industrial development in this area.
- 3.69 ELR 14&15 (Challenge Road) is of a slightly different type to most industrial sites in the area. The site is constrained and too narrow to accommodate larger logistics units. It is also surrounded by HMYOI Feltham and the Green Belt. While there is scope for intensification, with the site not very 'dense', it is questionable that demand exists in this location to motivate redevelopment and possible intensification onto upper floors. Nor would the site be suitable for residential led mixed use.
- 3.70 In relation to Jubilee Mail Centre (ELR 23), we do not understand the rationale for considering intensification. It is a modern depot and fully operational. We understand that Royal Mail continue to invest in the site. Even if it were possible to accommodate more space on this site, we do not think that this would be viable or in the Royal Mail's interest.
- 3.71 ELR site 25, the former Gate Gourmet site to the south of the airport, has only just been redeveloped for a new unit, as has ELR site 26 (Vantage Park) to the East. Both redevelopments follow the market viable format for this area – larger, taller buildings, but not 'intensified' as per the GLA's approach. Again we do not see any reasonable prospect of the site coming forward for another redevelopment.
- 3.72 Over the plan period we may expect this renewal to continue into the nearby estates to the North, which comprise ELR 27 – Cranebank Industrial. The older units there may be replaced by newer taller building. Because this site already has a very high plot ratio, renewal may reduce the footprint of the current units.
- 3.73 ELR site 29 (Beavers Lane Camp North) is also a newly completed scheme, by Prologis Park, which makes further redevelopment in the plan period very unlikely.
- 3.74 We have also been asked to consider Central Park East (part of ELR 1031). This is also a site we would expect to see continued investment and renewal. But this

would not produce additional footprint or multi-storey building. Rather, the demand is likely to be for newer, taller buildings, with more scope for mezzanine floors, in line with market demand in this part of the Borough.

- 3.75 In the same broad area; but on a different type of site, redevelopment of the current office and retail site (Tesco) at Dukes Green Avenue (ELR 1030) has been suggested. For this site we would question the commercial motivation to redevelop for industry. Redevelopment of retail is only likely to be viable and commercially attractive in return for new homes. The office buildings don't appear to be life expired and is largely in use by the Court Service.
- 3.76 The Maple Estate (part of the larger ELR 16-20) is much smaller and of very different character. It is another purpose-built, local quality industrial estate, similar to Heston Mall and Metro Estate in Isleworth. It accommodates a number of small units although at a lower plot ratio compared to the Heston Mall. The low profile of the development is likely due to the presence of the housing to the rear. However this is one of the very few parcels we can see merit in redeveloping to make more efficient use of the land – but as with other sites we don't see the merit in exchanging industrial space on ground floors with a different commercial product on upper floors – so any redevelopment is unlikely to make a meaningful contribution to the employment floorspace portfolio.
- 3.77 ELR 1001 (The National Works) is closer to Hounslow than Feltham. The ELR suggested no scope for intensification, which remains the case. The site is highly constrained and not one we could see being intensified in any way even were this feasible. It forms a useful part of the local land supply, accommodating various industrial services (trade counters) in a part of the Borough with little alternative supply.
- 3.78 The proposed extension to Central Park Trading Estate has a land area of 4.1 ha, but we understand that its development capacity is only 9,600 sq m, because part of it is used for car parking, and there are a number of Tree Preservation Orders. The parking is needed to support nearby employment units. The surrounding area is mixed, with some local quality units including building supplies and local manufacturing firms. But there is also evidence of Heathrow-related demand, with large modern warehouses further along Green Lane to the rear. If the site is allocated, it is likely to be attractive to the market and readily taken up. Given that other sites in this area will mostly provide large warehouses, there is merit in looking to this site to meet the demand for smaller units.

Heston

- 3.79 We have been asked to consider potential to intensify the Heston Mall site in the village centre ((ELR 1006). This is another local quality industrial site. It has not attracted significant demand from the motor trade, probably due to its high plot ration and limited yardage and parking. Only very light vehicles can access the industrial units.

- 3.80 Industrial intensification of the site is unlikely to be possible, due to its already high plot ratio and poor access. As with other sites in the area, intensification would only be possible on upper floors and we doubt there is sufficient demand to support this. If the site is redeveloped, policy should require like-for-like replacement of the existing floorspace.
- 3.81 The 14.35 ha proposed allocation south of Western International Market is firmly within the Heathrow market area, as demonstrated by the presence of the wholesale market itself. It is a large, highly accessible site, free of constraints from nearby residential uses, and will be attractive to airport-related demand. We understand that mineral working may limit the development potential in this plan round and the Council estimates only 15,800 sqm could be provided in the plan period.

Sites from the London SHLAA

- 3.82 The Council has asked us to comment on the intensification potential of sites identified in the Mayor's Strategic Housing Land Availability Assessment (SHLAA) as potentially suitable to be redeveloped for employment uses. The Mayor's SHLAA identifies 11 additional sites, not covered by our assessment above, as follows:
- i TW14 8NB (451/1012)
 - ii Reynard Mills Windmill Road (484/1014)
 - iii 37 Rugby Road – Royal Mail Delivery (404 -1021)
 - iv Hogarth Business Park Burlington Lane (474/1028)
 - v Site at Lion Way (386/NEW)
 - vi Swan House Swan Road (40/NEW)
 - vii Brickfield Close (425/NEW)
 - viii Heathrow House (429/NEW)
 - ix Fairfields Road (430/NEW)
 - x Tele Europe Ltd (446/NEW)
 - xi TW13 4RD (447/NEW)
- 3.83 The largest have already been developed for housing or new employment space (Hogarth Business Estate (Ref: 474), Reynard Mills (484) and Heathrow House (429). Therefore they are very unlikely to be redeveloped again in the foreseeable future.
- 3.84 The former Royal Mail Depot at Rugby Road Isleworth (404) forms part of a larger employment area (Twickenham Trading Estate), which is already intensively built out, and constrained by residential property to the side and rear. The former Royal Mail building is currently let to a self-storage operator, though it may have been vacant when the SHLAA was undertaken. We understand that open land here is let for events related to the adjacent stadium. It is highly unlikely that any redevelopment would yield new employment space.

- 3.85 GLA Site TW13 4RD appears to be occupied by a small self-drive / car hire company (Ryder). We assume this site was included in the SHLAA because it looks underused. But this is misleading, because the occupier needs open land to store vehicles. It would not be realistically feasible to intensify the site while retaining the necessary parking.
- 3.86 Brickfield Close (425) appears to be two modern out of centre retail units, let to Majestic Wine and Pets at Home. They may have been picked out in the SHLAA because on superficial inspection they look like industrial unit. There is no realistic prospect of the site being redeveloped for employment.
- 3.87 TW14 8NB (451/1012) is a major electrical substation, adjacent to the Stanwell Road estate (also known as Great South West Road, SAC ID 434/ ELR 2016 Ref 1012). The Stanwell Road estate was suggested for intensification in the 2016 ELR, as noted in para 3.50 above. The substation appears to be in use, and hence not available for an alternative use at present. The site is very long and thin, with residential uses to the side and rear. Therefore, even if the substation were decommissioned, it would be difficult to redevelop for employment, unless it is combined with the Stanwell Road estate.
- 3.88 The remaining sites identified by the GLA are small town centre plots. None of them are likely to be intensified for employment, because, as discussed earlier, offices in Hounslow's town centres are in low demand and unlikely to compete successfully with new space at the GWC nearby. The Swan Way building is in a residential area and most likely to be redeveloped for housing, probably with PDR as a fallback.

Strategic development sites

- 3.89 In this final section we comment briefly on qualitative features of three major Green Belt releases proposed in the emerging West of Borough Local Plan. Two of these sites, Airport Business Park and the smaller and at Dick Turpin Way, are proposed for industrial development. The third, Heathrow Gateway, is for offices.

