London Borough of Hounslow

Hounslow Employment Land Review

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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 is: 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 test[1]. 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 filing the gap in office floorspace supply.

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

[1] National Planning Policy Framework, 2012, paras 83-85

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 test[2]. 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 Study[3], 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’ 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.

[2] ibid

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

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.

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APPENDICES

1 INTRODUCTION

1.1 This study was commissioned by Hounslow Council in November 2015, as part of the evidence base that helps inform planning policies and decisions in the borough. Its core purposes are to:

- Assess the future demand and need for different types of employment land in the borough in the plan period 2015-30;
- Compare it with the supply currently identified for employment uses,
- Advise accordingly on planning policy and development management, to show:
  - If and where additional land should be identified for employment, over and above the current planned supply
  - Conversely if some existing employment sites are no longer wanted and might be released for other uses.

1.2 The study brief sets seven more detailed tasks for the study, as summarised below.

i Define the functional economic market area (FEMA of which the borough of Hounslow forms part (we address this in Chapter 2 below);

ii Assess existing and planned employment sites in the borough, to see if they are suitable to meet future needs for employment land (addressed in Chapters 4 and 5);

iii Analyse the likely balance of land demand and supply over the plan period (chapter 5)

iv For the demand assessment above, use employment forecasts and test a range of employment forecasts (chapter 5);

v Provide guidance on any employment land that might be released to other uses, and conversely on any need for additional employment land to be identified (Chapter 5);

vi In particular, assess the needs of Hounslow's emerging sectors, such as media and broadcasting. Consider how far these needs can be met by allocating new sites in the preferred employment locations and the Local Plan Review areas at the Great West Corridor and West of the borough, which are identified for large-scale development and redevelopment in the Local Plan (Chapters 4 and 5);

vii Make policy recommendations on:

- The implications of change at Heathrow Airport
- How employment land provision can support emerging sectors
- How the Council can maintain an appropriate stock of offices, given that Permitted Development Rights (PDRs) allow offices to convert to residential use without planning permission

- The employment uses that could be accommodated in the Local Plan Review Areas
- Other matters raised in the Local Plan Inspector’s report (we discuss the report below at paragraph 2.52 onwards).

1.3 Below, in Chapter 2 we set the policy context and in Chapter 3 we define the functional economic market area. Chapter 4 analyses the current property market and Chapter 5 considers the demand and supply of employment land over the plan period. Finally Chapter 6 summarises our conclusions and makes recommendations.

2 POLICY CONTEXT

Introduction

2.1 To set the context for our study, in this chapter we summarise the national and London-wide policy and guidance that the Council's employment land policies and decisions should comply with. We also review the policies in the current Local Plan. In making recommendations the study needs to consider how these policies are best implemented and if any of them might be amended.

National policy and guidance

National Planning Policy Framework

2.2 For economic development, as for housing and other land uses, the guiding principle of national planning policy is the presumption in favour of sustainable development. As set out at paragraph 14 of the National Planning Policy Framework (hereafter "the Framework" or "NPPF"), this says that local plans should positively seek opportunities to meet the development needs of their areas, and those needs should be met in full unless the adverse impact of doing so would significantly and demonstrably outweigh the benefits, or specific policies in the Framework indicates that development should be restricted.

2.3 Other parts of the Framework reinforce this central principle and expand on its practical implications. In relation to economic development the main points include:

- Planning should do all it can positively to support sustainable economic growth. It should not act as an impediment to such growth. Significant weight should be placed on this objective throughout the planning system (paragraph 19).
- Local Plans should(paragraph 21):
  - Set out a clear economic vision and strategy for their area
  - Identify strategic sites, or set criteria to help identify other sites, for development in line with that strategy
  - Support existing business sectors and where possible plan for new or emerging sectors likely to locate in their area;
  - In particular, plan positively for clusters or networks of knowledge-driven, creative or high-technology industries
  - Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement
  - Avoid the long-term protection of sites allocated for employment uses where there is no reasonable prospect of their being used for that purpose
  - Facilitate flexible working practices such as mixing business uses with housing.

- Local authorities should work strategically across local boundaries, and in particular:
  - In building evidence bases, collaborate with neighbouring and county authorities and Local Enterprise Partnerships (paragraph 160)
  - In policy-making, co-ordinate strategic priorities across boundaries and accommodate the needs of neighbouring authorities that do not have enough sustainable capacity in their own areas (paragraphs 179-180).
- Local Plans should be supported by an evidence base that (paragraph 160):
  - Assesses needs for land and floorspace, both quantitative and qualitative, for all foreseeable types of economic activity over the plan period (the Framework particularly mentions the needs of the food production industry)
  - Reflects a clear understanding of business needs
  - Is based on close work with the business community to understand their needs and also identify and address barriers to investment, including lack of housing, infrastructure or viability (paragraph 160).

2.4 That part of the evidence base which relates to the employment (B-class) land uses is traditionally known as an employment land review, though the PPG does not use that term.

Planning Policy Guidance

2.5 The Planning Policy Guidance (PPG) expands on the question of cross-boundary working, advising that authorities join forces with neighbours, in line with the Duty to Co-operate, so that assessments of development needs cover market areas that straddle local authority boundaries. 'This is because such needs are rarely constrained precisely by administrative boundaries.'[4]

- For employment (B-class) uses, these are functional economic market areas.
- Where joint assessments are not practical due to different plan-making timetables, single-authority assessments may be acceptable; in that case authorities should refer to neighbours' evidence bases; and future timetables should be co-ordinated so that assessments are undertaken jointly.

2.6 In relation to the planning evidence base (which as mentioned earlier includes the employment land review), unlike for housing the PPG does not set out a method for assessing future needs. But the Guidance does provide a 'shopping list' of factors that the evidence should cover – which includes demand (business requirements, recent take-up), supply (the existing stock of employment land, recent development, employment land lost to other uses, physical / ownership constraints) and the balance between the two (rental values, land values,

[4] Paragraph: 007 Reference ID: 2a-007-20150320

evidence of oversupply and market failure). It adds that the evidence should estimate the future demand for land and floorspace, based on projections or forecasts; these forecasts should be both quantitative and qualitative and they should be broken down into sectors or market segments. It also lists other information that should be considered, including consultations. In the design of the present study we have aimed to meet all these requirements.

Permitted Development Rights

2.7 The government between 2013 and 15 introduced a number of temporary changes to permitted development rights (PDRs), allowing buildings to change use without planning permission, subject to a 'prior approval' process. The right most relevant to this study is the permitted change from B1a offices to C3 residential use. The government in October 2015 announced that the right would be made permanent.

2.8 In an attempt to protect office space many planning authorities have regained planning control through Article 4 Directions that exempt parts of their areas from PDRs. Hounslow Council has made an Article 4 Direction, covering all the borough's employment designations, which will come into effect in November.

2.9 We review the impact of PDRs in Hounslow later in this report.

The London Plan

2.10 The London Plan, amended in March 2015 provides the strategic context for this study and for policy development in Hounslow.

London's economy

2.11 Policy 4.1 of the plan, Developing London's Economy, sets out the plan's positive approach to the economy as a whole. It says that among other things the Mayor will work with partners to:

- *'… promote and enable the continued development of a strong, sustainable and increasingly diverse economy across all parts of London, ensuring the availability of sufficient and suitable workspaces in terms of type, size and cost, supporting infrastructure and suitable environments for larger employers and small and medium sized enterprises, including the voluntary and community sectors…*
- *Support and promote outer London as an attractive location for … businesses…*
- *Emphasis the need for greater recognition of the importance of enterprise and innovation…*
- *Promote London as a suitable location for European and other international agencies and businesses.'*

Offices

2.12 Policy 4.2, Offices, advises that the Mayor will and boroughs should:

- *'Support the management and mixed-use development and redevelopment of office provision to improve London's competitiveness*
- *Recognise… differences in implementing this policy to:*
  - *Meet the distinct needs of the central London office market, including the north of the Isle of Dogs, by sustaining and developing its unique and dynamic clusters….*
  - *Consolidate and extend the strengths of the diverse office markets elsewhere in the capital…*
  - *Encourage renewal and modernisation of the existing office stock in viable locations to improve its quality and flexibility;*
  - *Seek increases in the current stock where there is authoritative, strategic and local evidence of sustained demand.'*

2.13 The policy adds that Local Plans should

- '*Enhance the environment and offer of London's office locations…*
- *Provide the basis for... work to bring forward and renew development capacity as efficiently as possible, co-ordinating their activities and interests to avoid planning delays and facilitating site assembly, if necessary through the compulsory purchase process and especially beyond the central London office market…*
- *Work with sub-regional partners to develop… strategies to manage long-term, structural changes in the office market, focusing new capacity where there is strategic as well as local evidence of demand encouraging renewals and modernisation in viable locations and supporting changes of surplus office space to other uses.'*

2.14 Supporting text notes that London's economy is increasingly service-based hence '*ensuring there is enough office space of the right kind in the right places is a key task for the London planning system'.* For this, the Mayor '*encourages the renewal and modernisation of the office stock in viable locations in inner and outer London',* but also '*urges boroughs to manage changes of office space to other uses, providing overall capacity is sustained to meet London's long-term office needs*'.

2.15 In short, the London Plan considers Central London as the leading office location in the capital. Beyond central London, it draws a sharp distinction between 'viable locations' and other places. In the 'viable locations', the plan encourages renewal / modernisation of the office stock, and also new development provided that there is demand for it. In other places it recognises that demand may be weak, so some of the office stock is becoming surplus to requirement, and encourages managed release of that surplus stock to other uses.

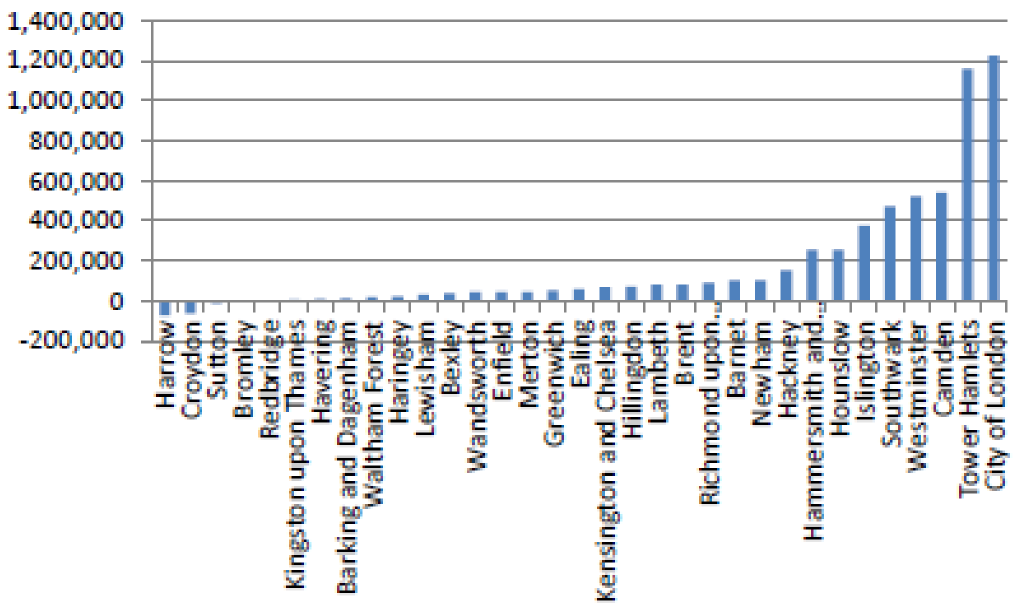
2.16 At paragraph 4.12 the plan provides examples of the most viable locations, which include:

- *'Mid-urban business parks such as that which has been developed at Chiswick*
- *Conventional business parks beyond the urban area, such as those at Stockley Park and Bedfont Lakes, which should work towards greater transport sustainability Existing linear office developments such as the 'Golden Mile'* [Great West Road] *in Hounslow, which should be made more sustainable in transport terms.'*

2.17 The London Plan's office policies are informed by the London Office Policy Review (LOPR), which provides in-depth analysis of offices markets across the capital, including long-term demand forecasts. The latest LOPR forecasts[5] were published in 2014, after the plan was finalised. They show office jobs in Hounslow from 2011 to 2036 increasing by 19,000 (50%), from 38,000 to 57,000.

2.18 Figure 2.1 shows LOPR's translation of this job growth into net new floorspace. For Hounslow this shows some 250,000 sq m over the 25-year period, putting Hounslow in 7th place among the 33 London boroughs. All the boroughs with greater office growth than Hounslow are in central or Inner London. For most other London boroughs the forecast growth is a fraction of that for Hounslow, and for five of them it shows no growth or a small decline.

Figure 2.1 Office floorspace demand; net new floorspace by borough 2011-36, sq m



Source: LOPR 2014, Figure 4-1 Change in Office Floorspace Demand (Sq m) by Borough 2011-36

2.19 In summary, the London Plan and associated evidence recognise Hounslow as an area of high office demand, with exceptional market potential compared to other

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5 Peter Brett Associates for Mayor of London, *London Office Floorspace Projections,* July 2014

parts of outer London. Specifically that potential relates to modern business parks – whether urban like Chiswick or out of town like Bedfont Lakes – and major 'linear office developments' like the Great West Road. In these areas the London Plan encourages renewal and modernisation of the office stock, and development of new offices if demand justifies it. In other places, including the rest of Hounslow, the Plan expects that there will be offices surplus to requirements and encourages managed release of that space to other uses.

Industry

2.20 Policy 4.4 of the London Plan advises that the Mayor will work with boroughs and other partners to:

- *'Adopt a rigorous approach to industrial land management to ensure a sufficient stock of land and premises to meet the future needs of different types of industrial and related uses in different parts of London, including for good quality and affordable space*
- *Plan, monitor and manage release of surplus industrial land where this is compatible with [the] above…'*

2.21 Supporting text in the plan implicitly recognises that the total land in industrial uses is falling, so significant amounts of industrial land will continue to be released for other uses. But it aims to ensure that enough industrial land remains to meet demand:

'*Even an increasingly service-based economy needs space for less high-value activities crucial to sustaining the city's metabolism, including 'services for the service sector', manufacturing and maintenance, waste management and recycling, wholesale and logistics. Sufficient space to accommodate demand for workspace suitable for SMEs and for new and emerging industries is also required…*

[Therefore] *the Mayor will promote a rigorous, evidence-based approach to reconcile demand and supply of industrial land and to take account of the needs of industrial and related uses…'*

2.22 To this end the Mayor has produced Supplementary Planning Guidance (SPG) to help ensure an adequate stock of industrial capacity to meet the future needs and to plan, monitor and manage the release of surplus industrial land. The Land for Industry and Transport SPG (2012) provides borough-level indicative industrial land release benchmarks.

2.23 The table below is extracted from the SPG, and identifies the benchmarks for the west London boroughs. The benchmark release figure for Hounslow is the second lowest in west London, but still forecasts that 15 hectares of industrial land could be released over the twenty year period to 2031 without restricting the supply of land for industrial uses.

Figure 2.2 Indicative industrial land release benchmarks 2011-2031, West London boroughs

Outer/ Inner	Borough	Historic release 2001-2006 (Ha)	Historic release 2006-2010 (Ha)	2010 Total Industrial Land Baseline (Ha)	Industrial land release benchmark 2011-2031 (Ha)	Annual industrial land release benchmark 2011-31 (Ha)	Integrated 2012 SPG borough grouping
O	Brent	-4	-37	411	-26	-1.3	Limited
O	Ealing	-6	-12	533	-24	-1.2	Limited
I	Hammersmith & Fulham	-14	0	172	-39	-2.0	Restricted with exceptions
O	Harrow	-1	-7	71	-14	-0.7	Limited
O	Hillingdon	-2	-9	430	-26	-1.3	Limited
O	Hounslow	-24	-7	496	-15	-0.8	Limited
	West Sub-region	**-51**	**-72**	**2,114**	**-144**	**-7.2**	

Source: Mayor of London, Land for Industry and Transport SPG, Annex 1. Indicative industrial land release benchmarks 2011-2031, 2011

2.24 The table shows that Hounslow is identified for 'limited' release, a category where boroughs are encouraged to manage and where possible, reconfigure their portfolios of industrial land, safeguarding the best quality sites and phasing release to reduce vacancy rates for land and premises towards the frictional rates.

2.25 Later in this report we review how well the Borough has managed industrial land release in the first four years since the SPG was published. This analysis may be of little relevance, because a new benchmark study is currently in progress and due to report soon.

Designations

Industrial designations

2.26 The London Plan identifies Strategic Industrial Locations (SILs) where industrial uses will be promoted, managed and, where appropriate, protected. Hounslow has three designated SILs:

- Two Preferred Industrial Locations (PIL) - Brentford (part) – Transport Avenue and the North Feltham Trading Estate, and
- One Industrial Business Park (IBP) – the Great West Road (part).

2.27 Development in SILs should be for industrial type activities unless alternative uses are promoted through an opportunity area planning framework or borough development plan document, or as part of a proposal for employment workspace that meets identified need for small and medium sized enterprises (SMEs) or new emerging industrial sectors. The plan acknowledges that while IBPs are not intended for large scale office development, they could be acceptable where they do not jeopardise local provision of light industrial accommodation where there is demand for these uses.

2.28 The importance of SILs in supporting logistics networks is identified as being essential to ensure London's economic competitiveness. SILs also have a critical role in providing land for waste management facilities.

Strategic Outer London Development Centres (SOLDC)

2.29 The Mayor identifies a number of SOLDCs across London that provide strategic economic functions. These areas are identified as possible sources of new economic growth or existing sources which with help could achieve a step change in economic performance.

2.30 The Great West Corridor is identified as providing a strategically important location for media activity. Hounslow as a whole is also identified as a potential SOLDC for logistics and other transport related activity.

2.31 The significance of this designation is that it attracts Mayoral support to explore the potential for strategically significant specialist economic growth.

Opportunity Areas

2.32 In the London Plan Opportunity areas are locations identified for major development or redevelopment. There is one such designation in Hounslow, the Heathrow Opportunity Area, which also extends across the borough boundary into Hillingdon. The plan says that the area has the potential to deliver a minimum of 12,000 jobs and 9,000 homes, rejuvenate Feltham town centre and develop the borough's strategically important industrial offer.

2.33 In addition the London Plan, with the Council's agreement, identifies a potential future Opportunity Area at the Great West Corridor, including the 'Golden Mile'.

The Local Plan

Spatial strategy

2.34 Hounslow's Local Plan was adopted in September 2015, and will be used to guide development to meet the significant growth in new jobs and other land uses that are forecast over the Local Plan period to 2030.

2.35 The plan identifies four parts of the borough as having major capacity for growth and change: Hounslow Metropolitan Centre, Brentford District Centre, the Great West Corridor including the 'Golden Mile', and the west of the borough. Development will also be directed towards the Borough's other town centres Feltham and Chiswick, albeit these have less capacity for growth than either Brentford or Hounslow.