Airport Business Park

- 3.90 This a proposal for a new industrial Airport Business Park – located to the South of Hatton Cross. This is justified to meet the borough's needs and particularly the demand related to Heathrow, which that cannot be accommodated elsewhere.
- 3.91 The site is 96 ha and the draft allocation for 145,000 sqm of industrial floorspace as a minimum.
- 3.92 The site is clearly well located and there are no questions about its suitability as an employment site to help service Heathrow.
- 3.93 While this site has a clear Green Belt policy 'bar' to pass, we suggest that if the GLA is to be successful in encouraging a new generation of multi-decked warehouses this is most likely to be achieved on new sites such as this.

- 3.94 Given this is a largely unconstrained site, located in one of strongest industrial markets in the UK, the Council may wish to consider a formal requirement for multi decked warehousing to be promoted on the site. As a new allocation, seeking very special circumstances to be released from the Green Belt, the site may lend itself to a more aspirational policy approach than would be possible elsewhere.
- 3.95 For reasons outlined earlier, we would still be cautious about expecting this outcome. So far here is no evidence that this is a viable format – a fact well recognised by those making representations to the London Plan. Without such evidence, policy cannot require this format as a default option.
- 3.96 But here we have a specific site, at the crux of one of the highest areas of market demand for logistics space. If the GLA is to be successful in delivering multi decked warehousing, it will be in a location such as this. Therefore we think it sensible that the policy at least require that this format be fully tested before permitting alternative formats. This could be required as part of the masterplanned approach already promoted in the emerging plan policy.

Land at Dick Turpin Way

- 3.97 This is a much smaller site, adjacent to Heathrow. Much of the commentary relating to the Airport Business park applies to it equally.
- 3.98 There is no doubt that the site is well located and commercially attractive. As a Green Belt release a similar policy as we discussed above may be justified. This would require developers the promoters to test a more intensive use of the land than might otherwise be considered.

Heathrow Gateway

- 3.99 This is a significant proposed release, identified in the emerging Local Plan for 115,000 sqm of office space to the north of Bedfont Lakes. In our 2016 ELR this was seen largely as an industrial area but has since been promoted more as an office park with a much larger quantum of office floorspace. This may be because rail proposals, including a new station have become more advanced and offices are better capable of benefiting from the rail connection. In the draft plan Heathrow Gateway is not allocated, but treated as a reserve site, because its delivery is dependent on delivery of the rail link.
- 3.100 With a new rail station, the rationale for allocating the site is compelling. This is a highly attractive site, and with a rail connection it will be a sustainable location. There is no disagreement that there is some very localised demand from firms who wish located on the airport 'doorstep', and the borough ought to be able to share in some of the office demand the airport generates. As a mixed use, office and residential site it is well placed to provide Heathrow-related opportunities for Hounslow residents without the need to travel into Zone 1 or 2.
- 3.101 However, as regards the indicative masterplan, the proposals are to locate the offices away from the station – on the edges of the site. This is probably the

wrong way around if the site is being promoted because of its economic links to the airport. Also; the office space proposed is capable of employing over 10,000 workers and the homes only 4,000 or so workers (not all will work on the site). There is therefore a strong logic in locating the offices around the station to make them as attractive to the rail connected workforce as possible and also provide better access to the airport. Such an arrangement can only strengthen the 'special circumstances' case to the release the site from the Green Belt – there are few (If any) other options around Heathrow where an office park can be delivered with such good public transport accessibility both the airport and the borough's labour supply.

Summary

- 3.102 In this chapter, our first task was to verify, and if necessary update, the findings of the 2016 ELR about capacity for intensification at eight existing employment sites. We have confirmed this earlier finding, which estimated that there was potential for intensification to produce some 50,000 sq m of additional industrial floorspace through intensification, mainly at three large sites in the west of the borough. We have also considered the form that intensification would take, and concluded that multi-storey redevelopment, as promoted by the GA, does not have reasonable prospects of delivery on any scale. Instead, the opportunities are for market-led intensification, resulting in larger, taller buildings with potential for mezzanines. This type of intensification matches the particular market circumstances in Hounslow, and it aligns the advice in the new planning guidance, that planning authorities should respond to the specific requirements of the distribution sector.
- 3.103 Our second task was to consider a list of sites provided by the Council and assess if they had potential for intensification. We have looked at those sites on the list in detail and have concluded that they are unlikely to deliver significant additional floorspace, sometimes because they are not physically suitable, but mostly because there are no reasonable prospects that owners or promoters would have any incentive to intensify them. In relation to intensification strategy generally, we have also advised that outside the GWC industrial redevelopment should be encouraged to provide like-for-like replacement of standard industrial units, as opposed to multi-storey 'business units' – which are unlikely to be viable or in demand, partly because they would compete for occupiers with more attractive opportunities created by the masterplanned regeneration of the GWC.
- 3.104 Thirdly and finally, we have commented on three proposed strategic allocations in the Green Belt – the office park at Heathrow Gateway and industrial schemes at Airport Business Park and Land at Dick Turpin Way. In our opinion all three sites are very suitable for their proposed uses and will be attractive to the market. For Heathrow Gateway, we have suggested changes in layout to make the new offices more accessible to the station. For Airport Business Park and Dick Turpin Way, we have suggested that policy should require new warehouses to be multi-

storey, subject to market testing. If the GLA is to be successful in delivering multi-decked warehousing, it will be in a location such as this. Therefore we think it sensible that the policy at least require that this format be fully tested before permitting alternative formats.

4 SUMMARY

- 4.1 This study was commissioned to review the previous Employment Land Review to assess whether it was still relevant and up to date. It focuses on two main questions, firstly the quantitative balance of demand and supply for employment land, and secondly qualitative assessment of sites proposed for new development or intensification / redevelopment. Below, we address these questions in turn.

Demand and supply: quantitative assessment

Industrial space

- 4.2 In relation to industrial space (including warehousing), we forecast the gross demand for development as some 253,000 sq m of floorspace¹² over the plan period 2019-34. For the extended plan period 2019-39, the forecast demand is 299,000 sq m. These figures assume that no existing industrial space is lost in addition to the current pipeline of planning permissions.
- 4.3 Current planned supply for the period 2019-34, comprising outstanding permissions for industrial development and emerging Local Plan allocations, is given by the Council as 341,000 sq m. If that supply is delivered, and no existing industrial space is lost over and above existing planning commitments, there will be a surplus of 88,000 sq m over the plan period. Over the extended period 2019-39 the surplus will be 42,000 sq m, assuming that there is no further supply in 2035-39.
- 4.4 The above figures highly dependent on one large proposal – the Airport Business Park at Hatton Cross. If that site were not delivered, there would be a supply deficit of 57,000 sq m over the plan period. There would also be a major qualitative deficit, because as the market for new space is driven by demand for high-quality distribution units near Heathrow, and Airport Business Park is the only site that would provide such space on any scale.
- 4.5 The ‘business-as-usual’ scenario discussed above includes future growth at Heathrow airport in line with past trends. In addition, we have considered employment land demand in an alternative scenario, in which Heathrow gains a third runway. Our figures rely on the findings of two earlier studies, JEBIS and the Parsons Brinckerhoff Heathrow Employment Impacts Study. Translated into demand for employment land, the findings of those studies suggest that the third runway would add 202,000 sq m to the demand for industrial space, in a once-for all impact that would occur within 15-20 years from the start of the project.

¹² In this concluding section numbers are rounded.