2.36 While the plan seeks to focus economic development in the town centres, it also identifies improvements to transport and connectivity as important *'to support the principle of out-of-centre employment locations including on the Great West Corridor*, which is at the gateway to central London, and a hub for digital and media activity. The importance of Heathrow Airport to the local economy is acknowledged. The Local Plan refers to both the Great West Corridor and West of the Borough areas as having potential to augment housing delivery, but can also help to meet the need for other uses, including employment.

2.37 The Local Plan Inspector required the Council to undertake a partial Local Plan review to assess the potential of these two areas and make proposals for their future development. We discuss the Inspector's report and the partial review later in this chapter.

Policies

2.38 The two key Local Plan employment policies are Policy ED1 – Promoting Employment Growth and Development- and Policy ED2 – Maintaining the Borough's Employment Land Supply.

2.39 Policy ED1 directs new office development to the Borough's four town centres and new industrial development to the Borough's existing designated industrial areas and to other existing industrial sites.

2.40 The approach is to ensure that sufficient floorspace capacity is provided the meet the demand in key employment growth sectors. This policy will be achieved by directing new office development into the borough's four town centres, and by directing new industrial/ warehousing to the designated industrial areas. The broad category of 'employment based growth' will be promoted within the Great West Corridor.

2.41 We discuss the issue of town centre offices throughout this report, and conclude that this policy will not deliver its objectives.

2.42 Policy ED2's objective is to maintain the borough's supply of employment space. The approach to delivering on this objective is to consolidate the Borough's major industrial and office sites to secure the continued major representation of international companies, business headquarters and SMEs within the borough, and to take advantage of Heathrow Airport related supply chain opportunities.

2.43 This will be achieved by protecting compliant uses in the designated areas, and limiting the loss of employment space elsewhere to situations where it is clear that employment use is unviable (these and other designations are discussed in the next section).

2.44 The viability test requires active marketing of the site for employment uses for a period of at least two years in Key Existing Office Locations or for a period of at least one year in other locations.

2.45 The monitoring benchmark for the loss of industrial land is set at 6ha to 2030 to ensure that an adequate supply of industrial capacity is maintained in the borough throughout the Plan period.

2.46 Again the issue with the ED2 policy objective is the difficulties of maintaining employment floorspace in the town centres where as we show later in the report, demand for employment uses is very low, which generates the opportunity for alternative uses.

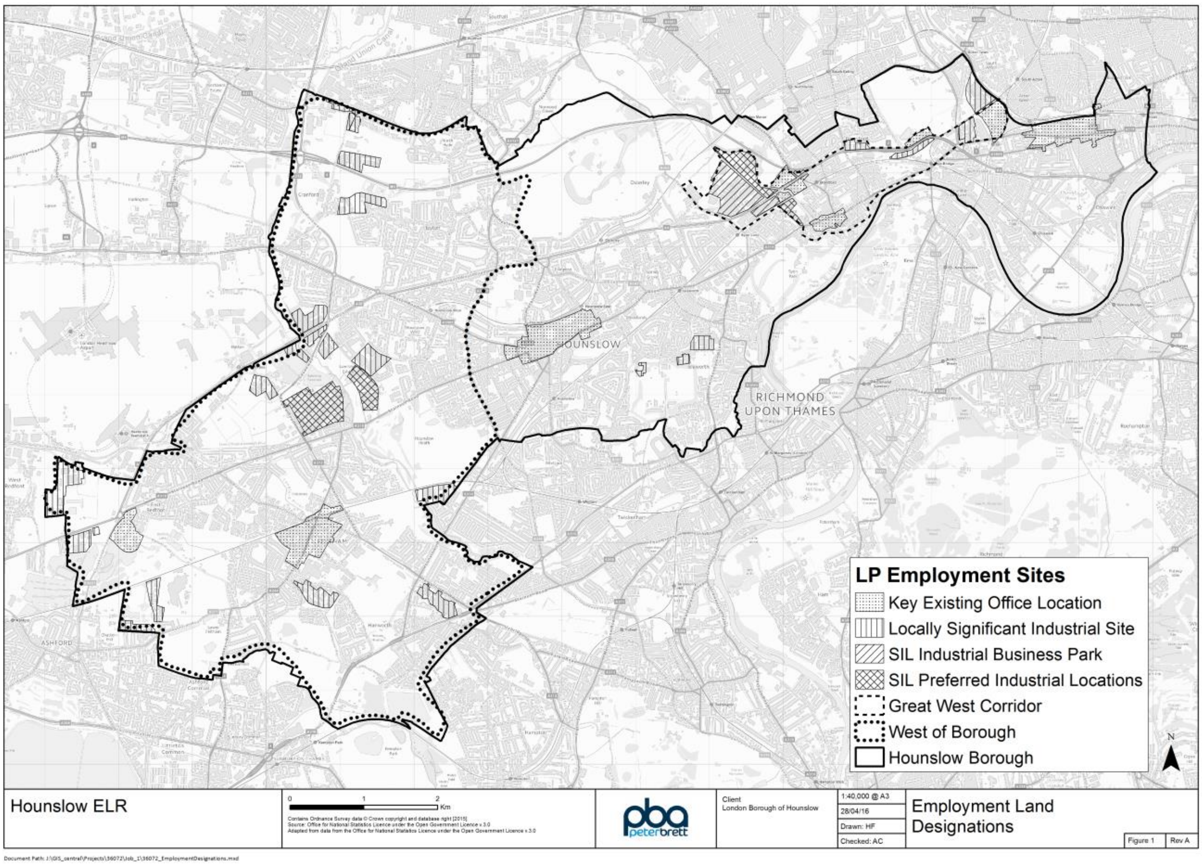
Designations

2.47 The Local Plan includes four types of employment land designations, as depicted in Figure 2.3:

- Preferred Industrial Locations (London Plan designation) - North Feltham Trading Estate and Transport Avenue, Brentford;
- Industrial Business Parks (London Plan designation) - the Great West Road (part of)
- Key Existing Office Locations – the four town centres, Bedfont Lakes, Chiswick Business Park and the Great West Road (2 areas).
- Locally Significant Industrial Sites (LSISs) – 36 sites in total.

2.48 There is a lot of employment space in non-designated areas elsewhere in the borough, but we do not have data on the distribution of the existing floorspace that can be used to identify the proportion of employment space in/outside designated areas. Given the large scale of some of the employment areas shown on Figure 2.3, it is likely that the majority of employment floorspace / land is located within designated and allocated areas. This is likely to be increasingly true in the future as the data discussed later in this study shows that employment floorspace losses have been much heavier outside of designated areas.

Figure 2.3 Employment designations in Hounslow



Source: PBA

Allocations

2.49 The Local Plan identifies 65 site allocations, approximately 20 of which promote employment use either entirely or as part of mixed use redevelopment.

2.50 The majority of these sites are located either in the town centres, other employment designations or in the two Local Plan areas. But a number of these sites have already been subject to planning or prior approval applications, and only sites 4 and 6, Hogarth Business Park and Sky have involved an increase in employment floorspace. The majority of the sites subject to planning / PD have experienced a reduction in employment floorspace.

2.51 Site 3 for example, Empire House is located within Chiswick town centre, and currently provides ground floor retail unit with 4,200sq m office above. The allocation is for mixed use retail, hotel or office and/or residential. The recently granted permission is largely for residential use with just 800 sq m of office floorspace. Site 36, Central House is a former office building that provided 8,100 sq m of office space, and was allocated for mixed use redevelopment including offices, residential, leisure and community uses. However, the site received prior approval for conversion to residential and the permission is currently being implemented.

Local Plan reviews

2.52 The Local Plan Inspector's report required the Council to prepare partial Local Plan Reviews to unlock the capacity for growth in two areas:

- the Great West Corridor – broadly covering the 'Golden Mile' from Chiswick including Brentford to Osterley; and
- the West of the Borough – a very large area which takes in the centres of Bedfont, Feltham, Cranford, Heston and Hanworth.

2.53 The Inspector noted that the plan under examination did not identify enough land to accommodate the office demand forecast by the previous Employment Land Review (2011). Additionally the plan did not identify any new land at all for industrial uses, including warehousing

'… *because the 2011 employment land review did not anticipate expansion in these areas… However as the Employment Land Review 2011 is increasingly out of date and is not reflecting current employment trends, that Plan will need to be informed by a new or updated Review which needs to address both the changing requirements for employment space for new emerging industries and the specific employment opportunities presented by proximity to Heathrow, especially if the airport should expand.'*

2.54 In short, the Inspector expects that Hounslow will need new land, over and above that identified in the current Local Plan, both for offices and industry. He advised that provision for both uses be made in the two plan review areas, and provision should be informed by a new or updated employment land review, which identifies what quantity and qualitative mix of land is needed. This advice is the starting point of the present employment land review.

2.55 The Council has recently consulted on issues papers for both areas with the objective of determining the location and sustainable quantum of additional employment (and residential) development above existing Local Plan levels for implementation through new site allocations.

2.56 The Local Plan Inspector said that the ‘existing employment land designations for part of the (Great West) corridor … are not fully aligned with the SDOC designation’. This was a clear requirement for the Council to consider the scope for growth in the area.

2.57 The primary objective of the Great West Corridor Plan is to promote employment growth, identifying what and where. The Plan identifies scope for considerable jobs growth particularly in the digital and media sectors associated with the area’s main employer Sky. But the wide range of employment opportunities is acknowledged from office-based at Sky and GlaxoSmithKline and the office campus at Chiswick Park to employment at the waste transfer station. Locations in Brentford are given as examples of areas within the Corridor that could accommodate more employment.

2.58 The Plan acknowledges that transport improvements will be needed if the area is to realise its potential for employment growth, especially in a competitive world for business location and where new locations such as Old Oak Common are coming forward that will offer an employment hub on the scale of Canary Wharf.

2.59 The West of the Borough’s broad geographical definition takes in about one third of the borough land area and all of Hounslow’s Green Belt. The area adjoining the airport is identified within the Heathrow Opportunity Area.

2.60 Jobs growth is a key objective for the Plan, with a focus on creating job opportunities in Feltham town centre. The Plan acknowledges that employment growth is dependent on providing the right kind of space in the right locations to allow for expansion / new entrants.

2.61 The Local Plan Inspector advised that the Council should *‘proactively plan for those areas surrounding Heathrow Airport’*. The obvious focus would be on Heathrow-related uses - logistics and high-spec offices. The Issues Paper acknowledges the continued opportunity for job creation presented by Heathrow, but that this would require land to be provided close to the Airport. Most undeveloped land in Hounslow close to Heathrow is in the Green Belt.

2.62 The Issues Paper refers to the Council’s Heathrow New Garden City vision that sets out a potential vision for ‘Heathrow Gateway’ and ‘Airport Business Park’ on the southern side of the Airport to create employment opportunities in high specification office space as well as in logistics and distribution, and servicing the Airport.

Conclusions

2.63 Strategic policy, both at national level and in the London Plan, indicates that:

- Hounslow Council, like all local planning authorities, should actively and positively support economic growth, including by doing all it can to meet the demand for employment land.
- To this end the Council should work co-operatively with neighbouring authorities, especially its partners in the functional economic area (FEMA) and other stakeholders including business interests.
- Much of the demand for new land in the borough will be in the office sectors. In relation to these sectors Hounslow has exceptional growth potential, partly related to emerging industries such as media and digital.
- Some industrial land will become surplus to requirements and should be released for other uses. The Mayor's SPG identifies that 15ha can be released in Hounslow in the period to 2031. But local planning authorities must manage such releases to ensure that supply does not fall short of demand. For this they must protect industrial land which is still needed, and if there is demand for new land they should provide it.
- Both for offices and industry, the Council should plan, monitor and manage the release for other uses of employment sites which are no longer suitable or in demand for employment.
- The London Plan gives spatial expression to these principles through a range of formal designations.

2.64 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. To answer this question is the main objective of the present study.

2.65 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.

3 THE FUNCTIONAL ECONOMIC MARKET AREA

What is a Functional Economic Market Area?

3.1 Planning for the economy is most effectively done when considered on a wider than local context. In recognition of this the Planning Policy Guidance (the PPG) advises that the needs of economic land uses – which include employment uses – should be assessed at the level of Functional Economic Market Areas (FEMA) rather than individual local authorities. The PPG's explanation of what these areas are takes up a single sentence:

'The geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing demand and supply – often referred to as the functional economic market area.'[6]

3.2 The above sentence does not state clearly what a FEMA is or why it is useful. The gap is partially filled by an earlier Communities and Local Government (CLG) guidance note, published in 2010, on which the PPG is clearly based[7]. The note provides a clearer definition and rationale for the concept of a FEMA:

'Economic flows often overlap local authority boundaries. This means that the functional area over which the local economy and its key markets operate will not necessarily adhere to administrative boundaries. Instead, key economic markets broadly correspond to sub-regions or city regions - known as functional economic market areas (FEMAs)…

Whereas the national or regional level is often seen as too large to tackle many of the issues facing individual urban economies, local authority areas can be too small if they cover a smaller geographical area than their economic markets. Policies designed at a local authority level, for example, may not fully consider the costs and benefits of implementing a policy if this spreads beyond their administrative boundaries. This can make it harder to tackle economic challenges effectively.

If economic policy is formulated at the FEMA level, as a closer fit to the area's real economic market, most of the impacts of the policy area will be contained. There will be less risk of local policies which are against the wider sub-regional or national interest, and local partners will be able to make more strategic decisions on economic development.'

3.3 Thus, the purpose of defining a FEMA is to allow the FEMA partner authorities to align policies in relation to new and existing employment sectors to promote the growth in employment for the collective good. In this regard it will be easier to

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[6] Paragraphs 8 and 12 of the PPG, 6th March 2014

[7] Communities and Local Government, *Functional Economic Market Areas*, An economic note, February 2010, ISBN: 978-1-4098-2201-1

undertake the demand supply balance across a wider than local market area as this may involve 'trading' future growth in the various employment sectors.

Defining the FEMA

Methods and criteria

3.4 The PPG advises that there is no standard approach to defining individual FEMAs, but factors that '*it is possible*' to take into account include:

- Coverage of Local Enterprise Partnership
- Travel-to-Work Areas
- Housing market areas
- Flows of goods, services and information
- Service market for consumers
- Administrative areas
- Catchment areas of cultural and social facilities
- The transport network.

3.5 But when it comes to hard data the PPG suggests a single source for defining FEMAs - the ONS Travel-to-Work Areas (TTWAs), which are based on commuting only. It seems reasonable to assume that this is not intended as exhaustive, and therefore it does not imply that other data sources could not be useful or relevant. We explain below why the other factors are much less helpful in Hounslow's case, but first we explain why TTWAs are helpful.

3.6 The CLG note provides useful clarification, beginning with the labour market angle:

'The most widely accepted approach to identifying FEMAs is by reference to Travel to Work Areas (TTWAs), which are relatively self-contained, internally contiguous labour market areas. A commonly used definition is that: of the resident economically active population at least 75 per cent work in the area; and of all those working in the area at least 75 per cent also live in the area…

TTWAs are often treated as the default definition of FEMAs for two reasons:

- *The labour market is fundamental to policy-relevant definitions of FEMAs… and*
- *TTWAs are the only sub-regional economic area robustly defined under the remit of National Statistics.'*

3.7 This explanation is important. As mentioned earlier, the rationale for FEMAs is that the planning policies of any given local authority are likely to impact on other local authorities within the same market area. The main instance of such cross-boundary impacts relates to the labour market. Because many people live in one local authority district and work in another, if an authority provides development land for economic uses the businesses that eventually occupy that land will provide jobs for residents of neighbouring authorities. This is an important reason why travel to work (commuting) is the main criterion in defining FEMAs.

3.8 After travel to work the CLG economic note goes on to discuss other relevant criteria, which are identical to the PPG factors listed at para 3.4 above, except for one that the PPG calls *'flows of goods, services and information*' in the CLG note is called *'supply chains in industry and commerce'.* The note comments on the different factors as follows:

- With regard to housing it explains that there is no agreed method for defining market areas, but the National Housing and Planning Unit has recently commissioned a study to develop such a method. We note that the NHPAU study was published later in 2010 and does indeed provide a comprehensive set of housing market areas (HMAs), based on analysis of migration and commuting in the 2001 Census. Unfortunately the NHPAU study has not been replicated using the 2011 Census data, so the original 2010 study based on the 2001 Census is the latest top down national set of HMAs..
- In relation to supply chains, the note advises that the evidence is '*very difficult to map': input-output tables provide a method that 'may be viable, but it is questionable whether the information [they provide] has much value, since it is not based on data about real links*'.

3.9 Regarding service markets for consumers, the note makes it clear that the subject is relevant to consumer services such as shopping centres, airports, concert halls or hospitals, rather than the employment (B-class) uses that this study focuses on.

3.10 The note suggests that analysis should take account of local authority boundaries, because the decisions that are informed by that analysis will be taken by local authorities. Therefore it recommends that FEMA boundaries be 'best fitted' to local authority areas.

3.11 Finally the note advises *that 'transport data are not the best data sources for FEMA definitions'… the key role of transport will be reflected using other FEMA definitions, such as TTWAs, as these flows are partly shaped by transport availability*'.

3.12 Based on these discussions of different indicators, the 2010 economic note concludes that the best way to define FEMAs may be to

'Analyse Census commuting or migration data, as the most complete and reliable flow data, and supplement them with data from other economic markets'.

3.13 The other factors referred to at paragraph 3.4 above are the Local Enterprise Partnership and the HMA, but these are London-wide, and so do not help us define Hounslow's FEMA.

3.14 In summary, the complexities of an outer London location mean that none of the factors are helpful in defining the FEMA with the exception of the TTWA data, which is helpful and also the administrative boundaries because data is most readily available at local authority area and the main purpose is to inform policy at local authority level.

3.15 Our proposed definition of the FEMA is therefore based mainly on commuting data and administrative boundaries. The objective is to identify an area that is reasonably self-contained in terms of commuting flows, and which also best fits the administrative boundaries.

3.16 Additionally, and in line with the CLG note we also look at data from other economic markets, in this case because we are dealing with land and buildings we sought views from the property industry, to supplement and sense check the TTWA and administrative area data. we look to.

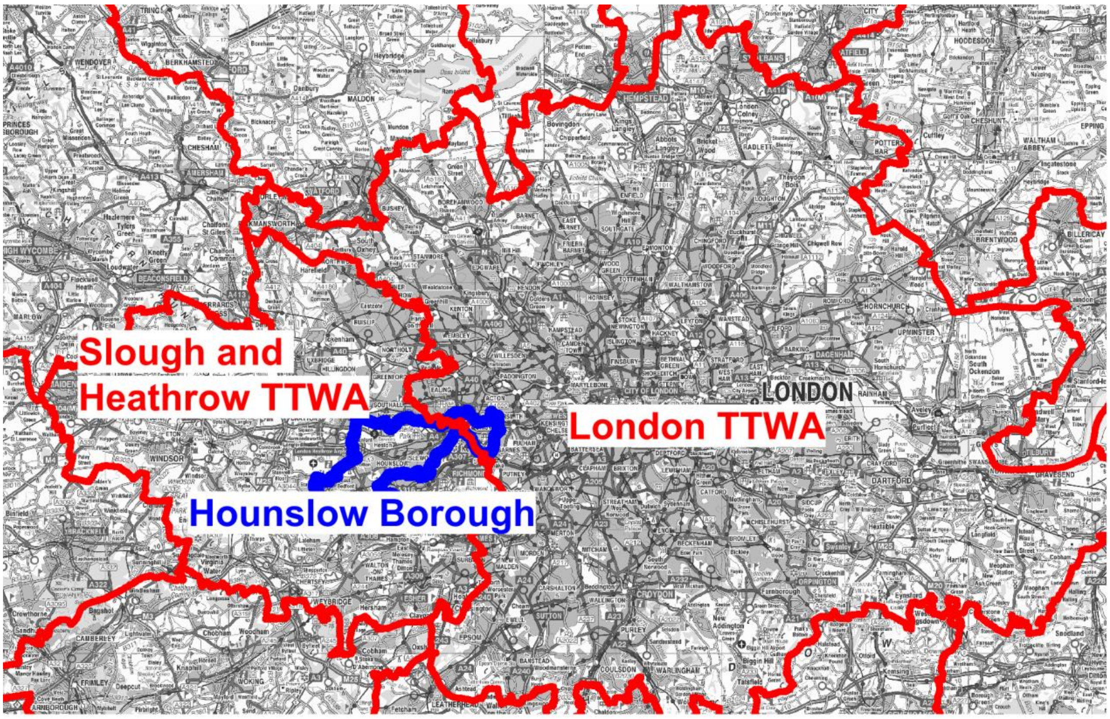
Defining Hounslow's FEMA

Travel-to-Work Areas

3.17 The objective is to identify the most contained commuting area that is best fit with the administrative boundaries. The first step is to look at the ONS derived TTWAs. The latest TTWAs published in 2015, are based on data from the 2011 Census. Hounslow straddles the boundary of two TTWAs:

- London, an area that extends beyond the administrative area of Greater London and beyond the M25;
- Slough and Heathrow, an area centred on the airport .

Figure 3.1 TTWAs close to Hounslow



Source: ONS *Travel to Work Areas, 2015.*

3.18 This official geography is interesting, because it shows that Hounslow faces two ways: its links are both to the London economy and to Heathrow and the M4/M3 corridors to the West. Only the eastern end of the borough is in the London TTWA, while the majority of the borough is in the Slough/Heathrow TTWA.

3.19 We cannot use the TTWA boundaries directly to define a FEMA:

- If geographic best fit were the only criterion, we could use the Slough/Heathrow FEMA as this covers the majority of the borough. But, while this reflects the borough's close relationship with Heathrow and the M4/M3 corridors, it would ignore the very different nature of the eastern end of the borough and the strong links with Central London and some of the west London boroughs.
- Nor would it be sensible to split Hounslow between two FEMAs. Such an arrangement would greatly complicate planning, including co-operation with other authorities. For practical reasons, FEMAs should be best-fitted to local authority boundaries.

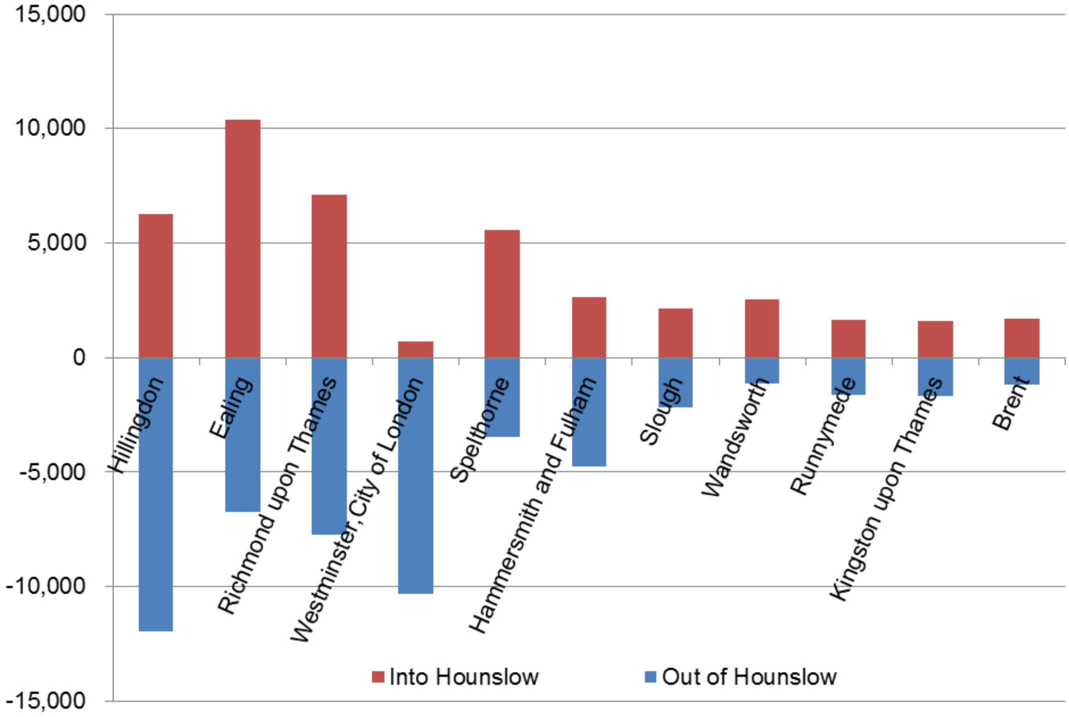
3.20 To define a FEMA that is useful for planning purposes, therefore, we must set aside ready-made TTWAs and look directly at commuting flows. In the next section we analyse these commuting flows, aiming to identify an area that is relatively contained in terms of 'to and from' commuting flows.

Commuting geography

3.21 As is typical for London boroughs, Hounslow is a very open labour market. The 2011 Census reports that there are approximately 127,000 working residents in the borough, of whom 24,000 are either home workers or have no fixed workplace. Of the remaining 103,000 working residents, only 31,000 work in Hounslow filling less than a third of the 105,000 jobs based in the borough.

3.22 Figure 3.2 below shows the geography of the top eleven commuting to and from Hounslow. Beyond the top eleven flows between Hounslow and other boroughs are much lower.

Figure 3.2 Commuting flows to and from Hounslow, persons, 2011



Source: ONS, Census WU01EW - Location of usual residence and place of work by sex (MSOA level)

3.23 The major flows out of Hounslow (blue bars) are to other London boroughs: Hillingdon, Ealing, Richmond, Central London - Westminster and City of London, and Hammersmith & Fulham. Outside the London boundary there are smaller, but still significant flows to Spelthorne and Slough. Beyond the boroughs mentioned above out flows to other London boroughs such as Wandsworth and Brent are weaker.

3.24 Flows into Hounslow (red bars) show a similar pattern, except that the City and Westminster export very low numbers of commuters to Hounslow. Again the key flows into Hounslow are from Hillingdon, Ealing, Richmond and Spelthorne. Flows in from Hammersmith & Fulham are comparatively much weaker, as they are from Slough and other London boroughs such as Wandsworth and Brent.

3.25 In defining the FEMA, it is reasonable to exclude Central London because this would require inclusion of the whole of London and some areas beyond. Similarly the comparatively weak links to Wandsworth and Brent do not provide the basis for consideration as a partner in a FEMA with Hounslow.

3.26 The prime candidates for FEMA partners are the six other local authorities that have the strongest commuting links with Hounslow – comprising Hillingdon, Ealing, Richmond, Spelthorne, Hammersmith & Fulham and Slough. In Tables 3.1-3.3 below we assess self-containment rates for different combinations of these authorities. The calculations include people who work at home, but exclude those with no fixed workplace.

3.27 The PPG does not say what level of containment is sufficient to identify a FEMA. Our analysis is guided by the criteria that are used to define TTWAs. To qualify as a TTWA an area should have a minimum containment ratio of 75%, which means that at least 75% of workers who live in the area also work in the area, and conversely 75% of people who work in the area also live in the area. But for areas with a working population above 25,000 the threshold falls to 66.7%. This is the threshold used in our analysis, because all the possible FEMAs that we consider have a working population above 25,000.

Table 3.1 Commuting self-containment, 2010-11 – Hounslow alone

Origin (trips from)	Destination (trips to)			
	Hounslow	Elsewhere	Total trips from Hounslow	**Origin containment**
Hounslow	42,361	71,690	114,051	**37%**
Elsewhere	74,239			
Total trips to Hounslow	116,600			
Destination containment	**36%**			

Source: ONS, Census WU02UK - Location of usual residence and place of work by sex (2011)

3.28 Containment levels are very low for Hounslow when it is considered alone, with just over one third of jobs in the borough filled by Hounslow residents (refer to Table 3.1 above).

3.29 Central London is a major draw for workers in the borough with over 10,000 commuting to Westminster and the City with other Central London boroughs drawing significant numbers of Hounslow's work force. If Westminster and the City are excluded from the analysis origin, Hounslow's containment rises by approximately ten percentage points, to just below 50%.

3.30 A FEMA based on the six adjoining boroughs produces containment rates still some way off the threshold rate of two-thirds of all commuter trips. Hammersmith & Fulham, an inner London borough, has relatively weak commuting links with the rest of the FEMA, and much stronger links with Central London boroughs. Because of the much higher overall commuter numbers travelling to and from Hammersmith & Fulham for work (150,000) compared to Spelthorne or Slough (70,000) the relative strength of the link to Hounslow and the other boroughs listed in Table 3.2 below are weaker and 'diluted' by the much higher number of commuters going elsewhere.

Table 3.2 Commuting self-containment, 2010-11 – six-borough FEMA 1

Origin (trips from)	Destination (trips to)			
Hounslow, Hillingdon, Ealing, Spelthorne	"the area"	Elsewhere	Total trips from "the area"	**Origin containment**
Richmond, plus Hammersmith ("the area")	349,830	257,239	607,069	**58%**
Elsewhere	260,122			
Total trips to "the area"	609,952			
Destination containment	**57%**			

Source: ONS, Census WU02UK - Location of usual residence and place of work by sex (2011

3.31 An alternative FEMA partnering arrangement that more closely aligns with the TTWA data is the six areas identified in Table 3.3 below.

Table 3.3 Commuting self-containment, 2010-11 – six-borough FEMA 2

Origin (trips from)	Destination (trips to)			
Hounslow, Hillingdon, Ealing, Richmond,	"the area"	Elsewhere	Total trips from "the area"	**Origin containment**
Spelthorne plus Slough ("the area")	342,670	233,799	576,469	**59%**
Elsewhere	218,714			
Total trips to "the area"	561,384			
Destination containment	**61%**			

Source: ONS, Census WU02UK - Location of usual residence and place of work by sex (2011

3.32 Containment in this alternative FEMA arrangement is marginally higher than the combination that included Hammersmith & Fulham. Therefore Slough has stronger commuting links with the other FEMA partners compared with Hammersmith & Fulham. But even so containment rates remain resolutely below the TTWA threshold.

3.33 We have also tested containment rates if we include all seven boroughs. The effect of this as shown on Table 3.4 is to marginally reduce overall containment, because commuting to and from Hammersmith and Fulham is widely spread across many local authorities.

Table 3.4 Commuting self-containment, 2010-11 – seven-borough FEMA

Origin (trips from)	Destination (trips to)			
Hounslow, Hillingdon, Ealing, Richmond,	"the area"	Elsewhere	Total trips from "the area"	**Origin containment**
Spelthorne plus Hammersmith & Slough ("the area")	397,693	270,385	668,078	**60%**
Elsewhere	280,817			
Total trips to "the area"	678,510			
Destination containment	**59%**			

Source: ONS, Census WU02UK - Location of usual residence and place of work by sex (2011

3.34 Therefore highest containment rates are achieved by the six borough FEMA set out in Table 3.3 above.

3.35 In summary, the analysis of commuting flows suggests that the FEMA should combine Hounslow with:

- Hillingdon, Ealing, Richmond and Spelthorne, and
- possibly Slough and Hammersmith & Fulham.

3.36 Commuting flows with Slough are the weakest of the named boroughs, but are higher than flows with all other boroughs. The inclusion of Sough in a FEMA with Hounslow and Hillingdon makes sense because they are included together in the ONS TTWA assessments, and there is a focus of industrial activity in the eastern part of Slough closest to London. We therefore conclude Slough should be included in the same FEMA as Hounslow.

3.37 But the inclusion of Hammersmith & Fulham reduces containment because that borough has very wide ranging commuting flows and stronger links with other Inner London boroughs and Central London, and should not be included in the same FEMA as Hounslow.

3.38 No other borough has strong enough links with Hounslow and its five FEMA partner boroughs to warrant inclusion in a FEMA with Hounslow.

Market perspectives

3.39 To help identify the FEMA, we also considered views from the property industry, as expressed at the stakeholder workshop conducted as part of this study and in one-to-one consultations.

3.40 From a property market perspective, the FEMA is best understood as an area of search – a geography in which businesses typically look for accommodation, and hence sites compete directly with each other for occupiers. Our consultations suggests that such areas of search vary, depending on the type of business concerned:

- Small and medium businesses that serve local markets generally have small areas of search, perhaps limited to Hounslow itself or parts of Hounslow.
- Large-scale warehouse logistics operators have a wide area of search, centred on Heathrow and the M4/M3 corridors extending beyond Hounslow to include boroughs such as Ealing and Brent, and extending along the M4/M3 beyond London. This is illustrated by the example of two businesses that recently decided to relocate out of Hounslow to larger facilities. DHL is in the process of moving to Poyle Trading Estate in Slough, and Brompton Cycles is leaving Hounslow for Greenford in Ealing. For these businesses, a location in Hounslow is evidently interchangeable with locations in Slough or Ealing.
- Similarly in the office market, part of the large international business market is primarily driven by proximity to Heathrow, which means they are footloose within west London and beyond – including parts of Surrey and Buckinghamshire as well as the Thames Valley. The success of Bedfont Lakes and Stockley Park illustrates the demand for office space close to Heathrow. But the main office market looks to Inner and Central London, and in Hounslow is focused on the east end of the borough where office locations are interchangeable with locations in neighbouring Hammersmith & Fulham.

3.41 These views generally support the idea of a FEMA centred on Heathrow that combines Outer West London with the M4/M3 corridors. More specifically, of the two alternative definitions suggested above they support the one at Table 3.3, which groups Hounslow with Hillingdon, Ealing, Richmond, Spelthorne and

Slough. Slough seems a more suitable partner in the FEMA because it shares with Hounslow its proximity to Heathrow airport and the resulting concentration of strategic warehousing and logistics.

Conclusions

3.42 Identifying FEMAs for London boroughs is difficult because of the wide range of the commuting flows and the draw of Central London for workers. But the Framework requires boroughs to identify the most practical FEMA, which requires a pragmatic view.

3.43 The analysis of the TTWA maps and the commuting flows data suggests 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 and M3 corridors for industrial and largely proximity to Inner and Central London for offices, but not entirely.

3.44 Thus, we recommend the FEMA should include Hillingdon, Ealing, Richmond, Spelthorne and Slough as well as Hounslow.

3.45 This is the best fit FEMA, but because the Guidance is not prescriptive in how the FEMA should be defined and because the objective is to ensure the best planning policy outcomes for encouraging employment growth across the FEMA, other possibilities could be pursued including options with Hammersmith & Fulham, and / or Brent. Neither borough has strong commuting flow links with either Hounslow or the other boroughs listed above. However, there are linkages and similarities in terms of office employment between Hounslow and Hammersmith and Fulham, and between Hounslow and Brent in terms of industrial uses.

3.46 In line with the PPG, the need for employment land should be assessed at the level of this area rather than individual local authorities. But where different authorities' planning timetables do not match single-authority assessments are acceptable, provided that the authorities have regard to each other's evidence bases and aim to synchronise the next round of plan-making. Therefore, under the Duty to Co-operate the Council should share the findings of the present study with the other authorities in the FEMA, and work with them to resolve any imbalances between the supply and demand of employment land across the FEMA.

4 PROPERTY MARKET PROFILE

Introduction

4.1 As noted earlier, the main purpose of this study is to assess the future demand and need for employment land over the plan period. For practical purposes these terms are synonymous. They mean the quantity and qualitative profile of land that occupiers will want to occupy and landowners and developers will want to offer over the next 15 years. In line with the NPPF the local planning authority should allocate enough land for employment to meet that need in full, provided that the area has enough sustainable capacity.

4.2 We approach the question in two stages:

- In this chapter we analyse the current property market, considering the demand for land and floorspace from business occupiers, the supply provided by landowners and developers and the balance between the two. This market balance drives the need for additional employment land. Where effective demand exceeds the land currently in employment use, there will be scope for new development and a resulting demand for additional land.
- In the next chapter we look further ahead, to compare the likely demand over the plan period with the planned allocated for development.

4.3 We deal separately with two types of employment space:

- Offices (B1a)
- Industrial space, which covers light industry (B1c), general industry (B2), warehousing (B8), along with Research and Development (B1b) uses.

4.4 These two types of space represent distinct markets, featuring different market drivers. These markets are characterised by different types of property – offices and industrial warehousing. These each generate demand from different types of occupier.

4.5 For each of these markets, and for sub-markets within them, we discuss in turn:

- Profile of occupier demand – what types of businesses are attracted to different parts of the borough, what they are looking for and how well their needs are met.
- The balance of the market, to see where there is viable demand for new employment development, and conversely where existing sites are no longer in demand and viable.

4.6 Our assessment of market balance is based on analysis of market transactions and discussions with agents and stakeholders experienced in the local market. For market transactions, we use the property market database EGi. This resource records data on take-up and availability. Analysis of this data allows us to identify market trends. Qualitative research involved telephone consultations with a number of local agents. We also conducted a stakeholder workshop where local businesses, developers, investors, council members and agents contributed their opinions and knowledge of the market. These discussions allow us to form a view on whether the market is likely to follow past trends. They also provide an understanding of any subjective issues influencing the market. In order to establish pipeline supply, we have used data from the London Development Database, provided by the Council and last updated in December 2015.

4.7 As main indicators we use rental values, recent take-up and floorspace availability (vacancy). In a property market context, 'take-up' means the occupation of business floorspace. Here, take-up includes the leasing of both new-build property and secondary space. Secondary space represents the larger share of the market.[8] This distinction is important because in a planning context 'take-up' refers to the quantity of land developed to provide new property. Similarly, 'availability' refers to the floorspace represented by marketed properties. This includes both new and second-hand space. It does not cover development sites, unless they are being offered on a design-and-build basis.

4.8 In markets where take-up and rents are high and availability is low, there will likely be demand for more land. Conversely, if take-up is low, there is much floorspace available and rents are too low to support new development, or even the maintenance of existing buildings, then land may be surplus to requirements and should perhaps be released for other uses.

Background

4.9 Hounslow benefits from strong transport links by road, rail and air. These high quality transport links are central to employer decisions to locate in the borough.

4.10 Commercial demand is strongest at either end of the borough. At the eastern end Chiswick is a very successful office market, centred on Chiswick Park which offers high quality large floorplate offices in a campus environment and is home to occupiers such as Aker Solutions, CBS News and Ericsson. The location shares high-quality road, rail and tube connections with Central London. It also has strong orbital transport links connecting to important centres such as Richmond.