Offices

- 4.6 For offices, we forecast the gross demand for development as 186,000 sq m of floorspace over the plan period 2019-34, and 209,000 sq m over the extended period 2019-39. This assumes that no existing office space is lost in addition to the current pipeline of planning permissions. Current planned supply, comprising outstanding permissions for industrial development and emerging Local Plan allocations, is given by the Council as 125,000 sq m. If that supply is delivered in full, and no existing space is lost over and above existing planning commitments, there will be a supply deficit of 61,000 sq m over the plan period. Over the extended period 2019-39 the supply deficit will be 84,000 sq m, assuming that there is no further supply in 2035-39. There will also be a major qualitative deficit, as the strongest demand is for high-quality 'corporate' offices on large-scale campuses similar to Chiswick Park and Bedfont Lakes, and none of the identified supply meets that description.
- 4.7 Both the qualitative and quantitative deficits could be removed by the proposed Heathrow Gateway Business Park, which would provide 115,000 sq m of high-quality offices. In the Site Allocations Document this scheme is shown as being delivered in 2024-34. But Council officers have advised that it is likely to be delivered after the plan period, or at best in the later years of the period, and therefore should not be included in our demand-supply calculation.
- 4.8 As with the industrial sector, the above forecast takes no account of the proposed expansion of Heathrow airport to provide a third runway. Again, we have estimated the impact of expansion on employment land demand, based on the JEBIS and Parker Brinckerhoff studies. The result is that the third runway would add 48,000 sq m to the demand for office space. Again, this would be a once-for-all impact and would occur within 15-20 years from the start of the project.

Land supply: qualitative assessment

- 4.9 Under this heading, our first task was to verify, and if necessary update, the findings of the 2016 ELR about capacity for intensification at eight existing employment sites. We have confirmed this earlier finding, which estimated that there was potential for intensification to produce some 50,000 sq m of additional industrial floorspace through intensification, mainly at three large sites in the west of the borough. We have also considered the form that intensification would take, and concluded that multi-storey redevelopment, as promoted by the GA, does not have reasonable prospects of delivery on any scale. Instead, the opportunities are for market-led intensification, resulting in larger, taller buildings with potential for mezzanines. This type of intensification matches the particular market circumstances in Hounslow, and it aligns the advice in the new planning guidance, that planning authorities should respond to the specific requirements of the distribution sector.
- 4.10 Our second task was to consider a list of sites provided by the Council and assess if they had potential for intensification. We have looked at those sites on

the list in detail and have concluded that they are unlikely to deliver significant additional floorspace, sometimes because they are not physically suitable, but mostly because there are no reasonable prospects that owners or promoters would have any incentive to intensify them. In relation to intensification strategy generally, we have also advised that outside the GWC industrial redevelopment should be encouraged to provide like-for-like replacement of standard industrial units, as opposed to multi-storey 'business units' – which are unlikely to be viable or in demand, partly because they would compete for occupiers with more attractive opportunities created by the masterplanned regeneration of the GWC.

- 4.11 Thirdly and finally, we have commented on three proposed strategic allocations in the Green Belt – the office park at Heathrow Gateway and industrial schemes at Airport Business Park and Land at Dick Turpin Way. In our opinion all three sites are very suitable for their proposed uses and will be attractive to the market. For Heathrow Gateway, we have suggested changes in layout to make the new offices more accessible to the station. For Airport Business Park and Dick Turpin Way, we have suggested that policy should require new warehouses to be multi-storey, subject to market testing. If the GLA is to be successful in delivering multi-decked warehousing, it will be in a location such as this. Therefore we think it sensible that the policy at least require that this format be fully tested before permitting alternative formats.

**APPENDIX A
HOUNSLOW EMPLOYMENT LAND REVIEW 2016
EXECUTIVE SUMMARY**

Executive summary

1. This study assesses the future demand and need for different types of employment land in the borough in the plan period 2015-30, and considers how much more land is needed, and where this should best be located to accommodate the demand.
2. The study provides the evidence base to support and underpin the employment policies, designations and site allocations in the two Local Plan review areas – the Great West Corridor and West of the Borough.

The policy context

3. Our review of planning policy at national and regional level indicates that the borough's plans and policies should actively and positively support economic growth, including by doing all it can to meet the demand for employment land. To plan for change in employment land and floorspace (new sites and potentially planned release) the Council should work co-operatively with neighbouring authorities, especially its partners in the functional economic market area (FEMA) and other stakeholders including business interests.
4. The policies and designations in the adopted Local Plan are aligned with these strategic directions. But in light of the Inspector's report the plan leaves open one broad question: how much new land is likely to be required for office and industrial development and where it should be located? This is with particular reference to the plan review areas, and is the main objective of this study. The future development of Heathrow Airport will have a major bearing on how much land is needed to meet employment demand.
5. In line with the study brief, another study objective is to strengthen policy and decision-making in relation to the protection of existing employment sites – making it as clear as possible what should be protected and why.

The functional economic market area

6. Travel to Work Area maps and commuting flows data are used to define the FEMA that is most relevant to Hounslow. The data indicates Hounslow has strong links to most of its west London neighbours and Spelthorne and Slough outside London. The property market evidence draws out the diverging office and industrial markets that have their key drivers beyond the borough – Heathrow/M4/M3 corridor for industrial, and largely proximity to Inner and Central London for offices, but not entirely. Thus, we recommend the best fit FEMA for Hounslow as Hillingdon, Ealing, Richmond, Spelthorne and Slough. But the links with Hammersmith & Fulham, and Brent suggest these boroughs will also be relevant for duty to cooperate discussions.
7. Under the duty to co-operate the Council should share the study findings with the other authorities within and just beyond the FEMA, and work with them to resolve any imbalances between the supply and demand of employment land across the FEMA.

Property market profile

8. The study explores the office and industrial property markets. The office market is found to be defined by two submarkets - a market for larger, modern offices from large corporate companies, and a market for smaller, modern spaces from local occupiers. There is a shortage of larger, modern grade A office space, and high rents and strong demand for this type of space makes development viable – particularly campus-style development. The strength of the market for this type of space presents a significant opportunity, and to allow developers to bring this type of property to the market, large sites in strong locations must be identified, particularly sites close to Chiswick and Bedfont Lakes. The property market for the small to mid-sized local office market is weaker. The focus of demand is in the TV Triangle area and around Chiswick. But, developers are not providing premises to meet the demand in these locations principally because potential occupiers are not able to afford the rents, and therefore development is proving unviable.
9. There is availability of cheaper affordable offices in the borough's town-centres (with the exception of Chiswick), but demand for town centre office space is very weak (again except in Chiswick). Town-centre offices therefore represent a surplus of floorspace. Market sentiment is not expected to improve anytime soon, and the market correction mechanism of change of use to residential will continue until the supply of this type of space balances with the demand threshold.
10. The industrial market is also defined by two submarkets. There is demand for high-quality modern logistics units from cargo, freight and distribution occupiers, and also for smaller industrial units from smaller local businesses.
11. Logistics floorspace is in short supply, and is taken up quickly. The high levels of demand, and high rents make development viable, but developers report that there is a lack of available land. Land availability in the Bedfont, Feltham, Cranford and Heston areas (west of the Borough) is particularly needed to meet the demand for logistics space.
12. There is also healthy demand for local industrial space, but development is not coming forward principally because developers are less certain of the market for this type of property. In order to provide for increasing demand for industrial uses more land is needed. If land is not allocated for industrial (and indeed for office use), the borough will not be able to accommodate the growth in demand, and could lose out on jobs as businesses locate (or relocate) elsewhere in the economic market area, albeit these areas have their own issues in respect of Green Belt and competition for land.

Employment floorspace demand & supply

13. The study assesses past gains and losses in employment floorspace, and then makes a quantitative assessment of the demand for new employment floorspace over the plan period to 2030 based on a view of future growth in the local economy using employment forecast data supplied by Experian Economics. The

data is converted from employment sectors to land use categories (office B1a, and industrial B1b,c B2 & B8) through PBA’s sector to land use mapping tool, and then jobs in land use sectors are converted to floorspace by applying recognised standard employment space densities plus an allowance for vacancy ‘churn’. The resultant floorspace need figures are then adjusted to allow for the known gains and losses of office floorspace in the planning pipeline.

14. For offices the past and present floorspace figures are set out in the table below, and show a rapid increase since 2000, and even while there was a small decline between 2005/10, provision accelerated again to 2015. The second and third rows in the table identify the forecast ‘floorspace need to 2030’ figure - 151,000 sq m.