4.11 At the western end of the borough demand is focused on logistics and distribution because of the close proximity to Heathrow Airport. The freight movements associated with Heathrow have generated substantial demand for larger cargo sheds from occupiers such as DB Schenker. In recent years the needs of internet retailing have added substantially to the demand for distribution space.

4.12 Hounslow's locational advantages generate strong demand for property, but these benefits are not unique, and locations in Hillingdon or Ealing for example can be equally attractive to employers. The property market is not defined by

[8] 'Secondary' stock refers to older, second-hand stock. This includes refurbishments.

administrative boundaries, and occupiers are often footloose across West London and beyond.

Offices

Overview

4.13 Demand for offices in Hounslow is strongly location-dependent. In the east, the market is dominated by Chiswick, the strongest office location in the borough. But there is also a market for secondary offices[8] on the Great West Road. To the west, strong links with Heathrow support the success of Bedfont Lakes. Beyond these key areas the office market is weaker. In particular, the town-centres suffer from lack of demand.

4.14 In the more successful locations, such as Chiswick Park and Bedfont Lakes, office property consists of larger-floorplate, modern office buildings on campus-style developments. Hounslow and Brentford town centres[9] mainly feature older secondary office stock.

4.15 In the more successful office locations the supply of modern floorspace is running low. Although developers are willing to provide larger grade A space in strong locations, they hesitate to provide high quality space for smaller businesses. It is also clear that there is limited availability of land.

4.16 Hounslow offers occupiers strong transport links with Central London and Heathrow Airport. In addition to the quality of office space available, these benefits have helped attract large occupiers such as Sky, IBM and the Discovery Channel.

4.17 The table below shows that in the post-recession period the market has remained robust, generating an average yearly take-up of around 40,000 sq m. But, there is a dip in take-up in 2015. This is due to the larger nature of corporate spaces and is explained more fully in paragraph 4.24 below.

[9] In this chapter, the term ‘town centre’ is used to widely refer to the town centre and associated area. This may refer to locations beyond the strict town centre boundary, as designated in planning policy.

Table 4.1 Annual office take-up, Hounslow, sq m

Year	Total take-up (sq m)
2010	45,274
2011	34,416
2012	50,529
2013	34,500
2014	31,170
2015 (Until October)	14,990
Total	**210,879**
Average take-up (2010-2014)	**39,178**

Source: EGi/PBA (2015)

4.18 Demand in Hounslow is defined by two types of occupier. The first are large, national and international corporate businesses. The second are small to medium-sized businesses.[10] These businesses represent a variety of sectors, but demand is currently driven by the digital, media and broadcasting sectors. Below, we consider these markets in turn.

Corporate occupiers

Demand

4.19 These occupiers are spread across a wide variety of sectors. Pernot Ricard, PepsiCo and Disney are examples of companies that have taken space in Hounslow.

4.20 These occupiers are footloose. Hounslow must compete with office locations in Greater London and beyond, and to a lesser extent central London.

4.21 This type of business will look for floors within larger office buildings, or entire office blocks for use as headquarters. Some businesses will sub-divide floors in larger offices. Take-up ranges from units of around 500 sq m to an entire building of circa 20,000 sq m. It has been reported in January 2016 that Danone is to take 3,900 sq m of space at Chiswick Park. The business will occupy the 5th and 6th floors of the recently completed Building 7. Recent market reports also indicate that Time Warner has also shortlisted space in Building 7 for their 18,600 sq m requirement.

[10] This submarket includes microbusinesses insofar as these businesses use commercial property as opposed to working from owners homes. Home working is beyond the scope of our study.

4.22 Although the market is defined by different occupier profiles, levels of take-up cannot be disaggregated and analysed by type of occupier because details are not consistently recorded in market data. Instead, take-up is analysed by the sizes of space taken. As larger corporate occupiers take space from around 500 sq m in Hounslow, deals involving spaces above this threshold are considered to represent the take-up of corporate space.

4.23 The average yearly take-up for larger corporate spaces is 32,822 sq m (Table 4.2). Yearly take-up fluctuates slightly, but this tends to be due to the fact that larger floorspaces are involved in single deals. Generally, take-up is consistent.

4.24 Although demand has remained fairly consistent in recent years, take-up was lower throughout 2015. This can be attributed to the fact that Bedfont Lakes is now fully let and limited space has been available at Chiswick Park – the completion of Building 7 was only announced in September 2015. Until this new stock was delivered, supply of this type of space was constricted. Take-up for corporate space involves larger floorplates, meaning that when there is limited space to be taken, take-up looks to drop more dramatically.

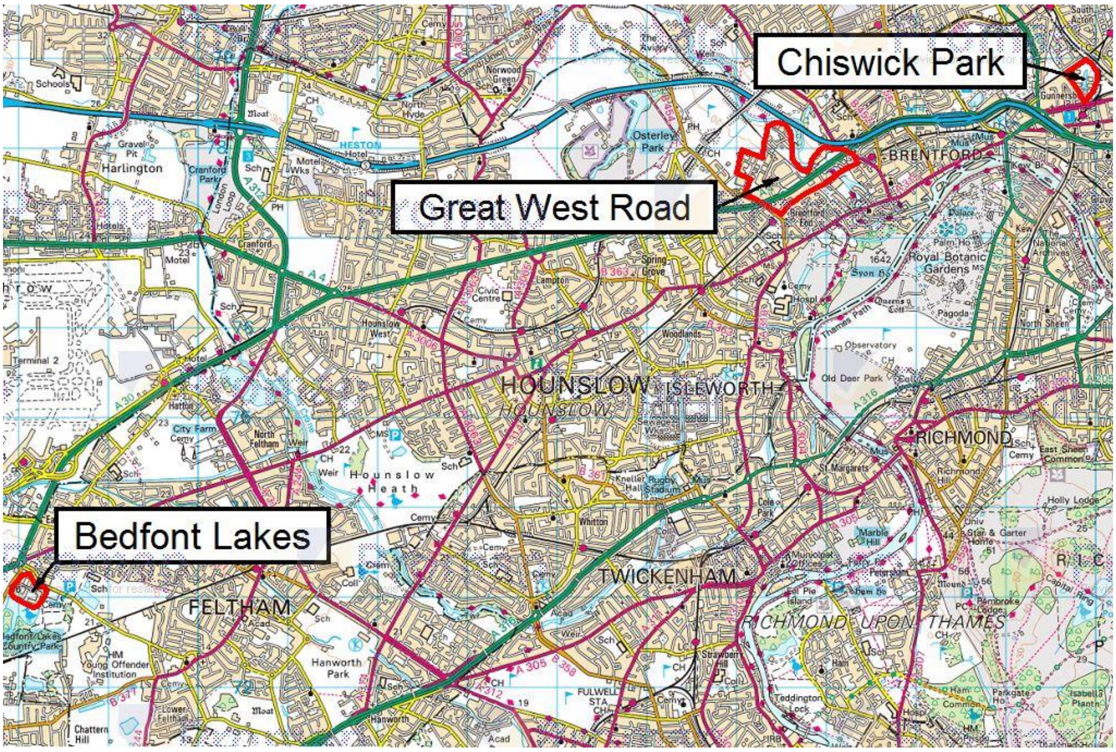
Table 4.2 Annual office take-up (units over 500 sq m)

Year	Total take-up (sq m)
2010	39,354
2011	27,568
2012	41,803
2013	30,858
2014	24,528
2015 (Until October)	10,203
Total	**174,314**
Average take-up (2010-2014)	**32,822**

Source: EGi/PBA (2015)

4.25 As mentioned earlier there are two key locations in Hounslow which are the focus of demand from this type of occupier. These are Chiswick Park in the east of the borough, and Bedfont Lakes in the west.

Figure 4.1 Key corporate office locations



4.26 Chiswick Park is popular due to the high-quality, modern offices on offer. Offices here feature large, open-plan floorplates of circa 2,500 sq m. This location also benefits from exceptional transport links. Connected to London by road, tube, bus and rail, Chiswick Park has strong east-west and north-south links. It is also well located in terms of giving access to Heathrow Airport. Another reason occupiers choose this development is due to its campus-style environment. In addition to a feature lake, the site offers a gym, events space, amenities, and inter-office sports league. These features are deemed important because occupiers are keen to take space which is attractive to potential employees. Rents here reach as high as £562 /sq m (Table 4.4).

4.27 Bedfont Lakes has been successful for similar reasons. It offers modern, grade A office space with floorplates of circa 1,500 sq m. It is located out of town, but close to Heathrow Airport, which is a major advantage. Occupants benefit from a complementary shuttle bus to the airport, as well as local train stations. Bedfont Lakes also offers a welcoming environment including a café area. All offices here have now been fully let. The last occupier to take space was BP, who took 2 New Square in 2013. Space here has achieved rents of £350 /sq m (Table 4.4).

4.28 Lower rents at Bedfont Lakes can be explained by the location of this development. Because Chiswick Park is suburban and located close to London, rents here are higher. Chiswick also benefits from stronger public transport links. In contrast, Bedfont Lakes is in an out-of-town location further from central London. It is also more poorly connected by public transport.

4.29 Chiswick Park and Bedfont Lakes are both respected and recognised as prestigious office locations. Occupying space next to other large, successful businesses is viewed as having the potential to bolster a company's image and reputation.

4.30 Demand for property at these two key locations highlights the features which generate demand in the current market:

- High quality, grade A floorspace.
- Large, open-plan floorplates (1,500-2,500 sq m).
- Connectivity (via road, rail, tube and bus).
- Campus-style, controlled environments.
- Access to amenities.
- Prestige.

4.31 As noted in paragraph 4.13, there is also a market for offices on the Great West Road. Historically this was a very strong office location, but the market has turned in recent years. Although demand has been weaker, this area has had success and is showing signs of improvement. New development here can be attributed to one major occupier, Sky. Its extensive Osterley Campus represents significant investment: 115,000 sq m of office floorspace was added in 2015 alone. Although a strong employment location, Sky's site is different to locations such as Chiswick Park and Bedfont Lakes which offer pristine, 'shiny' office space. This site is a mix of studio space and light industrial units, in addition to office space.

4.32 Elsewhere on the Great West Road, office property is generally secondary. Although there have been recent refurbishments, there has been little development of new-build space. However, refurbished space performs fairly well in this location.

4.33 Agents report that although there is demand for space on the Great West Road, it is weaker than in Chiswick Park and Bedfont Lakes. Occupiers will take space when there is no availability in stronger locations such as Chiswick, or when the business cannot afford the rents in primary locations.

4.34 Although the Great West Road has attracted major businesses such as GlaxoSmithKline in the past, many potential occupiers view the offices and infrastructure as outdated. More specifically, access poses a problem. The area has poor public transport connections, and access to many offices is difficult without the use of a car. Sky chooses to combat poor accessibility by running shuttle busses between its campus and tube and rail stations. Another issue is lack of availability of amenity and servicing space in the area.

Supply and market balance

4.35 We have seen that there is a high level of demand for large-floorplate modern offices in Hounslow's stronger locations. The table below shows the availability of office floorspace for units which exceed 500 sq m.

Table 4.3 Years supply of office floorspace (units over 500 sq m)[11]

	Available floorspace (sq m)	Years supply
Available secondary	46,020	1.4
Available new-build	27,576	0.8
Total available	**73,596**	**2.2**

Source: EGi/PBA (2015)

4.36 There is around 2.2 year's supply of offices, if the total available floorspace is taken into account. However, we must consider the qualitative mix of demand in Hounslow. Potential occupiers mainly look for modern, grade A offices. When the available stock is separated out into new-build and secondary, the picture becomes clearer. For new build property the years supply is as low as 0.8, indicating a shortage in this market sector. Furthermore, 26,980 sq m of this space is available within a single building – the recently completed Building 7 at Chiswick Park. Agents report that floorspace here is likely to be taken quickly. If Building 7 were to be taken completely, the remaining new-build stock, 596 sq m, would represent 0.02 years supply.

4.37 There is currently 70,027 sq m of office floorspace in the pipeline[12]. Construction has begun on 57,000 sq m of this space. However, 52,000 sq m is development at Sky's Osterley Campus. Taking this out of the equation as it is being built for owner occupation – only 18,000 sq m of new floorspace will be delivered to the market.[13]

[11] Years supply is a function of available floorspace and average take-up. Available floorspace is divided by the average take-up to give an indication of how many years supply this represents. As a general rule - if the years supply is less than the length of time it will take to deliver new stock to the market, it is considered low. Conversely, a supply much larger than this time-scale will be considered high.

[12] Source: LDD data (2015).

[13] Property market analysis focusses on gross take-up. It does not take into account losses or net take-up. Net change is instead discussed in the next chapter.

Table 4.4 Prime office rents

Location	Prime rents (/sq m)
Chiswick Park*	£562
Bedfont Lakes*	£350
Great West Road*	£312
London West End	£1,319
City of London	£727
London Midtown	£727
Richmond	£468
Staines	£355
Ealing	£350
Uxbridge	£344
Heathrow - Stockley Park	£339
Kingston upon Thames	£269

Sources: Colliers office rents map – grade A rents (2015)/*EGi (2015)

4.38 Agents report that new-build development is viable, but only in the strongest locations. Rents at Chiswick Park (Table 4.4) mean that development would likely come forward in this location were there more land available. Rents at Bedfont Lakes are again likely to make development viable in this location. On the Great West Road, rents are not quite so strong, as shown in Table 4.5. This table indicates an average rent of £235 /sq m. Agents report that recent deals have achieved more, however. High-quality, refurbished office space has achieved £312 /sq m. New-build space would likely be viable in this location, but it is recognised that this area is currently allocated as a Strategic Industrial Location (SIL).

Table 4.5 Office rents – Great West Road

Address	Quality	Size (sq m)	Rent (per annum)	Rent (/sq m)
3rd Floor, Vantage West, Great West Road, Brentford, Middlesex, TW8 9AX	Recent refurbishment	1,464	£437,297	£299
1st & 4th, 950 Great West Road, Brentford, Middlesex, TW8 9ES	Secondary	1,189	£243,174	£205
6th Floor, Vantage West, Great West Road, Brentford, Middlesex, TW8 9AX	Recent refurbishment	562	£157,275	£280
11th & 12th Floors, 1000 Great West Road, Brentford, Middlesex, TW8 9DW	Refurbishment	692	£131,250	£188
Brentside Exec Park - Bdlg 2, Great West Road, Brentford, Middlesex, TW8 9DS	Secondary	1,720	£351,766	£205

Source: EGi(2015)

Sites surplus to requirements

4.39 Although there is a reasonable level of available secondary stock for larger offices, it is unlikely that poorer quality stock will be taken. Without significant refurbishment, it is not the sort of property for which there is demand. And given current rents refurbishment is only viable in the most popular locations. It may be the case that some of this stock could be viewed as surplus and given up for other uses. However, on the Great West Road the existing office sites could provide the opportunity for redevelopment.

4.40 This secondary office stock, much of it in and on the edge of town centres, will be seriously depleted due to the high number of outstanding planning permissions and prior approvals (refer to Table 5.8 and Map 5.2 in the next section). This level of loss of stock is likely to absorb the over-supply, and bring supply back into balance with demand. The Article 4 Direction is expected to come into force in November 2016 and will allow the Council to manage the supply of secondary stock in the employment areas through the application of the market testing policy criteria.

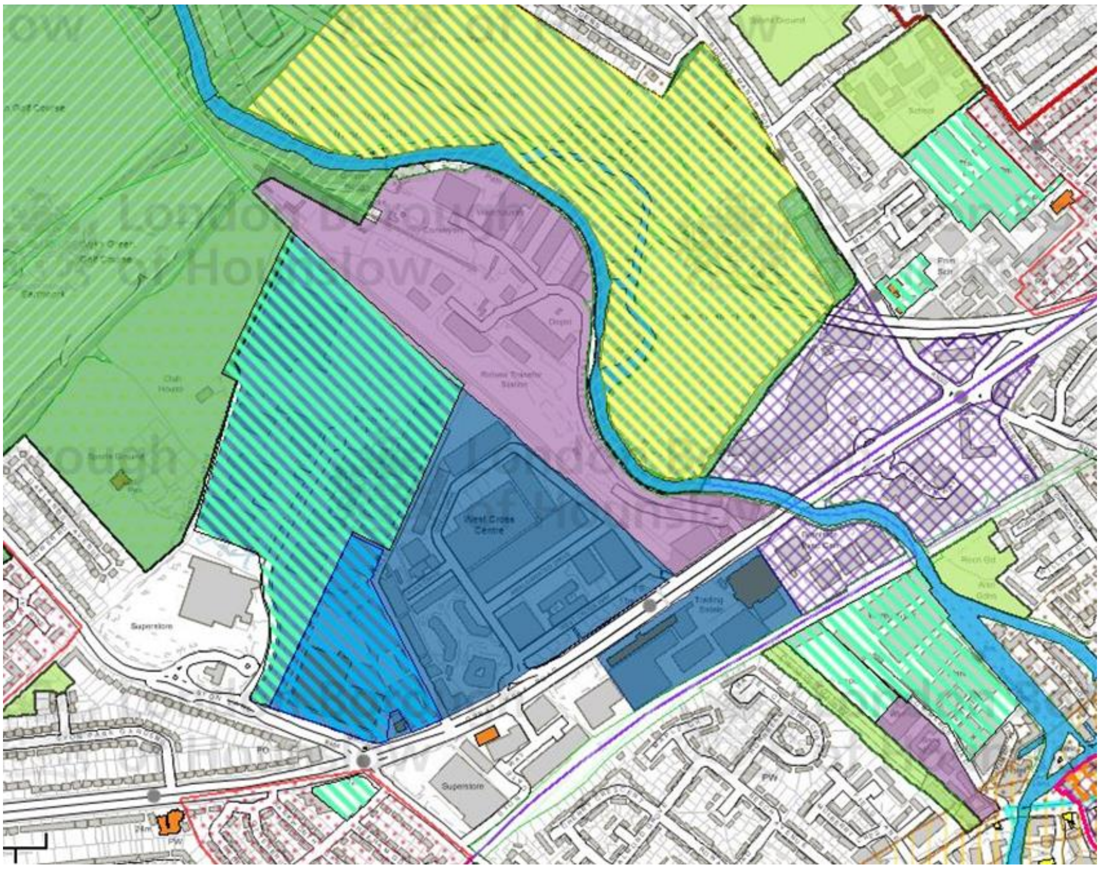
Opportunities for development

4.41 The previous sections have shown that development of modern, campus-style office parks is strongly viable, given the right location. This type of development therefore presents an opportunity. Were land available, development of this type could potentially be replicated and would be likely to be brought forward. The market for this type of space is strongest in Chiswick and around Bedfont Lakes. If land could be allocated for such development in these locations, it is likely that it would perform well. Delivery of campus-style development does however require large sites, and it is unclear that such an opportunity is available in Chiswick.

There are not any sites of a scale which would allow such a development currently available.

4.42 The Great West Road also presents an opportunity. It benefits from an existing office market and a number of higher-quality secondary properties. However, as is widely recognised, the area has poor connectivity. Were infrastructure, access and amenities to be improved, it is likely that this would provide a catalyst for the refurbishment of higher-quality secondary stock in the Great West Road Key Existing Office Location (shown in checks on the map below) . The Strategic Industrial Location, north and south of the Great West Road (shown in the darker blue on the map) could be suitable for high-quality, new-build office. But, the designation currently would exclude new office development.

Figure 4.2 Great West Road SIL location



Source: LB Hounslow policies map, published November 2015

Small and medium occupiers

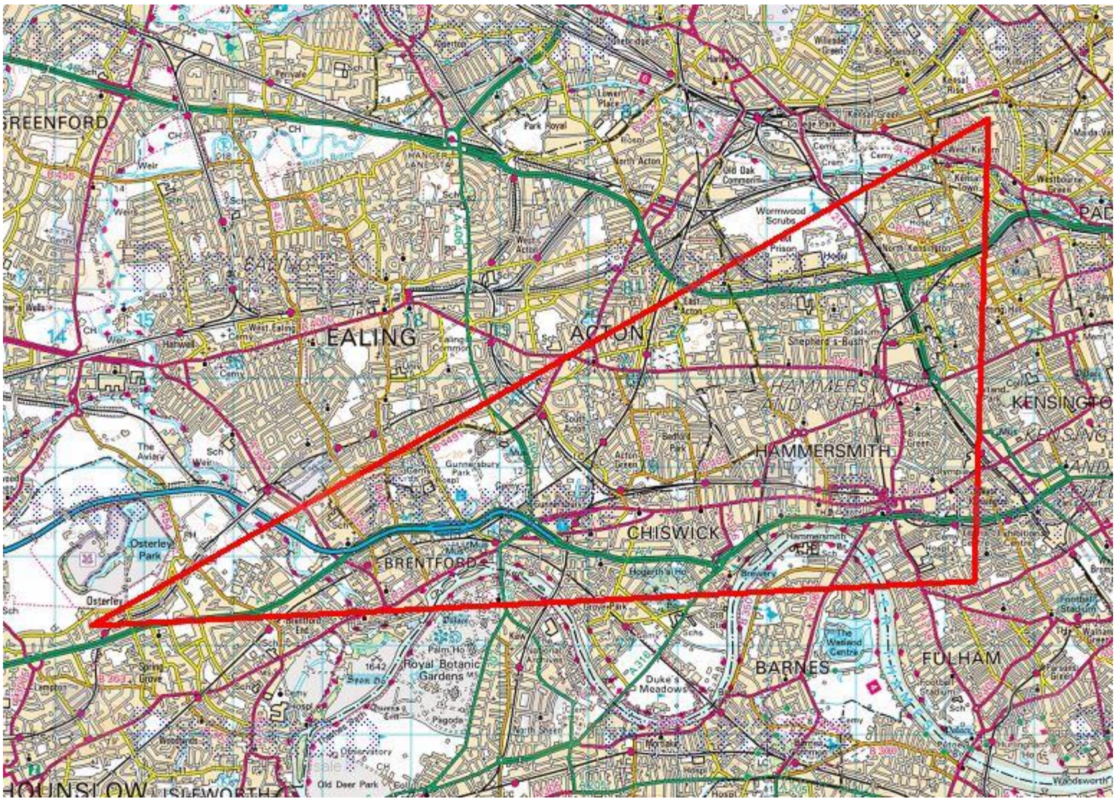
Demand

4.43 This market covers a wide spectrum of occupiers, from sole traders and micro-businesses to medium sized businesses employing hundreds of people. This section only considers these sectors in the context of their generating demand for commercial property. Many of Hounslow's microbusinesses work from home[14], and so are beyond the scope of this study.

4.44 Demand in Hounslow is strongest from small, owner-managed businesses and start-ups. These businesses represent a variety of sectors and, although there are businesses spread throughout the borough, demand is mainly concentrated in the 'TV Triangle'. This is attributed to the dominance of the ICT & Digital media sector, and the Media & Broadcasting sector in Hounslow. Although there is some demand in Hounslow's town centres from smaller service-oriented businesses such as law firms, this demand is weaker and tends to be inconsistent.

4.45 The 'TV Triangle', shown in the map below, is focussed mainly on Chiswick, but also extends along the Great West Road. It also covers locations beyond the Hounslow Borough boundary. This area features a high concentration of technology and media start-up businesses, which are keen to take space here to be part of a cluster of likeminded businesses. Tech and media activity does take place elsewhere in the Borough, but the focus is within the 'TV Triangle'.

Figure 4.3 The 'TV Triangle'



Source: www.tvtriangle.org.uk

4.46 Depending on the nature of the business, occupiers look for either serviced office space or flexible workspaces. These businesses tend to look for smaller spaces due to the high concentration of microbusinesses, but there is demand for anything up to around 500 sq m. Table 4.6 shows the take-up of spaces under 500 sq m for the past five years. This shows that demand has been slightly

[14] Regeneris (2015) *London Borough of Hounslow Sectors Research*

inconsistent. Analysis of this data generates an average take-up of 6,356 sq m per year.

Table 4.6 Annual office take-up (units under 500 sq m)

Year	Total take-up (sq m)
2010	5,920
2011	6,848
2012	8,725
2013	3,642
2014	6,643
2015 (Until October)	4,787
Total	**31,778**
Average take-up (2010-2014)	**6,356**

Source: EGi/PBA (2015)

4.47 Occupiers want space that is affordable, yet modern and business focussed. Whereas traditional thinking would view existing smaller units and secondary stock as well suited to smaller types of business, in Hounslow this is not the case. Agents report that occupiers do not view units above high street shops as appropriate, for example. Instead, the creative nature of many of the borough's smaller businesses means that there is demand for 'industrial-feeling', edgy spaces. They are not necessarily looking for high-quality units which would be expensive to provide. Instead, these businesses are looking for the sorts of industrial refurbishments providing stripped-back, exposed interiors.

4.48 Although there is demand for 'edgy' office space, few properties of this type have been delivered in Chiswick and Brentford. And those that have are not fully let. Agents report that this is because rents tend to be fairly high. This means that many new and smaller businesses cannot afford the space. This, in turn, creates a lack of confidence in the market and limits the amount of new development. Rather than risking investment in buildings which may sit empty, developers will instead provide property which offers more certainty. In this way, the nature of what occupiers want, and what the market is willing to provide, fail to align.

4.49 Regeneris' LBH Sectors Research[15] suggests that many of Hounslow's smaller businesses, involved in both the ICT & Digital media sector and the Media & Broadcasting sector, have been attracted to the area due to larger broadcasting businesses such as Sky. Although unable to map Sky's supply chain, consultations conducted as part of this study indicated that Sky's choosing this

[15] Regeneris (2015) *London Borough of Hounslow Sectors Research*

location had acted as a draw for many occupiers. Although these businesses are mainly microbusinesses and tend to work from home, some smaller examples do take commercial space. Larger examples also generate demand for offices. As micro-businesses grow, it is also likely that they will move out of home-offices and into commercial space.

4.50 As noted in paragraph 4.47, these businesses want ‘edgier’, industrial-style spaces. They want to be in the TV Triangle to be close to businesses such as Sky, but if they cannot afford space, these occupiers may be likely to look elsewhere. In the past, occupants have instead taken space in locations such as Shoreditch and Hackney. In these locations, edgy space was provided where it did not compete with corporate offices and rents were cheaper.

4.51 Elsewhere in the Borough, rents are lower – especially in town centres. Although smaller businesses do take offices beyond the TV Triangle, there is less demand for space and the nature of businesses is different. In these locations, office take-up tends to be service related, with occupiers such as solicitors taking space.

4.52 These more traditional town centre offices are also where the majority of businesses that serve and provide employment opportunities for the Black and Minority Ethnic (BAME) communities are located. These businesses are likely to have less flexibility about where they locate because they have to be within the communities that they serve. Ensuring that there is sufficient availability of office space to meet the BAME need is an important factor to consider in future monitoring of town centre office availability.

4.53 There are very few offices in Feltham town centre, but there is also little demand as this is a mainly industrial focussed town. Brentford’s town centre experiences very little demand, but there is not a great deal of office space here. Hounslow also faces limited demand, and although there is office stock here, it is mainly comprised of poorer quality, secondary offices.

4.54 The nature of existing town-centre office stock is not the only reason demand is weak. There is a problem with how these areas are perceived. It is reported that the town centres in Brentford and Hounslow specifically, are regarded by many potential occupiers as being in need of rejuvenation - they are considered by potential occupiers to be unattractive and poor strategic locations. This is consistent with the findings of the London Office Policy Review[16], which found that generally, town-centre office locations in Outer London areas are in decline.

4.55 The loss of offices at the Trinity Square development indicates that perception is perhaps the more serious issue for Hounslow’s town centres. This site was formerly the headquarters for American Airlines. In this case the developer invested in refurbishment with the intention of providing high-quality offices. This development was then made available for rent, but experienced little demand. Given a stronger location, it is likely that these offices would have let quickly. However, this property was not taken and has now mainly been converted for

[16] GLA (2012) *London Office Policy Review*

residential use. The agent for this development confirmed that the property failed to let because Hounslow town centre is not considered a strong business location.

Supply and market balance

4.56 Table 4.7 shows the available office floorspace and number of years supply. The figures show that there is very little new-build space available for smaller occupiers. With 0.1 years supply available, potential occupiers have very little choice in terms of new property.

Table 4.7 Years supply of office floorspace (units under 500 sq m)[17]

	Available floorspace (sq m)	Years supply
Available secondary	11,451	1.8
Available new-build	800	0.1
Total available	**12,251**	**1.9**

Source: EGi/PBA (2015)

4.57 Current levels of secondary stock would be considered acceptable, were this type of property in demand. However, available offices are more traditional secondary spaces, often in town-centre locations. As highlighted in paragraph 4.51, demand is very limited in these areas. Additionally, agents and developers report that low rents make the refurbishment of these spaces unviable.

4.58 Agents report that due to levels of demand in town-centre areas, a significant proportion of office stock is being lost through permitted development rights - offices are being converted for residential use simply because of a lack of demand. In their view, offices would sit empty were the space not utilised for other purposes. It might be argued that higher returns for residential space may also encourage this change of use. However, although rents are low, very little space is being taken. It does seem that demand for town-centre offices is poor.

4.59 There are a limited number of locations offering the type of modern, ‘edgy spaces’ for which there is demand. However, where this type of space has been provided, there is still availability. Workspace operates a number of refurbished spaces in Chiswick and Brentford. These sites offer flexible spaces, offices, studios and co-working environments. Table 4.8 lists a number of currently available space and the asking rents for each.

[17] Footnote 11 above explains definition of years supply.

Table 4.8 Rents for Workspace units in Hounslow

Location	Type of Accommodation	Size (sq m)	Asking rent (/sq m)
Barley Mow Centre, Chiswick	Office	46	£741
Barley Mow Centre, Chiswick	Office	160	£483
The Light Box, Chiswick	Studio	37	£404
The Light Box, Chiswick	Office	33	£402

Source: Workspace (2016)

4.60 Agents report that rents of this level should make development economically viable, but many new and small businesses cannot afford them. Although they want this type of space, they need it at more affordable prices. This is why, even with a limited amount of properties of this type and significant levels of demand, there is still vacancy.

4.61 As noted in paragraph 4.48, developers are unlikely to bring forward this type of ‘edgy’ development in such a situation. If the small number of existing premises are not fully let, and occupiers cannot afford the rents which would make development viable, then they will not bring forward new stock. Given market conditions, it is unlikely that more of this space will be brought forward.

4.62 Rents in Hounslow and Brentford town centres are considerably lower. There has been no recent development, so rents relate only to secondary stock. In Hounslow, offices achieve an average rent of £163 /sq m whilst in Brentford space achieves around £150 /sq m. Agents state that rents of this level mean that refurbishment is not viable. Table 4.9 shows how these rents compare to secondary spaces in other locations.

Table 4.9 Secondary office rents

	Rent (/sq m)
Hounslow*	£163
Brentford*	£150
London West End	£861
City of London	£511
London Midtown	£511
Richmond	£404
Heathrow - Stockley Park	£291
Staines	£237
Uxbridge	£226
Ealing	£215
Kingston upon Thames	£172

Sources: Colliers office rents map – secondary rents (2015)/*EGi

4.63 There is very little supply of smaller offices in the pipeline. Around 1,500 sq m of space is likely to come forward, although construction has only begun on 88 sq m as things stand[18].

Sites surplus to requirements

4.64 There is currently an oversupply of secondary stock in town-centre locations. Vacancy levels are high, whilst rents are low.

4.65 Due to low levels of demand and weak rents in Hounslow's town-centres, some of the poorest examples of existing stock in these locations perhaps represent a surplus. If, in the case of Trinity Square, even higher quality spaces are unlikely to let, this space should possibly be released for other uses.

4.66 If stock is given up for redevelopment in these locations, it is possible that vacancy levels will require monitoring. Little new stock is likely to be provided in these locations. In order to ensure that the limited demand in these areas can be met, it may be necessary to ensure that supply does not fall below demand.

Opportunities for development

4.67 Local occupiers tend to aspire to modern, flexible and creative spaces in the TV Triangle. But given current rents this space is often beyond their means, so that potential occupiers are often priced out of the market.

[18] LDD Data (2015)

4.68 There is the opportunity to provide more of this space, if it can be done in a way which ensures affordability for occupiers. However, lowering the rents also reduces the viability of development. It is unlikely that the market alone will provide such space. Demand for this type of space is also focussed in the same area where there is demand for corporate space. With competition from higher value development, it is perhaps unlikely that ‘edgier’ space will be delivered at lower rents and still be viable. If Hounslow intends to keep the smaller occupiers who want space in the TV Triangle area because of the strength of the broadcasting industry, it is likely that this will require public sector support. Although growth is expected in this sector, it is likely to require backing if this demand is to be captured.

4.69 The regeneration of Hounslow’s town centres could potentially help to unlock opportunities for future office development. The quality of the local environment and amenity, the availability of facilities such as shops, restaurants and leisure are increasingly important for staff satisfaction/retention and thus are critical factors in attracting office developers. At present there is little prospect that redevelopment schemes in Hounslow’s town centres (with the exception of Chiswick) could be office led, as evidenced by the recently permitted High Street Quarter scheme in Hounslow town centre, which does not include any office space. However, if the regeneration initiatives greatly improve the environment and the available facilities, then offices could possibly be part of the mix in future redevelopments.

Conclusion

4.70 We have seen that the office market in Hounslow is defined by two occupier profiles. There is a strong market for larger offices from corporate businesses. There is also demand for space from smaller local businesses.

4.71 The market for larger spaces is focussed on campus-style development. Chiswick Park and Bedfont Lakes are particularly strong examples. The popularity of this style of development highlights the opportunity to provide more of this type of space. Were land set aside in Chiswick, or to the west of the borough near Heathrow, it is likely that new campus-style office development could be achieved.

4.72 There is also a secondary market for larger corporate offices on the Great West Road. These offices have been popular in the past, and recent refurbishments have shown promising increases in rents. In this location, there is the potential to deliver new corporate office space. However, for this to happen, access, the provision of amenities and servicing would need to be improved. Additionally, the SIL allocation here excludes new office development. But, were the transport, services and infrastructure issues to be addressed, it is likely that the potential of the Great West Road could be unlocked, and substantial office provision would be possible in a campus style format. But this would require a revision to the area’s existing designation and the reprovision of the existing industrial space.

4.73 The market for smaller-scale development is characterised by the concentration of smaller, creative businesses within the ‘TV Triangle’. Although these businesses want modern, funky and affordable space in Chiswick, there is limited availability of existing stock. The high asking rents for examples of this type of space would make development viable and could present an opportunity for future development. However, many businesses cannot afford these prices. This is why there is available floorspace, even when there are very few existing examples of development of this kind. It is unclear whether this type of unit could be delivered viably, whilst offering prices that would allow smaller businesses and start-ups can afford it.

4.74 Elsewhere in the borough, rents are so low that new development is unlikely to occur. Demand is particularly poor in town centres, where a significant amount of stock has already been lost to permitted development. Rental levels and demand are such that even refurbishment of existing stock is unlikely to occur. A major issue for town-centre locations is their poor image. For these areas to become more successful as office locations, it is likely that they would require significant rejuvenation. Were the image of the town centres to be improved overall, there might be the opportunity to attract some future office use, but only as a relatively minor part of a mixed use scheme. Without significant regeneration, it is likely that remaining stock will continue to be lost to permitted development rights. We discuss the future of Hounslow’s town centres in a later chapter.

Industrial

Overview

4.75 Hounslow benefits from a very buoyant industrial market. To the west it boasts a particularly strong logistics market. Nationally, logistics markets have shown growth in recent years due to the strength of online retail. With goods increasingly purchased online, there is a need for logistics space, both for storing goods, and from which they can be distributed. Although this has had a positive influence on the market in Hounslow, with space mainly taken for local distribution, the reason logistics is so successful here is because of airport-related activity.

4.76 Heathrow Airport benefits the logistics market by attracting international occupiers involved in cargo storage and freight-forwarding. Occupiers frequently take space because it offers strong access to Heathrow Cargo Terminal. In this area, there is also demand from occupiers involved in roles supporting airport activity. Space is taken by businesses who prepare food for in-flight catering, for example. Both types of occupier generate demand for larger industrial warehousing close to the airport.

4.77 Elsewhere in the borough, there is also a strong market for smaller industrial spaces. This market is dominated by local businesses. Spread throughout the borough, these are often service-related businesses such as MOT centres. Although these uses are not often glamourous and in some cases may be considered ‘bad neighbours’, the market for smaller industrial property is strong, and the services offered are of value to local communities.

4.78 Even with a strong industrial market, there are factors restricting growth. The focus on distribution in the west of the borough means that new development consists of larger units. These, in turn, require larger sites. Although there is a great deal of demand for such sites, agents and developers report that there is a shortage of available land. This means that land values and rents are driven high in locations closest to the airport. This has the effect of forcing logistics businesses to take more compact units than they would otherwise, or to look elsewhere.

4.79 Industrial property to the west of the borough is characterised by high-quality, modern, yet compact distribution units. Elsewhere, in locations such as Brentford and Hounslow, industrial units tend to be smaller in scale and are often secondary in nature. There is limited availability of modern, smaller units.

4.80 Demand for industrial property in Hounslow is currently strong. Take-up over the last five years has averaged just under 48,000 sq m, as shown in the table below.

Table 4.10 Annual industrial take-up

Year	Total take-up (sq m)
2010	42,537
2011	19,776
2012	34,891
2013	46,638
2014	95,094
2015 (Until October)	26,384
Total	**265,320**
Average take-up (2010-2014)	**47,787**

Source: EGi/PBA (2015)

4.81 The Industrial market in Hounslow is defined by two occupier profiles. As noted earlier, the west of the borough is dominated by a strong logistics market. Elsewhere, there is a healthy market for smaller property, driven by local businesses. These range from MOT garages to technical companies engaged in Research and Development (R&D). The following sections consider these two occupier profiles in more detail.