Office floorspace, past, present and future, sq m (GIA)

	2000	2005	2010	2015	2030
Floorspace	598,000	764,000	736,000	827,000	
Floorspace forecast					978,000
Floorspace need to 2030					151,000
Potential supply to 2030					149,000
Supply (over supply) or shortfall					2,000

Source: VOA and PBA

15. The 151,000 sq m figure takes into consideration all known current supply, and is therefore the office floorspace gap figure. The study identifies how the gap can be closed through the ‘potential supply to 2030’ figure of 149,000 sq m. The additional supply contained in the ‘potential supply to 2030’ figure comprises:
- redevelopment at sites in three employment clusters –Riverbank Way and part of the Power Road and Great West Road SIL sites (two of these sites would result in loss of industrial land); and
 - a new greenfield allocation at the Clockhouse roundabout.
16. These sites are collectively capable of delivering approximately 149,000 sq m of office floorspace to close the demand supply office floorspace gap. However, any use of Green Belt would need to satisfy the exceptional circumstances test¹³. It is for the Council to decide if this represents the best use of the land, and the best means of meeting demand for office floorspace.
17. Two of the sites suggested for office development are currently in industrial use, and redevelopment will involve the loss of 52,000 sq m of industrial space. But there are sufficient opportunities from intensification of other industrial sites and for new industrial site allocations to allow for the switch of these sites from industrial to office use, thereby filling the gap in office floorspace supply.

¹³ National Planning Policy Framework, 2012, paras 83-85

18. For industrial activity the table below sets out the past and present floorspace figures, and shows that the long-term decline in industrial floorspace slowed significantly between 2010 and 2015, and is forecast to grow substantially in the future. The growth in floorspace demand is forecast to be 170,000 sq m at 2030 after accounting for all the known gains and losses in the planning pipeline.
19. The third row in the table identifies the total 'floorspace need to 2030' to be 222,000 sq m after all gains and losses have been accounted for. This figure builds in the 52,000 sq m of existing industrial floorspace that will be replaced by a larger quantum of new office floorspace, located in the areas of office demand.

Industrial floorspace, past, present and future, sq m (GIA)

	2000	2005	2010	2015	2030
Floorspace	1,295,000	1,321,000	1,208,000	1,204,000	
Floorspace forecast					1,374,000
Floorspace need to 2030					222,000
Potential supply to 2030					219,000
Supply (over supply) or shortfall					3,000

Source: VOA and PBA

20. The industrial floorspace demand supply balance gap – 222,000 sq m (equivalent to a site area of 55 ha) is only partially filled by intensification at existing sites; a potential figure of 54,000 sq m has been identified, leaving the gap as 170,000 sq m. Additional sites for industrial use are needed to close the gap, and we recommend the allocation of land at the following sites:
- extension to Radius Park; and
 - land to the north west of Clockhouse roundabout.
21. These sites are capable of accommodating at least 165,000 sq m to close the gap, but are currently designated Green Belt, and would need to satisfy the exceptional circumstances test¹⁴. But they would meet the demand where it is most needed, in the West of the Borough.

Heathrow third runway scenario

22. The study models the potential impact of a third runway at Heathrow on employment in Hounslow. This scenario is based on the forecasts in the 2013 Heathrow Employment Impact Study¹⁵, and suggests that the impact of a third runway at Heathrow would more than double the jobs growth forecast across the whole of the borough over the next 15 years under the 'business as usual'

¹⁴ ibid

¹⁵ Heathrow Employment Impact Study, commissioned by Hounslow, Ealing and Slough Councils, and prepared by Parsons Brinckerhoff and Berkeley Hanover Consulting, December 2013

scenario discussed above. This illustrates the huge effect that a third runway at Heathrow would have on the Hounslow economy.

Policy conclusions

23. The current policy to safeguard existing office space, subject to a market test, remains justified – as does the Article 4 Direction that will shortly come into force. The Direction will give control back to the Council, and we recommend careful monitoring of future losses so that planning control decisions are informed by the balance between demand and availability of supply.
24. We consider that all of the existing employment sites in the borough (designated and non-designated) are fit for purpose, with the possible exception of some secondary offices in and around town centres. We do not therefore recommend that any land is released for non-employment uses. Our work has identified eleven non-designated industrial use clusters that we recommend should be considered for LSIS designation, which would provide a suitable level of protection of employment floorspace and jobs.
25. Hounslow's business parks and the Great West Road provide highly suitable accommodation for high-value corporate occupiers in the emerging media and broadcast sectors. Additional development and redevelopment at the sites we have identified to accommodate growth will generate a large volume of additional supply in the right locations for this sector, and should be as attractive as the current stock.
26. But smaller, less profitable businesses in the emerging sectors have difficulty finding affordable space in Hounslow, and may be priced out so they generally locate in cheaper parts of London. The Council may consider an appropriate response is to provide or subsidise accommodation for SMEs in the sector. It will be important to ensure the provision of accommodation in order to support the digital and media sector, which has achieved rapid growth in the past and has further great growth potential.
27. Work recently undertaken by the GLA to provide evidence for the next London Plan shows Hounslow has lost 15.5 Ha of industrial land over the past five years, set against the Mayor's benchmark release figure of 15 Ha over the 20 years to 2031. The rate of loss that has been experienced is alarming, albeit according to the borough AMRs, the losses have all been outside of the designated industrial areas. Clearly the rate of loss has far exceeded that anticipated, and this study shows that the Mayor's policy should shift from one of supporting appropriate managed release to one of retention of industrial land. A strategic review is needed through the next London Plan to assess if boroughs like Hounslow should no longer be identified for industrial land release. As referred to above, locally there is a need for more industrial clusters to be protected through LSIS designation.
28. The site appraisals and market assessments indicate that the stock of industrial floorspace available and suitable for redevelopment for alternative uses has reduced substantially in recent years. This has led to higher values of the

remaining industrial land and in almost all cases it is now viable to redevelop existing industrial sites for industrial uses. The remaining stock of land should be retained for industrial use, and where possible industrial uses intensified. The caveat to this is that we do suggest redeveloping some industrial sites for office use, because the need for offices in the right locations is pressing, and the industrial land lost can be replaced elsewhere.

29. All of the sites we recommend for additional office development are in one or the other of the Local Plan review areas. Of the sites we recommend for additional industrial development or intensification all but one are in the West of the Borough. Thus, this study concludes that there is significant scope for employment development within both Local Plan areas. In the Great West Road this relates mainly to offices. In the West of the borough the focus is on industrial development, with some important exceptions, for example at Bedfont Lakes.
30. The proposals in this report, for intensification of some sites and the new site allocations, would fill these gaps. However, it is ultimately up to the Council to determine the best use of land balancing other factors such as policy constraints and demand for other land uses

APPENDIX B

SECTOR-TO-SPACE MAPPING MAPPING ECONOMIC SECTOR TO LAND USE

- 1 Economic statistics and forecasts tell us nothing directly about employment space, because they do not classify jobs according to the type of space they occupy. Rather, the statistics split jobs into economic sectors (industries and services), according to the Standard Industrial Classification (SIC). To estimate how many jobs will be based in offices and industrial space, and how many in 'non-B' spaces such as retail premises, schools and hospitals, we need to translate sectors into land uses.
- 2 For this, we have used a method developed by the PBA team (formerly Roger Tym & Partners) over a series of employment land reviews, and tested in a large-scale study of the Yorkshire and Humber region in 2010¹⁶. To our knowledge there is no other published empirical research on the relationship between activity sectors and land uses.
- 3 The tables below show the sectors that are classified to industrial (subdivided into manufacturing and warehousing) and offices respectively. The names and numbers that identify each activity sector are from the UK Standard Classification of Economic Activities 2007 (SIC 2007)¹⁷. These tables aggregate the data from the finest grain 5 digit SIC level which is the base for the mapping. The reason we use the 5-digit level is that within each sector there may be activities that are industrial based and others that are office or manufacturing. Further on in this note we cite construction activity as an example of a sector containing different land use activities.