High-value logistics

Demand

4.82 Logistics activity in Hounslow features large national and international companies involved in the movement of freight and cargo. Businesses such as American Airlines Cargo and Cargolink Express have space within Hounslow, and in October 2016 ASC cargo took just under 4,300 sq m of space at Radius Park in Feltham.

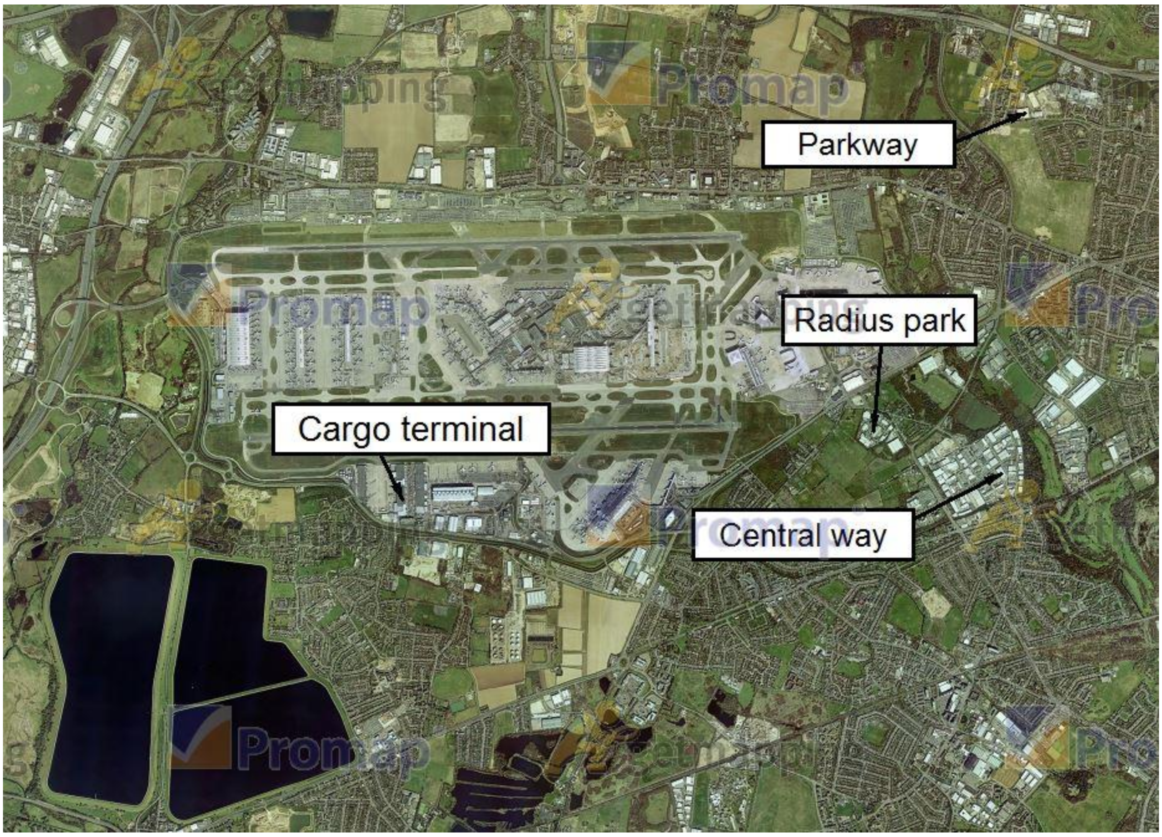
4.83 Logistics businesses tend to choose Hounslow because it allows them to be close to the airport. Some choose locations to the south of the airport as it gives them access to the cargo terminal. Others prefer locations to north and east of the airport as this offers stronger access to the road network. These markets tend to perform equally well, although locations to the south are currently slightly ahead in terms of the rents achieved (Table 4.13).

4.84 Businesses which service the airport and airport-related activity also take warehousing space in Hounslow. These businesses are often involved in catering, such as LSG Sky Chefs who occupy a warehouse in Feltham's Central Way Trading Estate.

4.85 There is further demand for logistics warehousing from distribution companies. This type of demand is independent from airport-related activity. It features online retailers and 3rd party logistics companies . These businesses are unlikely to take space in order to distribute goods to the wider London area – the rents in Hounslow are higher than other strategic locations around the capital. Instead they will take space allowing them to distribute goods locally, throughout the Hounslow area.

4.86 The market is currently strongest in the Feltham area. Locations such as Radius Park and Central Way benefit from close proximity to the Cargo Terminal. Radius Park is home to occupiers such as Air Canada. Central Way is occupied by Federal Express and UPS.

Figure 4.4 Heathrow-related logistics locations



4.87 Locations west of Hounslow town also benefit from airport and distribution-related activity. Here, Parkway Trading Estate features an ASDA home delivery centre of just over 10,000 sq m. This location offers strong access to the road network, as well as good links to the airport.

4.88 Logistics occupiers are looking for modern, high-quality industrial warehousing. More specifically, these types of business commonly require:

- Modern warehousing.
- Sizes ranging from 1,000 sq m to 9,000 sq m, although some want larger.
- High eave heights (10-12 m).
- Loading doors.
- Access to major roads.
- Room for parking and turning HGVs.
- Secure yards.

4.89 A developer active in the Hounslow market confirmed that in terms of size, there is a ‘sweet spot’ in the Hounslow market. Demand is strongest for units between 7,000 and 9,000 sq m. The size of units taken by logistics occupiers in Hounslow is slightly uncommon – these businesses are more regularly associated with very large sheds. High rents and lack of available land mean that occupiers are forced to take smaller spaces here.

4.90 The table below shows take-up for units over 1,000 sq in the past 5 years. Unfortunately, the available market data for industrial uses does not provide consistent information regarding the types of occupier. This means that the data cannot be analysed by occupier type. Instead, to get an idea of the levels of logistics take-up, we look at the size of property most commonly taken by logistics occupiers. In Hounslow we look at the take-up for units over 1,000 sq m.

Table 4.11 Annual industrial take-up (units over 1,000 sq m)

Year	Total take-up (sq m)
2010	33,463
2011	7,921
2012	3,064
2013	8,473
2014	76,294
2015 (Until October)	10,523
Total	**139,738**
Average take-up (2010-2014)	**25,843**

Source: EGi/PBA (2015)

4.91 Although agents report that the market for logistics space is currently strong, take-up has been inconsistent over recent years. This is mainly due to the large size of logistics units. When larger sheds have been delivered, take-up has peaked. When development has slowed or when land has been scarce, take-up has fallen dramatically.

4.92 Speculative development of industrial warehousing effectively halted following the recession. But, as the economy has improved, building has again begun in the strongest locations. A supply of new development and growing occupier demand brought about a record year in 2014 for take-up nationwide.[19] This is also reflected in the Hounslow market. Take-up spiked in 2014, as new stock had been brought forward and demand was strong. Additionally, the units taken were at the larger end of the scale. The take-up of eight units alone amounted to circa 50,000 sq m of floorspace and 40% of all take-up this year was for spaces over 2,500 sq m.

4.93 Agents report that take-up has slowed in 2015, not because there is a shortage of demand, but because of a lack of supply.

4.94 Although developers are looking to provide this type of space, agents report that there is little available land where new space could be provided. The scarcity of land available for industrial development around Heathrow is illustrated by the X2 development. Here, in order to make use of high-value land in short supply, a multi-story distribution unit was constructed.

4.95 Additionally, logistics units require large sites. And trends indicate that occupiers want increasing amounts of yard space for parking and turning large vehicles. This means that land requirement is growing whilst the density of land use is decreasing – the floorspace of property is not increasing, only the yard around it. Since rents are based on the floorspace of built units and not the land area of sites, the return on developers' investment is decreasing. This is not unique to Hounslow, but a general feature of the wider market.

4.96 If industrial land is not provided in Hounslow, occupiers and developers will look elsewhere. The market for Heathrow-related logistics space is not unique to Hounslow. It must compete with other boroughs such as Hillingdon which also has space around the airport. Occupiers and developers do not distinguish between the two in terms of locational preference.

4.97 The lack of land, and footloose nature of occupier demand, is illustrated by the case of DHL. The international distribution company has been in Hounslow since 1999, but has recently decided to leave the borough. A suitable site could not be found for their new headquarters and logistics hub, and so the distribution company is to take just under 14,000 sq m on a redeveloped site in Poyle, Slough.

Supply and market balance

4.98 The table below shows the current availability of floorspace, for warehousing units over 1,000 sq m. The years supply calculation suggests that there is a significant

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[19] Savills (2015) *Big Shed Briefing: January 2015*

supply of stock overall, with the total availability amounting to just under 4 years supply. But, current demand tends to be for modern stock. When this is looked at in isolation, there is 1.6 years supply.

Table 4.12 Years supply of Industrial floorspace (units over 1,000 sq m)[20]

	Available floorspace (sq m)	Years supply
Available secondary	58,574	2.3
Available new-build	41,018	1.6
Total available	**99,592**	**3.9**

Source: EGi/PBA (2015)

4.99 In this case, it is unlikely that the years supply quoted in this table will be an accurate projection for the future. This is because the market is currently strong – performing in a way which is inconsistent with the trends of recent years. Although the average take-up gives a good starting point for analysis of the market balance, it should be viewed cautiously. If the market is performing above the average trend, as agents suggest is currently the case, then going forward it is unlikely that the existing stock represents as much as 1.6 years supply.

4.100 There is 41,941 sq m of logistics development[21] coming forward in Hounslow. Construction has begun on 25,000 sq m of new space. 21,000 sq m of this floorspace will be delivered at Heathrow Logistics Park.

4.101 Heathrow Logistics Park offers compact logistics warehouses, ranging in size from 3,000 sq m, to 10,000 sq m. These are due for completion in September 2016. Speculative development of this type highlights the level of confidence in the market.

Table 4.13 Prime industrial rents

Location	Prime Rent (/sq m)
Radius Park, Feltham*	£150
Central Way, Feltham*	£145 (asking)
Parkway Trading Estate, Heston*	£120
Poyle	£151
Park Royal	£148
Wembley	£140
Hayes	£129
Acton	£129
West Drayton	£118
Greenford	£118
Uxbridge	£118

Sources: Colliers industrial rents map – grade A rents (2016)/*EGi 2016

[20] Footnote 11 above explains definition of years supply.

[21] LDD Data (2015)

4.102 Agents state that rents in Feltham (Table 4.13) mean that new logistics space is viable, were there land available for development. In locations such as Parkway Trading Estate, rents are again likely to make new development viable should land be allocated for this type of use. Table 4.13 gives an indication of how these rents compare to locations in the surrounding area.

Sites surplus to requirements

4.103 Demand is currently for high-quality, modern logistics warehousing as described in paragraph 4.88. This suggests that existing secondary stock may be surplus. However, with lack of land for new development, poorer quality secondary stock is already being renewed. Additionally, although secondary, much of the available stock is of high quality. For as long as planning policy protects these sites for industrial use, it is likely that they will continue to be well occupied or when required, redeveloped to provide new stock.

Opportunities for development

4.104 Agents confirm that if new development is delivered, it is very likely to be taken quickly. With strong demand and high rents, development of this type is viable in the west of the borough, in locations around Bedfont, Feltham, Cranford and Heston. However, with limited availability of land, the ability of developers to provide new development is limited. If Hounslow is to capture more of this type of employment, it is likely that more land will need to be set aside in locations to the west of the borough.

Local occupiers

Demand

4.105 The market for smaller-scale industrial units is dominated by local service-related businesses. These occupiers represent a variety of sectors, and require space throughout the borough. They may be small workshops or car garages, for example. There is also demand for space from more technical, R&D related businesses, and also trade counter businesses such as Screwfix.

4.106 Because these businesses serve local communities, premises are required close to them. These businesses are likely to take secondary space before considering moving to other locations. Therefore, there is no particular hotspot for this type of demand. It is instead spread amongst the borough’s main town centre; in particular Hounslow, Brentford and Feltham. This also means that the market is relatively self-contained - Hounslow does not compete as much with other areas to keep these occupiers.

4.107 The one location where the market for this type of space is not particularly strong is in the area around Chiswick. There is very little undeveloped space where new industrial property could be provided at this end of the Borough. Also, because of the high value of office and residential use here, industrial uses frequently cannot compete with higher land values. This issue is mainly confined to Chiswick, but the higher values involved in these uses does put pressure on industrial space elsewhere.

4.108 These businesses tend to occupy standard smaller industrial warehousing. They will look for units of anything up to 1,000 sq m, although a limited number will take larger spaces. They favour sheds which can be adapted to suit their needs, although some will look for units offering ancillary office space. These businesses also favour units offering plenty of yard space. This space is often used for the storage of materials or vehicles, for example.

4.109 Demand from this type of occupier is strong. Table 4.14 shows that the average annual take-up for units under 1,000 sq m is circa 22,000 sq m.

Table 4.14 Annual Industrial take-up (units under 1,000 sq m)

Year	Total take-up (sq m)
2010	9,074
2011	11,855
2012	31,827
2013	38,165
2014	18,801
2015 (Until October)	15,861
Total	**125,583**
Average take-up (2010-2014)	**21,944**

Source: EGi, PBA (2015)

4.110 Consultation with agents and local businesses has shown that although there is some availability of industrial space of this size, there is a shortage of stock offering larger yard spaces. This is problematic for smaller businesses which require the parking of larger vehicles. It is also reported that it can be difficult to find space for of industrial businesses which may be considered 'bad neighbours'.

4.111 Although demand for smaller industrial properties is strong, there is limited availability of modern spaces. Very little new development is being delivered. Because of the self-contained nature of the market, the availability of secondary units is dwindling.

Supply and market balance

4.112 Table 4.15 lists the available floorspace for units under 1,000 sq m. When compared against the average annual take-up (Table 4.14), this table indicates that there is limited supply of industrial stock for local occupiers. This table also confirms agents' reports that there is a distinct lack of modern units of this scale.

Table 4.15 Years supply of local industrial space (units under 1,000 sq m)[22]

	Available floorspace (sq m)	Years supply
Available secondary	24,827	1.1
Available new-build	4,397	0.2
Total available	**29,224**	**1.3**

Source: EGi/PBA (2015)

4.113 In addition to a lack of modern units, there is a limited amount of secondary floorspace available. The available 1.3 years supply of secondary stock is low, and perhaps worrying, when very little new space is being delivered. This indicates that current supply will very quickly run out.

4.114 Rents for units in this submarket are strong. Feltham outperforms Hounslow and Brentford slightly, owing to its location close to the Airport. As these units tend to be mainly secondary in nature, Table 4.16 compares the rents achieved in these towns with other locations in the surrounding area. Agents report that these rents make new development viable in most locations. However, developers are unwilling to provide units of this type. They consider smaller occupiers to offer weaker covenants and are unwilling to engage in speculative development because of the greater risk.

Table 4.16 Industrial rents

Location	Prime Rent (/sq m)
Hounslow*	£122
Brentford*	£129
Feltham*	£134
Park Royal	£108
Poyle	£108
Wembley	£97
West Drayton	£91
Acton	£91
Uxbridge	£86
Hayes	£81
Greenford	£81

Sources: Colliers industrial rents map – secondary rents (2016)/*EGi

4.115 In terms of development viability, agents report that in Brentford, rents on the Great West Road are not significant enough to make new industrial development viable on existing office sites. Although allocated for industrial use, the rents achieved by the existing secondary offices mean that developers are unlikely to bring forward industrial use. Rents for existing office units average around £235 /sq m. Agents report that new industrial development in this location would

[22] Footnote 11 above explains definition of years supply.

achieve a maximum of £145 /sq m. It does not make sense to redevelop these sites in order to achieve a poorer return.

4.116 The development pipeline for smaller units highlights the reluctance to bring forward space of this type. Only 6,868 sq m of new floorspace is planned, and work has only begun on 929 sq m[23].

4.117 Developers are hesitant to provide units of this size because there is often less certainty with smaller occupiers. Whereas larger industrial businesses such as Amazon or DHL are viewed as strong covenants and will often pre-let development, smaller occupiers are viewed as more of a risk. Build costs are also higher for smaller units. Additionally, lack of new development means that the gap between secondary and grade A rents has narrowed. With limited land on which to build, developers are unlikely to redevelop sites when they are unlikely to achieve significantly higher rents.

Sites surplus to requirements

4.118 With limited availability and a restricted pipeline supply of new development, existing stock is important for meeting the demand of local occupiers. There is significant demand for this type of space, and rents make it economically viable, but limited new stock is being delivered. If it is allowed to be redeveloped for other uses, it is unlikely that this space will be replaced elsewhere.

Opportunities for development

4.119 Rents and the levels of demand for units under 1,000 sq m mean that this type of development is viable. This should present an opportunity for new development. However, with developers unwilling to bring forward new industrial units of this type, the market does not appear to view the delivery of such space as an opportunity.

Conclusion

4.120 It is clear that there is a strong market for industrial space in Hounslow. This market is defined by two different types of occupier. Firstly, high-value logistics dominates the market in the west of the borough, with large national and international occupiers taking high-quality modern logistics units. Secondly, there is demand from smaller local businesses who require space throughout Hounslow.

4.121 The market for high-value logistics space is mainly airport-related, although distribution also plays a part. As such, the market for this type of space is focussed around Heathrow Airport. There is availability of new-build space for this type of occupier, but agents indicate that this is likely to be taken quickly. With limited land available, developers are currently forced to redevelop existing sites in order to service new requirements.

4.122 Levels of demand for, and the rents generated by, logistics space makes this type of development viable. If land became available on which to provide this type of

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[23] LDD Data (2015)

property, it is likely that it would be brought forward by developers. It is also likely that new premises would be well occupied. This type of property presents a significant opportunity to provide employment space, but land must be made available around Bedfont, Feltham, Cranford and Heston.

4.123 The demand for smaller industrial units from local occupiers is also very strong in Hounslow. Although, demand is spread throughout the borough, it is strongest in locations around Feltham, Hounslow, and Brentford. Development is viable, but the market is not supplying property of this type. This type of stock should present an opportunity, but larger-scale logistics warehousing is perceived as offering more certainty and less risk. This means that developers are more likely to pursue this type of development.

4.124 With limited provision of new, smaller industrial stock, existing property should be safeguarded. With a strong Borough-wide industrial market, none of Hounslow’s existing sites represent a surplus.

Conclusion

4.125 This chapter has explored office and industrial markets in Hounslow. It has reviewed the demand for employment floorspace in the borough. It has looked at the nature of demand and levels of supply in order to gain an understanding of the balance of the market. By doing so, we have identified where there is a requirement for employment land and where existing floorspace represents a surplus.

4.126 The office market is found to be defined by two submarkets. There is a market for larger, modern offices from large corporate companies, and a market for smaller, modern spaces from local occupiers.

4.127 We conclude that there is a shortage of larger, modern grade A office space. High rents and strong demand for this type of space makes development viable – particularly campus-style development. The market for this type of space presents a significant opportunity, and developers are likely to bring this type of property to the market. In order for this type of development to come forward, large sites in strong locations must be identified. In particular, sites close to Chiswick and Bedfont Lakes present an opportunity. These are known to be strong office locations and offer market certainty.

4.128 With regard to space for small to mid-sized local businesses, things are more uncertain. There is a difference between what occupiers want and what the market is willing to provide. These businesses want modern, funky and flexible spaces and they want them to be located in the TV Triangle and around Chiswick. But, they want these spaces to be affordable. It is unclear whether this type of space can be delivered in such a competitive location without compromising viability. As such, developers are not providing a great deal of this type of property. Where they have, rents are beyond the reach of many small businesses and as such, are not fully let.

4.129 Although there are cheaper offices available in town-centres, there is very little demand for the type of space available there. Therefore, town-centre offices currently represent a surplus of floorspace. Efforts to rejuvenate these centres has the potential to raise some office demand. But without regeneration and an upgrading of town centre environments, office demand will remain very weak, and it is likely that the remaining town-centre office stock will continue to be lost to permitted development change of use to residential.

4.130 Chiswick is an exception to the above, as it has locational advantages that attract strong interest from office occupiers and the promoters of office development. But in regard to the other town centres we think there are no prospects of the office markets being turned around even through the planned regeneration initiatives.

4.131 The industrial market is also defined by two submarkets. There is demand for high-quality modern logistics units from cargo, freight and distribution occupiers. There is also a market for smaller industrial units from smaller local businesses.

4.132 Our analysis shows that although there is an available supply of logistics space, it is unlikely to sustain current levels of demand. With growth in the market, this space will likely be taken quickly. Developers are keen to provide new premises of this type, but report that there is a lack of available land. This presents a significant opportunity. If a greater amount of land were available in the Bedfont, Feltham, Cranford and Heston areas, it is likely that new logistics space would be provided.

4.133 The market for local industrial spaces is more problematic. Although this market experiences high rents and healthy demand, levels of supply are constricted. New development of this type is not being brought forward. Developers are less certain of the market for this type of property and are hesitant about providing units of this type. Although the market is strong, and should present a strong opportunity, the market alone is currently unlikely to improve supply levels. In this case it is important that existing uses are safeguarded to ensure that they are not lost.

4.134 Hounslow's existing employment markets show strength and have the potential for future growth. Benefitting from strong connections with Central London and Heathrow Airport, Hounslow has the potential to build on these assets to attract businesses interested in locating in this west London/Heathrow area. However, in order to attract what are often 'footloose' businesses, and to allow growth to happen, more land will be needed. If this fails to happen, the borough will not be able to accommodate the potential occupiers and will lose out to locations elsewhere in the economic market area.

5 DEMAND AND SUPPLY IN THE LONG TERM

Introduction

5.1 In this chapter, we provide a broad quantitative assessment of the demand and supply of employment land over the plan period 2011-31 and draw the implications for planning policy. On the demand side, the assessment is based on a view of future growth in the local economy – which will drive the demand for employment space. To estimate land and property supply we use data from the Valuation Office Agency and from the London Development Database (LDD) supplied by the Council, covering activity in years 2012-2015, and our analysis of the Plan allocations has been fed into this review. All floorspace data is measured in gross internal area (GIA). The detailed background data are at Appendix A (electronic file).

5.2 We look first at past and current provision, then to a 'business-as-usual' future demand and supply, and then finally a scenario based on the potential impact on jobs of a third runway at Heathrow.

Offices

Background

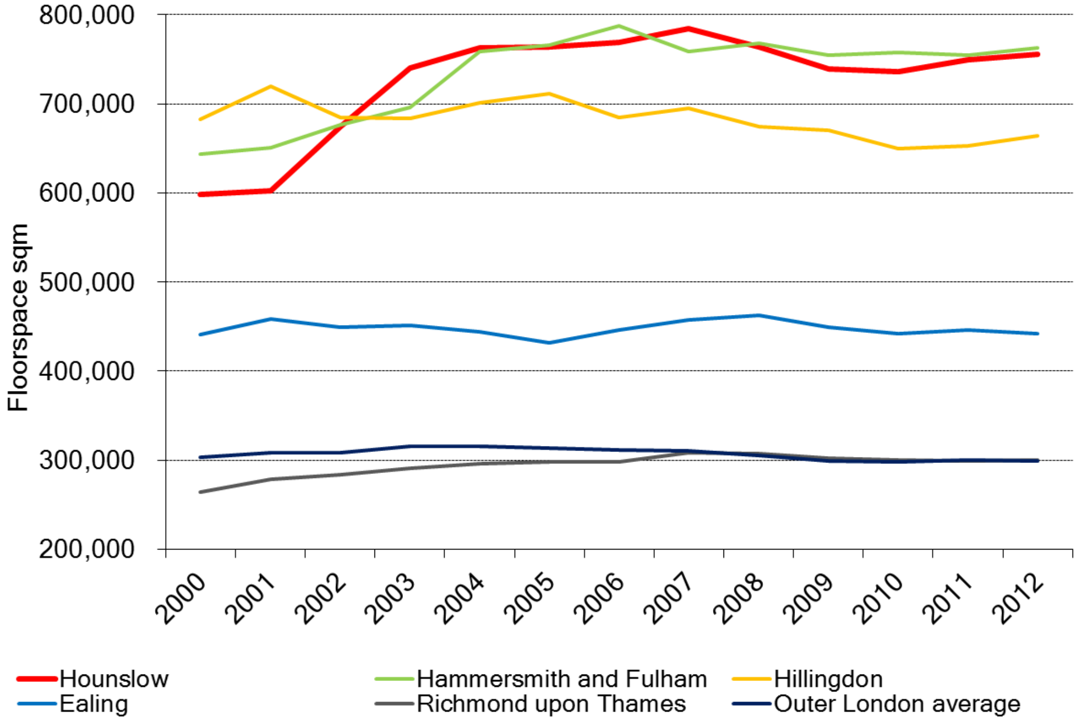
5.3 The Outer London boroughs have experienced a decline in office floorspace over a number of years, as office occupiers favoured Inner London locations or locations beyond London where rents are cheaper and car parking ratios are much less restrictive.

5.4 Since the millennium the decline has been far less pronounced, and indeed as illustrated in the chart below total office floorspace across the outer London boroughs has remained just about constant at around 300,000sq m.

5.5 While there have been some 'losers' such as Hillingdon, other boroughs have gained, and Hounslow is one such borough. Figure 5.1 below shows Hounslow's strong office floorspace gains between the start of the millennium and 2012 (an increase of 158,000sq m), with the campus style development at Bedfont Lakes, Chiswick Park and Sky largely responsible for this growth. Inevitably with some very large buildings developed the profile of office floorspace provision shows lots of peaks and troughs, but over the 13 year period delivery averaged 12,000sq m GIA.

5.6 This high level of growth is matched by Hammersmith & Fulham, but the chart illustrates that compared to most of its neighbouring boroughs Hounslow is a strong office location supporting two and a half times the amount of floorspace compared to the outer London average.

Figure 5.1 Office floorspace – west London boroughs



Source: VOA, data up to 31st March 2012

5.7 To help us understand changes in provision since 2012 we use data from the London Development Database (LDD), supplied by the Council. We have added further analysis to this data by identifying whether the developments are within a designated employment area, or in non-designated locations.

Table 5.1 Completed developments involving office - 2012-2015

	Gains	Losses	Net change
Key Existing Office Location	58,846	5,153	53,693
SIL Preferred Industrial Location	0	670	-670
SIL Industrial Business Park	32,099	0	32,099
Locally Significant Industrial Sites	14,375	6,195	8,180
Non-designated locations	6,274	28,495	-22,221
TOTAL	**111,594**	**40,513**	**71,081**

Source: LDD

5.8 The table shows that floorspace gains comfortably exceed the losses. The gain in the Key Office location was Buildings 6 & 7 at Chiswick Park. The main loss in the office location was change of use of 2,500sq m to D1 in Turnham Green. The minor SIL loss was change of use to B2 of part of a unit at Commerce Road in the Brentford PIL. The SIL gain was the expansion of the Sky media broadcasting and production campus at Centaurus Park. The gain in the LSIS was B8 to B1a at Prologis Park.

5.9 In contrast the bulk of the losses were in the non-designated areas. The office losses in the non-designated areas are mostly in locations just outside town centre boundaries. It would be easier to protect existing offices if town centre boundaries were reviewed, so they include much of the office space which at present is just outside the existing boundaries. The gains in non-designated areas relate to a handful of modestly sized developments, the biggest of which was the redevelopment of an existing office building on Chiswick High Road to provide more intensive use of the site.

5.10 The location of the gains and losses are illustrated on map 5.1 at Appendix C.

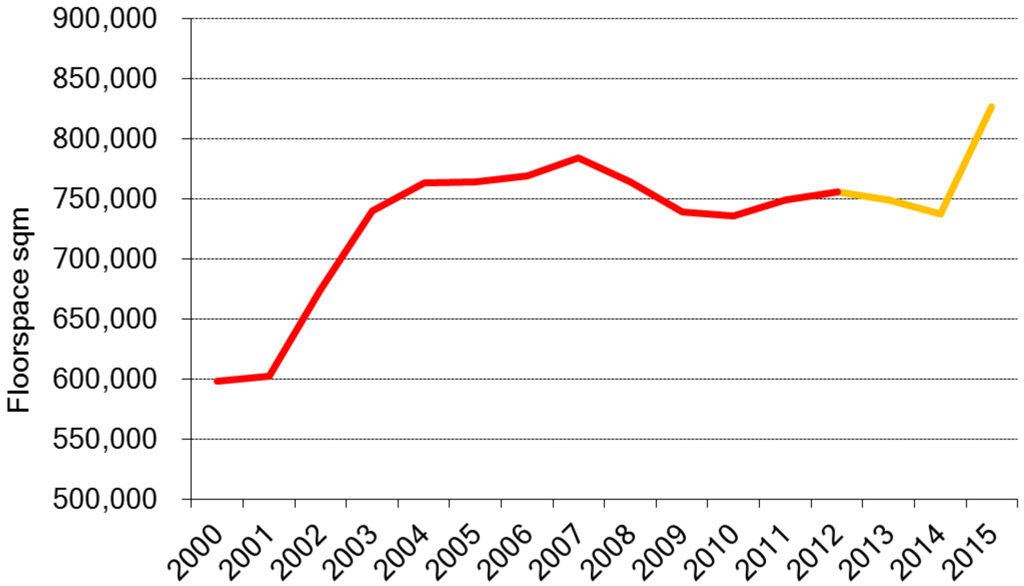
Table 5.2 Office floorspace, Hounslow, sq m

Floorspace 2012	756,000
Gains 2012-2015	111,594
Losses 2012-2015	-40,513
Floorspace 2015	**827,081**

Source: VOA to 2012 and LDD at Dec 2015

5.11 Taking the starting point for the amount of office floorspace as the latest VOA data, and then factoring in the gains and losses since March 2012 the current office floorspace figure for Hounslow is approximately 826,000sq m. The chart below illustrates the increase in office floorspace in Hounslow by adding the recent completions (the LDD data) to the VOA data. The strong upward trend in the most recent years relates in large part to two schemes at Centaurus Park and Chiswick Park that account for 90,000 sq m of the gains in office floorspace.

Figure 5.2 Office floorspace, Hounslow, sq m



Source: VOA 2012 and LB Hounslow LDD data 2015

5.12 This substantial growth in office floorspace has been both a quantitative and qualitative improvement, and in the case of Chiswick Park indicates that developers are prepared to build speculative office development in the right location in Hounslow.

5.13 But caution is needed as office growth in the borough has been very site specific over a longer trend period, focused on just three locations Chiswick Park, Sky/GSK and Bedfont Lakes.

5.14 As referred to in the property market analysis section above and as borne out at the workshop, the positive ‘picture’ painted for office by the recent completions does not reflect that in all of the Hounslow office market. The Council’s strategy is to direct new office development towards the town centres and the existing office developments at Bedfont Lakes, Chiswick Business Park and on the Great West Road (2 areas) (Policy ED1). While the latter locations have attracted new significant scale office investment, the same cannot be said for the town centres, which have steadily lost office space.

5.15 The town centres are generally descried as the secondary office market and these secondary locations have struggled in the past and based on the planning pipeline are likely to struggle even more in the future as office locations. A case in point is the Hounslow town centre High Street quarter scheme. The original 2005 permission included 30,000 sq m of office space, but the 2015 permission in line with the site allocation in the Local Plan does not include any office space reflecting the lack of demand for office space in this location. As we showed in the previous chapter the lack of demand for office space in the borough’s metropolitan centre is mirrored across all the other town centres with the exception of Chiswick.

5.16 The table below includes all outstanding permissions and starts involving gain/loss of office, and illustrates the scale of the issue faced by Hounslow. The location of the planning pipeline potential gains and losses are illustrated on map 5.2 at Appendix D.

5.17 The ‘Office locations’, a category that includes the town centres, have permissions that if implemented would result in the loss of approximately 40,000 sq m. But the potential loss of office space in non-designated locations is bigger still at 90,000sq m. A large proportion of these potential losses relate to permitted development change of office use to residential (a potential loss of 63,000sq m). Although not all of this potential loss will be realised, and to date only 2,400sq m of office space in the borough has been converted from office use, most if not all will not return to office use.

Table 5.3 Office floorspace - planning pipeline, Hounslow, sq m

	Gains	Losses	Net change
Key Existing Office Location	305	38,239	-37,934
SIL Preferred Industrial Location	0	243	-243
SIL Industrial Business Park	29,490	0	29,490
Locally Significant Industrial Sites	1,111	870	241
Non-designated locations	17,111	88,920	-71,809
TOTAL	**48,017**	**128,272**	**-80,255**

Source: LDD as at Dec 2015

5.18 The planning pipeline reverses the positive story in recent years about office growth, albeit this shift to a loss of office floorspace is in large measure driven by the prior approvals. Of most concern is the losses planned in the Office locations that total a potential loss of 38,000sq m. These losses are large numbers of prior approval permissions with the majority being for small to medium offices in Chiswick.

5.19 The prior approvals total 48 schemes of which approximately half are within town centres and the other half are mostly located just beyond the town centre boundaries. There are some large schemes in Hounslow and Chiswick town centres such as Central House, Lampton Rd and 414 Chiswick Rd.

5.20 The potential loses in non-designated areas include nearly 60 schemes for loss of office, of which more than half are via prior approval. The largest of which is the scheme to convert 12,000sq m of office to residential at the Vista Business Centre, Salisbury Rd, Cranford.

5.21 The whole increase in B1 space in the SILs relates to two schemes at Centaurus Park to expand the Sky studio, production and research and development facilities. Neither site had previously been in employment use so there is no corresponding loss of industrial floorspace. The principal gains in non-designated areas are the proposed redevelopment of a listed warehouse building in the Commercial Road industrial estate, a scheme at Chiswick Roundabout and the mixed use redevelopment of the Alfa Laval building in Brentford.

Demand

Introduction

5.22 We now move on to assess the demand for offices over the plan period. The data that underpins our assessment is employment forecasts provided by Experian Economics. We use the GLA's updated London Office Policy Review (LOPR) 2014 to sense check the Experian data.

5.23 While Experian and LOPR use different methods to forecast employment change, with Experian favouring an economic forecast based on the national macroeconomic trends adjusted to take account of local past trends, and LOPR using the triangulation method[24], they use the same employment sector definitions as the building blocks for their forecasts, and are therefore comparable.

Future jobs

5.24 The base data is Experian's forecast of future jobs change in Hounslow. This is shown in the 'workforce jobs in Hounslow by category' Table 5.4.

[24] The three elements are – an economic forecast, an assessment of the physical capacity and finally accessibility.

Table 5.4 Experian total employment forecast, Hounslow, jobs 2015-30

Workforce jobs in Hounslow by category	**Experian forecast**		**Change**	
	2015	**2030**	**Total**	**Per annum**
Accommodation & Food Services	7,880	9,610	1,730	115
Administrative & Supportive Services	19,670	22,820	3,150	210
Agriculture, Forestry & Fishing	30	20	-10	-1
Air & Water Transport	1,720	2,000	280	19
Chemicals (manufacture of)	-	-	0	0
Civil Engineering	440	480	40	3
Computer & Electronic Products (manufacture of)	380	410	30	2
Computing & Information Services	8,280	8,520	240	16
Construction of Buildings	1,740	2,010	270	18
Education	9,230	11,960	2,730	182
Extraction & Mining	610	560	-50	-3
Finance	1,830	2,040	210	14
Food, Drink & Tobacco (manufacture of)	830	700	-130	-9
Fuel Refining	10	-	-10	-1
Health	5,970	6,770	800	53
Insurance & Pensions	30	30	0	0
Land Transport, Storage & Post	17,210	20,460	3,250	217
Machinery & Equipment (manufacture of)	420	360	-60	-4
Media Activities	17,260	19,740	2,480	165
Metal Products (manufacture of)	410	330	-80	-5
Other Manufacturing	2,160	1,890	-270	-18
Other Private Services	2,920	3,210	290	19
Pharmaceuticals (manufacture of)	-	-	0	0
Printing and Recorded Media (manufacture of)	60	40	-20	-1
Professional Services	16,610	17,880	1,270	85
Public Administration & Defence	4,040	3,750	-290	-19
Real Estate	2,240	2,570	330	22
Recreation	5,180	5,710	530	35
Residential Care & Social Work	5,120	6,280	1,160	77
Retail	11,820	12,550	730	49
Rubber, Plastic and Other Non-Metallic Mineral Prc	320	240	-80	-5
Specialised Construction Activities	6,690	7,720	1,030	69
Telecoms	1,140	1,130	-10	-1
Textiles & Clothing (manufacture of)	10	10	0	0
Utilities	330	320	-10	-1
Wholesale	15,620	17,210	1,590	106
Wood & Paper (manufacture of)	200	130	-70	-5
TOTALS	**168,410**	**189,460**	**21,050**	**1,403**

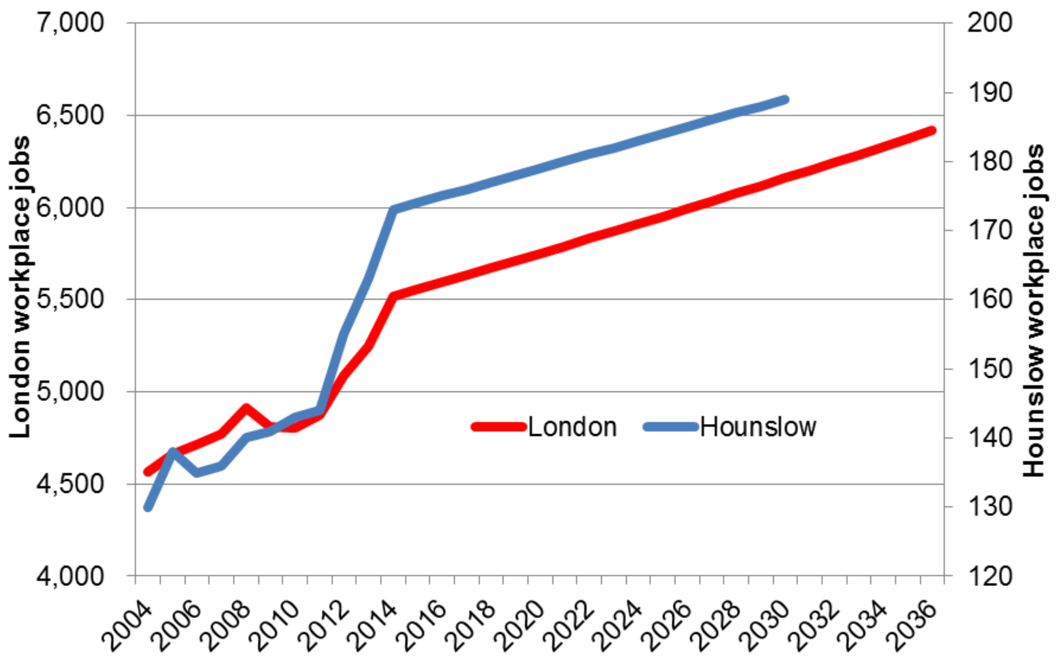
Source: Experian Economics

5.25 Experian forecasts that over the plan period total employment change in Hounslow will increase by 21,000, or 1,400 jobs per year. The key growth B class sectors are forecast to be transport/storage, wholesale and media.