¹⁶ Roger Tym & Partners with King Sturge for Yorkshire Forward, Planning for Employment Land: Translating Jobs into Land, March 2010

¹⁷ <http://www.businessballs.com/freespecialresources/SIC-2007-explanation.pdf>

Table A1 Industrial sectors

Manufacturing		
Manufacturing and repairs	10-33	All manufacturing
	95.00	Repair of computers and personal and household goods
Other industrial		
Construction	43.2	Electrical, plumbing and other construction installation activities
	43.3	Building completion and finishing
	43.9	Other specialised construction activities not elsewhere specified
Motor vehicle activities	45.2	Maintenance and repair of motor vehicles
	45.4	Sale, maintenance and repair of motor cycles and related parts and accessories
Sewage and refuse disposal	37	Sewage
	38	Waste collection, treatment and disposal activities
Employment activities (part)	78	
Warehousing		
Wholesale trade except of motor vehicles and motorcycles	46	
Freight transport by road	49.41	
Removal services	49.42	
Storage and warehousing	52.10	
Other supporting land transport activities	52.21	
Cargo handling	52.24	
Post and courier activities	53.00	
Packaging activities	82.92	
Employment activities (part)	78	

Note

SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment.

Table A2 Office sectors

Office sectors		
Publishing	58	Motion picture production activities
Motion picture, video and TV programme activities	59.11	Motion picture, video and TV programme production activities
	59.12	Motion picture, video and TV programme post-production activities
	59.13	Motion picture, video and TV programme distribution activities
	59.20	Sound recording and music publishing activities
Programming and broadcasting activities	60	
Computer programming, consultancy and related activities	62	
Information service activities	63	
Financial service activities except insurance and pension funding	64	
Insurance, reinsurance and pension funding except compulsory social security	65	
Activities auxiliary to financial services and insurance activities	66	
Real estate activities	68	
Legal and accounting activities	69	
Activities of head offices, management consultancy activities	70.	
Architectural and engineering activities, technical testing and analysis	71	
Scientific research and development	72	
Advertising and market research	73	
Other professional, scientific and technical activities	74	
Renting and leasing activities	77.40	Leasing of intellectual property and similar products
Employment activities (part)	78	
Security and investigation activities	80	
Office admin, office support and other business support activities	82	
Public administration and defence; compulsory social security	84.1	Administration of the State and the economic and social policy of the community
	84.3	Compulsory social security activities

Note

SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment

- 4 On a technical note, most economic forecasts show around 20-30 broad activity sectors, a much coarser-grained classification than the SIC sectors in the table above, and the 5 digit SIC level we use that is set out in the Annex below. For example, the table counts as a B-space activity only part of the Construction industry (SIC 43.2, 43.3 and 43.9), whereas forecasts typically show only Construction as a whole (SIC 43). To estimate future employment in sub-sectors such as SIC 43.2, we assume that the share of each sub-sector's employment in its 'parent' sector stays constant.
- 5 There are two further technical difficulties with the relationship of sectors to land uses. The first is that the line between production space (factories and workshops) and warehousing is blurred. This is not surprising, because manufacturing and warehousing largely occupy the same kinds of buildings, many units combine both functions in proportions that vary over time, and smaller buildings are allowed to shift between the two without planning permission.
- 6 In setting total land provision targets, therefore, factories, workshops and warehouses, should be merged into a single 'industrial' category. This should not cause any problems, because these uses operate in similar buildings and at similar employment densities, except for very large units including strategic warehousing. In areas where they form a significant part of the stock, these large units should be allowed for separately.
- 7 The other problem with the tables is that some of the jobs which the table allocates to industrial space are in fact in offices. These jobs are probably in administration, sales and marketing functions of industrial and related businesses. A construction or plumbing business, for example, will often have an office that deals with orders, appointments, record-keeping and the like. In some cases this will be ancillary to an industrial unit and therefore not count as office space, but in other cases it will be free-standing. If the business is small, the office may be its only premises.
- 8 In total, the Yorkshire and Humber survey found that around one tenth of the jobs which our method allocates to industrial space (factories, workshops and warehouses) are in fact in offices. For a large area such as the region, this is too small a proportion to distort land provision targets. But in some local authority areas, especially the more highly urbanised, it is likely that the distortion is significant. Employment land reviews should aim to correct these distortions, using local knowledge to adjust the relationships shown in the tables above.
- 9 There are many other, place-specific factors why the sector-to-land-use relationships in the tables above may be invalid. For example, in some places large business units are assigned to the wrong sector or the wrong side of the local authority boundary. In other places, particular sectors are untypical and do not occupy the kinds of space that one would normally expect. In one local authority area in England, for example, there are many jobs classified to Other Supporting Land Transport Activities, SIC 52.21, which normally would occupy warehousing in the local authority area. But in this case most of the SIC 52.21 jobs relate to railway maintenance and the people concerned work all over the country, mostly outdoors.
- 10 Where such anomalies arise, close inspection of the numbers, combined with local knowledge, should help correct the statistics and customise the sector-to-land-use assumptions.
- 11 However, it is inevitable that sector-to-land-use relationships are less reliable for small than larger areas. As the Yorkshire and Humber survey illustrated, the relationships shown in our tables work very well for whole regions. But they are not reliable for individual buildings or employment areas, and may not be reliable at local authority level. This is one of the reasons why demand forecasts are more robust for regions than individual local authority areas.
- 12 The Yorkshire and Humber report provides further information and advice on sector- to-land-use relationships.

**APPENDIX C
COMMITTED LOSSES OF EXISTING
EMPLOYMENT SPACE**

INDUSTRIAL - COMMITTED LOSSES						
Council reference	Use Class	Scheme Name	Site name/number	Street name	Ward	Gross loss (sq m)
00257/E/P5	B1C		Modebest Plant Ltd & Old Rectory Nursery	Church Road	HESTON WEST	650
01380/C/P7	B2		Land West Of	Dick Turpin Way	FELTHAM NORTH	2,578
00703/A/P14	B2	Brentford Community Stadium	Land At Lionel Road	Lionel Road	BRENTFORD	30,044
00297/R/P3	B2	Brentford Lock West	Land And Buildings At Commerce Road Industrial Estate	Commerce Road	SYON	8,900
01498/A8/P1	B2		Unit 8	Syon Gate Way	OSTERLEY AND SPRING GROVE	610
01276/B/P1	B8		Steyning Way,	Steyning Way,	CRANFORD	1,278
00703/A/P11RESI	B8	Brentford Community Stadium	Land At	Lionel Road	BRENTFORD	1,832
01431/B/P5	B8		20	Dolman Road	TURNHAM GREEN	45
00975/8-10/P2	B8		8-10	St Dunstan's Road	FELTHAM WEST	382
00859/22/P9	B8		22-24	Park Road	HANWORTH PARK	444
00439/21/P1	B8		21	Fern Grove	FELTHAM NORTH	1,393
00644/41A/P2	B8		41a	Ivy Road	HOUNSLOW CENTRAL	173
00504/AE/P22	B8	Segro Park Heathrow	Segro Park Heathrow	Ariel Way	CRANFORD	2,784
00981/A/P2	B8		1a - 5	St Johns Road	OSTERLEY AND SPRING GROVE	271
01293/1/PA1	B8		1	Lion Way	SYON	272
00297/H/P13	B8		1	Commerce Road	SYON	1,778
00297/G8/PA4	B8		Brentford Business Centre	Commerce Road	SYON	120
TOTAL						53,554
Source: London Borough of Hounslow						

OFFICE - COMMITTED LOSSES

Council reference	Use Class	Scheme Name	Site name/number	Street name	Ward	Gross loss (sq m)
00608/1A/P5	B1a		1a	High Street	CRANFORD	235
01628/1/PA2	B1a		1	Dukes Green Avenue	FELTHAM NORTH	5,530
00083/750-754/PA2	B1a	First Floor	750-754	Bath Road	CRANFORD	196
00609/BX/PA2	B1a	1st And 2nd Floors	Axiom House, The Centre	High Street	FELTHAM WEST	460
00609/BX/PA3	B1a	3rd, 4th & 5th Floors	Axiom House, The Centre	High Street	FELTHAM WEST	690
00403/E/PA4	B1a		Smith House	Elmwood Avenue	HANWORTH PARK	7,907
01359/D/PA2	B1a		U P S House	Forest Road	HANWORTH PARK	2,616
01276/B/P2	B1a		Steyning Way,	Steyning Way,	CRANFORD	1,667
01276/B/P1	B1a		Steyning Way,	Steyning Way,	CRANFORD	1,667
01275/678/P1	B1a		678	Pulborough Way	CRANFORD	243
00996/50/PA3	B1a	Floors 7-10	Vista Business Centre 50	Salisbury Road	CRANFORD	4,566
00507/99/PA1	B1a		99	Green Lane	CRANFORD	1,000
01054H/527/P4	B1a		Bishops Gate Hse, 527-529	Staines Road	HOUNSLOW WEST	2,582
01054H/DM/P2	B1a		358-360	Staines Road	HOUNSLOW HEATH	112
01054/155-159/PA3	B1a		155-159	Staines Road	HOUNSLOW WEST	1,576
00600/133/P4	B1a		133	Heston Road	HESTON EAST	75
01054H/83-93/PA1	B1a	Ground Floor	Aer Lingus House	Staines Road	HOUNSLOW WEST	300
01054/83-93/P13	B1a	Upper Floors	83-93	Staines Road	HOUNSLOW WEST	1,107
01054/65-73/PA1	B1a	3rd And 5th Floors	Holdsworth House 65-73	Staines Road	HOUNSLOW WEST	650
01054/65-73/PA2	B1a	3rd And 5th Floors	Holdsworth House 65-73	Staines Road	HOUNSLOW WEST	143
00083/50A/PA1	B1a		Somerville House 50a	Bath Road	HOUNSLOW WEST	1,500
00676/88/P2	B1a		LBH Civic Centre & 88 Lampton Rd	Lampton Road	HESTON EAST	3,500
00676/2-4/PA5	B1a		Whitelocke House 2-4	Lampton Road	HOUNSLOW WEST	2,000
00676/1/PA2	B1a		1	Lampton Road	HOUNSLOW CENTRAL	14,716
01254/264/PA1	B1a	Ground Floor	264	Hanworth Road	HOUNSLOW HEATH	75
00108/42/PA2	B1a		42	Bell Road	HOUNSLOW CENTRAL	64
00327/50-52/PA3	B1a	First Floor	Premier House, 50- 52	Cross Lances Road	HOUNSLOW HEATH	109
00616/F/P19	B1a		Key Site 1	High Street	HOUNSLOW CENTRAL	263
00610/54-66/PA1	B1a	1st, 2nd & 3rd Floors	Euro House 54-66	High Street	HOUNSLOW CENTRAL	2,135
00981/B7/PA2	B1a		Coomb House, 7	St Johns Road	OSTERLEY AND SPRING (1,455
00702/15A/PA1	B1a		15a	Linkfield Road	SYON	50
00981/C(U5)/PA2	B1a		Unit 5 67-69	St John's Road	ISLEWORTH	300
00981/C(U4)/PA1	B1a		Unit 4 (Known As 63) 67-69	St Johns Road	ISLEWORTH	140
02912/A3/PA1	B1a	New Horizons Court	Building 3	Ryan Drive	OSTERLEY AND SPRING (3,344
02912/A4/PA2	B1a	New Horizons Court	Building 4	Ryan Drive	OSTERLEY AND SPRING (3,344
02912/A2/PA1	B1a	New Horizons Court	Building 2	Ryan Drive	OSTERLEY AND SPRING (3,346
02912/A1/PA2	B1a	New Horizons Court	Building 1	Ryan Drive	OSTERLEY AND SPRING (3,344
00133/313/PA1	B1a		313	Boston Manor Rd	BRENTFORD	316
01101/F/P4	B1a		White Lion Court	Swan Street	ISLEWORTH	269
01101/F/P1	B1a		Swan Crt And White Lion Crt 5	Swan Street	ISLEWORTH	6,732
01101/C/PA1	B1a		Saracen House	Swan Street	ISLEWORTH	701
01101/G/PA1	B1a		Ashby House	Swan Street	ISLEWORTH	318
00297/G8/PA3	B1a	1st Floor	Brentford Business Centre Unit 8	Commerce Road	SYON	96
00297/G9/P1	B1a		9 Brentford Business Centre	Commerce Road	SYON	55
00297/G13/PA2	B1a	Brentford Business Centre	13	Commerce Road	SYON	55
01600/A/PA9	B1a	Great West Plaza	Units 1, 2, 3, 4, 5 & 6	Riverbank Way	SYON	4,220
01600/A/PA10	B1a	Great West Plaza	Units 1, 2, 3, 5 & 6	Riverbank Way	SYON	9,580
01600/A4/PA3	B1a	Great West Plaza	Unit 4, Great West Plaza	Riverbank Way	SYON	2,674
00607/155/PA2	B1a		155	High Street	SYON	257
01201/2A/P2	B1a		2a	Whitstile Road	BRENTFORD	32
00505/Z/P36	B1a		Former Alfa Laval Site	Great West Road	BRENTFORD	7,469
01243/B/PA2	B1a	Ground Floor	Star House	York Parade	BRENTFORD	58
01243/A/PA3	B1a	Ground & Mezzanine Floors	York House	York Parade	BRENTFORD	168
01128/F/PA3	B1a		Unit O, The Old Pumping Station	Pump Alley	SYON	58
00886/11/P19	B1a		11	The Pavement	BRENTFORD	1,411
00607/M/PA2	B1a		Max Factor House 40a	Hight Street	BRENTFORD	2,160
00657/B/P28	B1a		Former Thames Water Land	Kew Bridge Road	BRENTFORD	308
00505/D/PA10	B1a		Parkview	Great West Road	BRENTFORD	3,673
01073/5A/PAC1	B1a		5a	Stile Hall Parade	CHISWICK RIVERSIDE	96
00248/U/P7	B1a		Wheatstone House 650	Chiswick High Road	BRENTFORD	6,336
01161/58A/PA3	B1a		58a	Waldeck Road	CHISWICK RIVERSIDE	230
00890/114/P1	B1a		Studio 1 & 5 Power Road 114	Power Road	TURNHAM GREEN	220
00847/24/PA1	B1a	Upper Ground Floor	24 Oxford House	Oxford Road	TURNHAM GREEN	70
00248/367/PA2	B1a		367	Chiswick High Road	TURNHAM GREEN	176
00248/492-496/PA1	B1a		492-496	Chiswick High Road	TURNHAM GREEN	55
01091/2/PA2	B1a		2	Sutton Court Road	TURNHAM GREEN	82
01431/4/PA1	B1a		4	Dolman Road	TURNHAM GREEN	70
00590/3-8/PA2	B1a		3-8 Devonhurst Pce Heathfield Tce		TURNHAM GREEN	2,759
00248/277-279(F)/PA	B1a	First Floor	277-279	Chiswick High Road	TURNHAM GREEN	165
00590/J/PA2	B1a		3 Prospect Place	Heathfield Terrace	TURNHAM GREEN	96
00248/326-334/PA1	B1a	Second Floor	326-334	Chiswick High Road	TURNHAM GREEN	343
01218/10/P12	B1a		10	Windmill Road	TURNHAM GREEN	985
01247/1B/PA1	B1a		1b	Devonshire Mews	TURNHAM GREEN	50
01247/17/PA2	B1a		17	Devonshire Mews	TURNHAM GREEN	70
01247/9/PA1	B1a		9	Devonshire Mews	TURNHAM GREEN	89
00395/1B/PA1	B1a		1b	Elliot Road	TURNHAM GREEN	101
02901/C2/P1	B1a		2 Oak Lock Mews	Fraser Street	TURNHAM GREEN	40
00354/99/PA1	B1a	Ground Floor	99	Devonshire Road	TURNHAM GREEN	50
00354/103/PA2	B1a		103	Devonshire Road	TURNHAM GREEN	142
00248/147/PA1	B1a		First Floor 147 + 12 Annadale Rd.	Chiswick High Road	CHISWICK HOMEFIELDS	590

02920/A(U1)/P1	B1a	Unit 1	Concord Court	Palladian Gardens	CHISWICK HOMEFIELDS	929
00261/E/PA4	B1a	Ground Floor	Lamb House	Church Street	CHISWICK HOMEFIELDS	131
00248/7-9/P1	B1a		7-9	Chiswick High Road	CHISWICK HOMEFIELDS	110
01055/14-16/PA1	B1a		14 - 16	Stamford Brook Ave	CHISWICK HOMEFIELDS	1,267
00248/171/P6	B1b	First Floor	171	Chiswick High Road	TURNHAM GREEN	70
TOTAL						128,939

APPENDIX D INDUSTRIAL LAND SUPPLY

INDUSTRIAL SUPPLY (PERMISSIONS)							
Borough Reference	Use Class	Scheme Name	Site Name/Number	Street Name	Ward	Net change (sq m)	
01054/A2/P6	B8		Central Park Estate Unit 2	Staines Road	HOUNSLOW WEST	746	
01499/C24/P4	B8		Unit 20a Airlinks Industrial Estate	Spitfire Way	HESTON WEST	281	
01239/H11A-11B/P4	B8		Unit11a & 11b Worton Hall Industrial Estate	Worton Road	HOUNSLOW SOUTH	275	
00550/AQ/P7	B8		Former Sita Site, Hanworth Trading Estate	Hampton Road	HANWORTH	3,789	
01660/B/P6	B8		Cargo Service Centre Ltd	Bedfont Road	BEDFONT	6,326	
01275/678/P1	B8		678	Pulborough Way	CRANFORD	244	
01498/A8/P1	B8		Unit 8	Syon Gate Way	OSTERLEY AND SPRING GROVE	305	
00580/7-9/P1	B8		Units 7-9 Trade City	Christopher Road Southall	HESTON WEST	963	
01276/B/P1	B2		Steyning Way,	Steyning Way,	CRANFORD	2,056	
01499/C24/P4	B2		Unit 20a Airlinks Industrial Estate	Spitfire Way	HESTON WEST	281	
01054/K/P42	B2		St Alban's Farm	Staines Road	CRANFORD	13,173	
01660/B/P6	B2		Cargo Service Centre Ltd	Bedfont Road	BEDFONT	6,326	
01054/A2/P6	B2		Central Park Estate Unit 2	Staines Road	HOUNSLOW WEST	746	
00504/AE/P22	B2	Segro Park Heathrow	Segro Park Heathrow	Ariel Way	CRANFORD	9,926	
01477/B/P1	B2		130	Bollo Lane	TURNHAM GREEN	7,266	
01660/B/P6	B1C		Cargo Service Centre Ltd	Bedfont Road	BEDFONT	6,326	
00504/AE/P22	B1C	Segro Park Heathrow	Segro Park Heathrow	Ariel Way	CRANFORD	9,926	
01276/B/P2	B1C		Steyning Way,	Steyning Way,	CRANFORD	389	
01276/B/P1	B1C		Steyning Way,	Steyning Way,	CRANFORD	389	
01499/C24/P4	B1C		Unit 20a Airlinks Industrial Estate	Spitfire Way	HESTON WEST	281	
TOTAL						70,014	
INDUSTRIAL SUPPLY (AIRPORT BUSINESS PARK, HATTON CROSS)							
Reg 19 ref	Area	Use Class	Scheme Name	Site Name/Number	Street Name	Ward	Net change (sq m)
57	WOB	B1c/ B2/ B8	Airport Business Park	Land between Hatton Road, The Duke of Northumberland's River and Eggs Road	Hatton Road	Feltham North W	145,000
TOTAL						145,000	

INDUSTRIAL - SUPPLY (OTHER EMERGING SITE ALLOCATIONS)							
Reg 19 ref	Area	Use Class	Scheme Name	Site Name/Number	Street Name	Ward	Net change (sq m)
3	GWC	B1c/ B2/ B8	Gillette Factory	Gillette Corner	Great West Road, Isleworth	Osterley and Spring Grove	15,913
4	GWC	B1c/ B2/ B8	Classic Cars, 125 Harlequin Avenue	125 Harlequin Avenue	London	Osterley and Spring Grove	5,420
5	GWC	B1c/ B2/ B8	West Cross Campus	West Cross Industrial Estate	West Cross Industrial Estate	Osterley and Spring Grove	24,099
6	GWC	B1c/ B2/ B8	BSS Brentford	BSS Brentford	Transport Avenue	Osterley and Spring Grove	2,590
7	GWC	B1c/ B2/ B8	Profile West Brentford Car Park	R/O Profile West	950 Great West Road	Osterley and Spring Grove	1,210
8	GWC	B1c/ B2/ B8	Carpet Right	971 Great West Trading Estate	Great West Road	Osterley and Spring Grove	5,886
9	GWC	B1c/ B2/ B8	Syon Lane Industrial Estate	The Gate Centre / Syon Clinic	Brentford	Osterley and Spring Grove	1,713
10	GWC	B1c/ B2/ B8	931 Great West Road	Lookers Skoda	931 Great West Road	Osterley and Spring Grove	3,293
12	GWC	B1c/ B2/ B8	Former Syon Gate Service Station	Land South of Gillette Corner	Brentford	Osterley and Spring Grove	8,950
13	GWC	B1c/ B2/ B8	Harlequin Avenue Sub station	North of 125 Harlequin Avenue	Brentford	Osterley and Spring Grove	-687
14	GWC	B1c/ B2/ B8	Phillips & Wood	2 Harlequin Avenue	London	Osterley and Spring Grove	1,440
21	GWC	B1c/ B2/ B8	Enterprise, Boston Park Road	Enterprise Rent a Car	Boston Park Road	Brentford	3,340
22	GWC	B1c/ B2/ B8	1020 Great West Road	1020 Great West Road	London	Brentford	2,885
23	GWC	B1c/ B2/ B8	Texaco Filling Station, Great West Road, Brentford	Dome Filling Station, Great West Road	London	Brentford	3,880
24	GWC	B1c/ B2/ B8	Layton Road Warehouses	2 Layton Road	London	Brentford	-1,048
26	GWC	B1c/ B2/ B8	Phoenix Business Park	Phoenix Trading Park	Ealing Road	Brentford	10,944
28	GWC	B1c/ B2/ B8	27 Great West Road	27 & 1053 Great West Rd	Brentford	Brentford	-1,343
36	GWC	B1c/ B2/ B8	110 Power Road	111 Power Road	Power Road	Turnham Green	7,722
43	WOB	B1c/ B2/ B8	Heathrow International Trading Estate	Heathrow International Trading Estate	Green Lane	Cranford	424
44	WOB	B1c/ B2/ B8	Central Park Trading Estate	Central Park	Staines Road	Cranford	5,850
45	WOB	B1c/ B2/ B8	Land at Green Lane	Land at Green Lane	Hounslow	Cranford	10,270
46	WOB	B1c/ B2/ B8	Ron Smith Recycling	St Albans Farm	Staines Road	Cranford	-15,148
47	WOB	B1c/ B2/ B8	Car park	150-152 Great South West Road, Cranford	Great South West Road	Cranford	1,150
48	WOB	B1c/ B2/ B8	Vacant Land at Dick Turpin Way	Land r/o	Ciba House, Dick Turpin Way	Feltham North	11,900
49	WOB	B1c/ B2/ B8	Site at Faggs Road	145	London	Feltham North	5,950
51	WOB	B1c/ B2/ B8	Network House Feltham	Network House	Hounslow Road	Feltham North	-690
61	WOB	B1c/ B2/ B8	Council Depot, Ashmead Road	Council Depot, Ashmead Road	Feltham	Feltham North	-1,625
66	WOB	B1c/ B2/ B8	Browells Lane	Land at Browells Lane	Feltham	Hanworth Park	1,970
67	WOB	B1c/ B2/ B8	UPS House	UPS House		Hanworth Park	1,176
76	WOB	B1c/ B2/ B8	Lampton House	Lampton House	Lampton Road	Heston East	-958
77	WOB	B1c/ B2/ B8	Land South of Western International Market	Southhall Lane	Southhall	Heston West	15,800
85	WOB	B1c/ B2/ B8	Builders Yard	379-389 Staines Road	Hounslow	Hounslow West	-803
86	WOB	B1c/ B2/ B8	Former Travis Perkins	369-373 Staines Road	Hounslow	Hounslow West	-375
87	ROB	B1c/ B2/ B8	Euro House	54 - 66 High Street	Hounslow	Hounslow Central	-2,056
88	ROB	B1c/ B2/ B8	Land at Bridge Road Depot	Pears Road	Hounslow	Hounslow Central	-1,247
90	ROB	B1c/ B2/ B8	Inwood Business Park	Whitton Road	Hounslow	Hounslow Central	2,259
97	ROB	B1c/ B2/ B8	30 Rugby Road	Rugby Road	Isleworth	Isleworth	-4,100
99	ROB	B1c/ B2/ B8	Feltham Coachworks	Meon Court	London Road, Isleworth	Osterley and Spring Grove	750
102	ROB	B1c/ B2/ B8	Victory Business Centre	Fleming Way		Syon	-1,086
TOTAL							125,620

Source: London Borough of Hounslow

APPENDIX E OFFICE LAND SUPPLY

OFFICE SUPPLY (PERMISSIONS)						
Borough Reference	Use Class	Scheme Name	Site Name/Number	Street Name	Ward	Net change (sq m)
01660/B/P6	B1a		Cargo Service Centre Ltd	Bedfont Road	BEDFONT	2,632
00257/E/P5	B1a		Modebest Plant Ltd & Old Rectory Nirsey	Church Road	HESTON WEST	521
00996/50/P35	B1a	Vista Business Centre	50	Salisbury Road	CRANFORD	720
01254/65-67/P10	B1a		65-67	Hanworth Road	HOUNSLOW CENTRAL	45
00610/146-150/P16	B1a		Rear Of 146-150	High Street	HOUNSLOW CENTRAL	174
00667/15-19/P1	B1a		15-19	Kingsley Road	HOUNSLOW CENTRAL	41
00870/103A/S1	B1a		103a	Pears Road	HOUNSLOW CENTRAL	123
00558/4-8/P1	B1a		4 And 8	Harlequin Avenue	OSTERLEY AND SPRING GROVE	441
01498/A8/P1	B1a		Uint 8	Syon Gate Way	OSTERLEY AND SPRING GROVE	305
00133/H/S16	B1a		Boston Manor House	Boston Manor Road	BRENTFORD	300
00297/R/P3	B1a	Brentford Lock West	Commerce Rd Inld Estate	Commerce Road	SYON	6,680
00297/H/P13	B1a		1	Commerce Road	SYON	138
01217/92-94/P3	B1a		92-94	Windmill Road	BRENTFORD	414
00505/Z/P37	B1a	(Part Of) Site Allocation Holp12	Alfa Laval	Great West Road	BRENTFORD	6,653
00885/C/P3	B1a	Gunnersbury Park Museum	Gunnersbury Park	Popes Lane	BRENTFORD	115
00535/F/P5	B1a		Gunnersbury Cemetery 143	Gunnersbury Avenue (North Circular Road)	TURNHAM GREEN	74
00535/250/P13	B1a		250	Gunnersbury Avenue (North Circular Road)	TURNHAM GREEN	6,838
00418/8/P4	B1a		8	Essex Place	TURNHAM GREEN	80
01431/B/P5	B1a		20	Dolman Road	TURNHAM GREEN	31
00248/150/P6	B1a		150	Chiswick High Road	CHISWICK HOMEFIELDS	42
00176/A/P64	B1a		Img Axis Centre	Burlington Lane	CHISWICK HOMEFIELDS	990
00176/1/P2	B1a		1	Burlington Lane	CHISWICK HOMEFIELDS	10,065
TOTAL						37,422
Source: London Borough of Hounslow						

OFFICE SUPPLY (EMERGING SITE ALLOCATIONS)							
Reg 19 ref	Area	Use Class	Scheme Name	Site Name/Number	Street Name	Ward	Net change (sq m)
1	GWC	B1a/b	Sky Campus Brentford	Sky Campus	Centaurus Business Park, Syon Lane, Isleworth	Osterley and Spring Grove	19,457
3	GWC	B1a/b	Gillette Factory	Gillette Corner	Gillette Corner, Great West Road, Isleworth	Osterley and Spring Grove	-15,780
5	GWC	B1a/b	West Cross Campus	West Cross Industrial Estate	West Cross Industrial Estate	Osterley and Spring Grove	-10,525
15	GWC	B1a/b	Land at Glaxosmithkline	Car Park, Glaxo Smithkline	980 Great West Road	Brentford	12,190
16	GWC	B1a/b	Brentside Park	Brentside Park	Great West Road	Osterley and Spring Grove	1,786
17	GWC	B1a/b	Great West Plaza	Great West Plaza	Brentford	Syon	5,491
18	GWC	B1a/b	Great West House	Car Park	Great West Road	Syon	7,270
19	GWC	B1a/b	Mille Building	1,000	Great West Road	Brentford	8,299
20	GWC	B1a/b	Boston Manor Road Sub Station	Substation, Boston Manor Road	London	Brentford	7,950
28	GWC	B1a/b	27 Great West Road	27 & 1053 Great West Road	Brentford	Brentford	10,248
29	GWC	B1a/b	EMC Tower	Vantage West/Parkview/E MC	Great West Road	Brentford	4,302
31	GWC	B1a/b	1-4 Capital Interchange Way	Units 1-4, Capital Interchange Way	Capital Interchange Way Brentford	Brentford	5,940
33	GWC	B1a/b	Esso Filling Station Chiswick Roundabout	Chiswick Flyover Service Station	London	Brentford	5,622
34	GWC	B1a/b	Former Natwest Bank Site, Chiswick	NatWest Bank Site	Chiswick Curve, Chiswick	Tumham Green	5,310
35	GWC	B1a/b	B&Q Chiswick	B&Q	2 Larch Drive Chiswick	Tumham Green	1,470
37	GWC	B1a/b	Gunnersbury Station Car Park	Gunnersbury Station & Car Park	Chiswick	Tumham Green	1,230
64	WOB	B1a/b	MOD Feltham	Feltham Garrison	Elmwood Avenue	Hanworth Park	4,340
65	WOB	B1a/b	Leisure West	Leisure West	Air Park Way	Hanworth Park	480
66	WOB	B1a/b	Browells Lane	Land at Browells Lane	Feltham	Hanworth Park	4,160
67	WOB	B1a/b	UPS House	UPS House		Hanworth Park	-1,367
83	WOB	B1a/b	Vacant Land Clarence Terrace	Land r/o	Bell Road	Hounslow Heath	150
84	WOB	B1a/b	Hounslow Cavalry Barracks	Cavalry Barracks	Beavers Lane	Hounslow West	500
91	ROB	B1a/b	Hounslow Bus Garage	Land at Hounslow Bus Garage & Interchange	High Street, Hounslow	Hounslow Central	-691
92	ROB	B1a/b	Upstage	Upstage	Spring Grove Road	Hounslow Central	430
96	ROB	B1a/b	Europa House	Europa House	Church Street	Isleworth	464
103	ROB	B1a/b	West Middlesex Hospital	West Middlesex Hospital	Twickenham Road	Syon	2,600
105	ROB	B1a/b	Chiswick Telephone Exchange	Telephone Exchange	Barley Mow Passage	Tumham Green	4,000
106	ROB	B1a/b	Royal Mail, Chiswick Delivery Office	Chiswick Delivery Office	Heathfield Terrace	Tumham Green	3,440
108	ROB	B1a/b	Empire House	408-418	Chiswick High Road	Tumham Green	-1,275
TOTAL							87,491

Source: London Borough of Hounslow