5.26 Economic forecasting at the national or regional level is very reliable because if the size of the sampling and data sets. The smaller the area the smaller the sampling / data set and the more scope for variance and unreliability. Local borough level modelling can be subject to large margins of uncertainty. Hence we now sense check the forecast against LOPR.

5.27 The chart below compares total job change in Hounslow and London as a whole, and shows a similar profile for the past trend, although job numbers in Hounslow did not show the same recessionary dip in the late 2000s as compared to London as a whole. But the key issue to note is the very strong recovery in the period to 2014. This is stronger in Hounslow compared to London as a whole, and tallies with the strong growth in office jobs over the post-recessionary period. This three year period contains a very rapid increase in jobs, before the projected trend reverts to pre-recessionary rates.

Figure 5.3 All jobs, London and Hounslow, thousands



Source: GLA Economics, Updated employment projections for London, July 2015

5.28 LOPR uses these forecasts to project employment growth. As can be seen in the first two rows of Table 5.5 below forecasting employment change including this period of very rapid growth does produce a much higher overall growth rate even over a longer period. The average rate of total jobs growth for 2011/36 (inclusive of the rapid growth), was twice the rate of the change projected for the Local Plan Review period – 2015/30, generating the 0.49 ratio figure. This demonstrates that the GLA forecasters predict a much slower rate of growth for the future compared to the past.

Table 5.5 Hounslow jobs

Period	Change	Years	Average pa
Hounslow total jobs			
2015-2030	15,000	15	1.00
2011-2036	51,000	25	2.04
Ratio between 15 and 25 year projections			***0.49***
Hounslow office jobs			
2011-36 - LOPR projectior	19,000	25	760
2011-36 - LOPR adjusted	9,314	25	373

Source: GLA Economics, Updated employment projections for London, July 2015

5.29 We next apply the same ratio of change to the LOPR office jobs change estimates. LOPR's view is that over the London Plan period (2011-36) office jobs in Hounslow will increase by 19,000, or 760pa. But, if we apply the ratio for total jobs to office jobs the growth rate halves and the annual average reduces to 372pa, which is very close to Experian's forecast of 384/pa (see Table 5.6 below).

5.30 Thus, we conclude that Experian's forecasts are consistent with LOPR, and therefore reasonable.

Sector to land use

5.31 Only part of the 21,000 forecast jobs growth over the period for Hounslow will need employment (B-class) floorspace. To convert the employment forecast into demand for office space we firstly translate Experian's economic categories into office jobs, using a sector-to-land use mapping approach that is explained at Appendix B .

5.32 Table 5.6 below is the product of sector to land use mapping. The mapping indicates office jobs growth will total 5,800 over the 15 years, averaging 384pa. Some of the other 15,000 jobs created will be B class industrial jobs, but many will be based in other types of non-B class property, such as retail units, schools and hospitals.

Table 5.6 Experian office jobs forecast, Hounslow – 2015/30

Office jobs in Hounslow by category	Experian forecast	
	Per annum	Total
Accommodation & Food Services		
Administrative & Supportive Service Activities	94	1,416
Agriculture Forestry & Fishing		
Air & Water Transport		
Chemicals		
Civil Engineering		
Computer & Electronic Products		
Computing & Information Services	16	240
Construction of Buildings		
Education		
Extraction & Mining		
Finance	14	210
Food, Drink & Tobacco		
Fuel Refining		
Health		
Insurance & Pensions		
Land Transport, Storage & Post		
Machinery & Equipment		
Media Activities	157	2,355
Metal products		
Other Manufacturing		
Other Private Services	8	124
Pharmaceuticals		
Printing and Reproduction of Recorded Media		
Professional services	82	1,228
Public Administration & Defence	-9	-140
Real Estate	22	330
Recreation		
Residential Care & Social Work		
Retail		
Rubber, Plastic and Other Non-Metallic Mineral Products		
Specialised Construction Activities		
Telecoms		
Textiles & Clothing		
Utilities		
Wholesale		
Wood & Paper		
TOTAL	**384**	**5,763**

Source: Experian Economics , Local Authority Economic Forecasts, Dec 2015

5.33 The main growth sector in Hounslow is media activities, which is forecast to continue to grow rapidly. The other two sectors with strong growth forecast are administration and professional services, which are more traditional office activities that generate a requirement across a broad range of business types. We had anticipated strong growth in the computing and information services sector, but the forecast growth is not as strong for Hounslow as expected.

Jobs to floorspace

5.34 Next we convert office jobs to office floorspace, and we do this by applying an average floorspace per worker figure, referred to as an employment density to the jobs data.

5.35 The LOPR 2014 recommends 11.3sq m gross internal area per worker as the most appropriate density figure to use[25]. This figure follows the LOPR 2014 update and is substantially higher (more workers to floorspace) than the previous LOPR average density figure of 13.7 sq m GIA. . This latest figure was generated from a sample of properties undertaken by the British Council for Offices that was by far the most extensive study of occupancy densities ever undertaken.

Table 5.7 Office jobs to floorspace, future change calculation, Hounslow, per annum and 2015-30

Change per annum	
Jobs[1]	384
Sq m per job (GIA)[2]	11.3
Annual floorspace need, sq m [3]	**4,689**
Total change 2015-2030	
Jobs[1]	5,763
Sq m per job (GIA)[2]	11.3
Floorspace need 2015-2030, sq m [3]	**70,333**

Source: [1] source Experian Economics, Dec 2015, [2] source: LOPR 2014 [3] product of jobs * sq m, includes 8% addition for vacancy

5.36 Applying the employment density and an 8% addition to allow for sufficient vacant stock to allow the office market to function efficiently equates to a floorspace need of approximately 70,000sq m GIA over the plan period, which is an annual requirement of 4,700sq m GIA, which is just a little over a third of Hounslow's record of past delivery in the period 2000/11 (12,400sq m pa).

5.37 This quantitative demand assessment is consistent with the findings of the property market assessment reported in the previous chapter that found rents are high, vacancy low and demand is, and will continue to be, strong for high quality campus style offices. Supply and market balance

[25] source: Section 3.3, Mayor of London's London Office Floorspace Projections Report - July 2014

5.38 Line one in Table 5.8 below, identifies the floorspace needs associated with growth in the economy and additional jobs is the first step in the demand supply balance equation.

5.39 In addition to the net demand, we need to also replace the office floorspace that we know has been lost via outstanding planning permissions (line two of Table 5.8) and through the considerable number of prior approvals (line three). Planning permissions and prior approvals total 128,000sq m and inflate the demand figure to just below 200,000sq m GIA.

5.40 On the supply side, and counter-balancing the outstanding permissions that add to the demand figure, are current planning permissions that propose additional office space. As referred to above new building (Building 2) at Sky accounts for half the proposed additional floorspace. We do not provide a net floorspace increase figure for outstanding allocations as a number of the sites allocated for a mix of uses including office are currently in office use and the intensive use of these sites is unlikely to yield a quantitative increase, albeit a qualitative improvement is expected.

5.41 This assessment only takes in known current permissions and does not forecast future windfalls. It is likely that the number of prior approvals will decline as the most opportune buildings will have already been considered by now, and the Article 4 direction will come into effect later this year. We include the whole of the office to residential losses known to date within the figure for losses that need to be replaced as it is very unlikely that any office stock once it has permission for higher value residential will return to office use.

Table 5.8 Office floorspace – demand supply balance, 2015 – 2030

DEMAND	**Sqm GIA**
Demand (net change)	70,333
Committed losses (sites started and with extant permissions for other uses)	65,237
Outstanding Prior Approvals	63,035
Gross demand	198,605
SUPPLY	
Outstanding permissions	47,985
Outstanding allocations (assume no net increase)	
Committted gross supply	47,985
FORECAST MARKET BALANCE - 2015-2030	
Over (or under) supply	**-150,620**

Source: PBA

5.42 Thus, based on the current planning position the borough has a major supply deficit against the forecast demand. While the predicted demand is for 70,000 sq m of additional space, the current planned supply is negative – the sum of permitted losses of existing space and outstanding prior approvals. This negative supply totals c80,000 sq m. To keep the market in balance over the plan period we need additional land to accommodate 150,000 sq m – 80,000 to replace the space lost and 70,000 to meet the future demand for additional space. In the next section we consider where this additional supply might be provided.

Additional supply

5.43 We have assessed existing office clusters[26] and potential opportunities against the analysis of market requirements in Chapter 4. As a result we suggest that sites in the following clusters should be considered for office development or redevelopment.

Table 5.9 Potential office sites

Potential locations (plan period)	Description	Potential Area (ha)	Current Policy	Plot ratio	Potential floorspace sqm GIA
Great West Road (Riverbank Way) (cluster 4)	The public transport improvements currently being promoted will make this location more suitable for office use. Opportunity to replace a low density office site with higher density development across the whole site. Total site area = 2.5 ha.	2.5	Key Existing Office Location	90%	22,500
Chiswick Power Road (part) (cluster 45)	Opportunity for Chiswick Park style campus on part of the estate. Total site area = 6 ha	2.0	Locally Significant Industrial Site	90%	18,000
Great West Road Industrial Business Park (part) (cluster 8)	The public transport improvements currently being promoted will make this location suitable for office use. Potential for a campus style office development on a proportion of the SIL. Total site area = 36 ha.	10.0	SIL PIL	90%	90,000
Sub-total					**130,500**
Land adjacent to Clockhouse roundabout	Potential for new office campus similar in concept to Bedfont Lakes.	3.0	Green Belt	60%	18,000
TOTAL					**148,500**

Source: PBA

5.44 All these potential sites are in clusters in the plan review areas – the first three in the Great West Corridor and the fourth in the West of the Borough.

5.45 We have made a broad estimate of the potential site areas that could be used for office use at these locations, and applied plot ratios[27] that err on the cautious side. The 2012 LOPR uses an average 90% plot ratio for outer London locations, 180% for inner London and the ratio rises to nearly 800% in the CAZ. We have applied

[2626] A cluster is a grouping of predominantly office (or industrial) uses in one defined location. The clusters of office and industrial activity are reviewed in the Cluster appraisal (Appendix A)

[27] Plot ratio = the ratio of a building's total floor area (gross internal area) to the area of land upon which it is located.

60% for sites in the west of the borough, and 90% for locations in the east of the borough where development is generally higher density. By way of comparison the density at Chiswick Park is approximately 110%.

5.46 These are broad estimates, and the conclusion we reach is that there are few, indeed only two existing office clusters that offer up the opportunity for intensification, but even these could only contribute in the order of 40,000 sq m of additional office floorspace. This is not to say that there will not be windfall office sites that will come forward over the plan period, but we expect windfall gains to be matched and probably exceeded by windfall office losses.

5.47 To meet the level of demand identified requires other land to be designated as office locations, and the two prime candidate sites are the Great West Road SIL and land to the west of Clockhouse roundabout. These sites would potentially offer a different office environment akin to Chiswick Park campus in the case of the SIL, and akin to Bedfont Lakes in the case of land west of Clockhouse roundabout.

5.48 Together the first three clusters listed in Table 5.9 above could deliver additional office space in the order of 130,000sq m GIA. While this does not cover all of the demand identified it does reduce the gap to approximately 20,000sq m.

5.49 None of these clusters are easy and straight forward as discussed below, but they represent the best opportunities to increase the provision of, and demand for, office floorspace in the borough. Riverbank Way represents an opportunity to intensify an existing office location, but office redevelopment at Power Road and the Great West Road SIL would lead to a potential reduction in the amount of industrial land. While it will be possible to make better use of industrial sites, it is not possible to intensify and increase plot ratios to the same extent that it is for offices. Thus, we work on the conservative basis that the industrial losses identified in the above table need to be re-provided in full elsewhere. These losses add to the industrial demand figure discussed in the next section.

5.50 Riverbank Way is an existing low density office development on the southern side of the Great West Road adjacent to the currently vacant Great West House. The location currently lacks the services, environment and importantly the public transport accessibility to generate the critical mass for successful office activity. Our view is that opportunities for expanding the office provision on the Great West Road more generally are linked to improvements to the public transport connectivity. Improvements to rail connections on the Hounslow Loop that are outlined in the Great West Road corridor transport proposals.

5.51 Power Road is a successful mix of light industrial and some office space, and attracts businesses in the creative industries. The cluster is 6 hectares in size and some of the buildings are likely to be inefficient users of space that give rise to opportunity for intensification. Public transport access is closest via Gunnersbury station, albeit at the present time capacity is constrained, and there are a number of bus routes on Chiswick High Road. The location provides an opportunity for high density campus style modern office but, the loss of the light industrial businesses in B1c/B2 space in this location should be minimised. Therefore our broad estimate is that only a third of the site should be redeveloped for high density office.

5.52 The plans for improvements to rail connectivity as outlined in the Great West Road corridor that should be delivered within the plan period, will create opportunities for office development close to stations along the route including at Brentford and Kew Bridge. We identify the Great West Road SIL that will benefit from both the Crossrail link and the Overground extension, as the key opportunity given its proximity to other office locations and Sky's Centaurus Park campus.

5.53 We have made a conservative estimate that approximately a third of the 36 hectares currently in industrial use could be redeveloped for office use, and this could deliver in the order of 90,000sq m. This would be sufficient for a headquarters office campus and more. Again the loss of 10 hectares of industrial land will need to be reprovided, and is therefore added to the industrial demand figure.

5.54 In addition to the above, and given that there are no other obvious options to meet the identified need for office floorspace, the Local Plan review should take the opportunity to explore the potential of including office development in the general vicinity of the Clockhouse roundabout (the fourth site listed in the table above) as the success of Bedfont Lakes demonstrates there is demand for office floorspace in this strategically located part of the borough. Clearly any release of Green Belt in this area will need to be achieved through comprehensive proposals to provide needed development that satisfies the exceptional circumstances test[28].

5.55 We make a broad assumption that a 3-hectare site can be identified for office development in the Clockhouse roundabout area. Such a site could deliver around 20,000 sq m of office floorspace.

Conclusions

5.56 The table below summarises the analysis above. It sets out the demand-supply position over the plan period assuming that our proposals are accepted. Demand and supply are now broadly in balance.

Table 5.10 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

[28] National Planning Policy Framework, 2012, paras 83-85

5.57 The supply demand balance gap can be closed by:

- Redevelopment at three sites – Riverbank Way and part of the Power Road and Great West Road SIL sites; and
- A new greenfield allocation at the Clockhouse roundabout.

5.58 Together, these sites could accommodate at least 150,000 sq m of office floorspace, closing the gap between demand and supply.

5.59 At two of the sites we have suggested office development would involve a loss of industrial sites. This may be considered an adverse impact, because industrial land in Hounslow is also in high demand and short supply. However, as we show in the next section, there are enough opportunities from intensification and new land allocations to fill the resulting gap in supply.

5.60 There are no obvious alternative ways of meeting the forecast future demand for offices in the borough. Windfall development, if any, will not be remotely equal to filling the deficit. Nor do we see any alternative new sites that would provide the quality that the market wants. The only other alternative in our view would be to 'export' demand through the Duty to Cooperate. But we cannot be sure that this is possible, and if it were possible it would deprive Hounslow of significant new employment opportunities.

5.61 Losses of office floorspace in areas just beyond town centre boundaries have been and will continue to be an important component of the overall need. Therefore we recommend that town centre boundaries be reviewed, so they include much of the office space which at present is just outside the existing boundaries. This should make it easier to protect such existing offices.

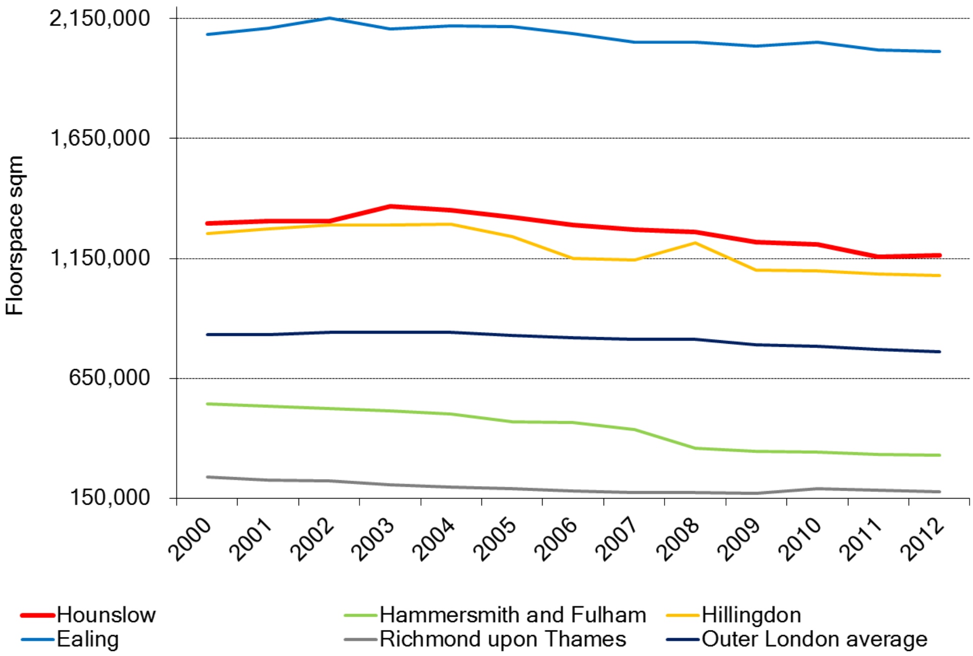
Industrial

Background

5.62 The picture for industrial floorspace, as illustrated in the chart below is different to that for office floorspace with continual gradual decline across the outer London boroughs over the early years of the millennium.

5.63 Change in Hounslow mirrors the outer London position, and has a very similar profile to Hillingdon. Both boroughs have considerably more industrial floorspace compared to other outer London boroughs, and this largely reflects the close proximity to Heathrow which drives the warehouse and logistics demand.

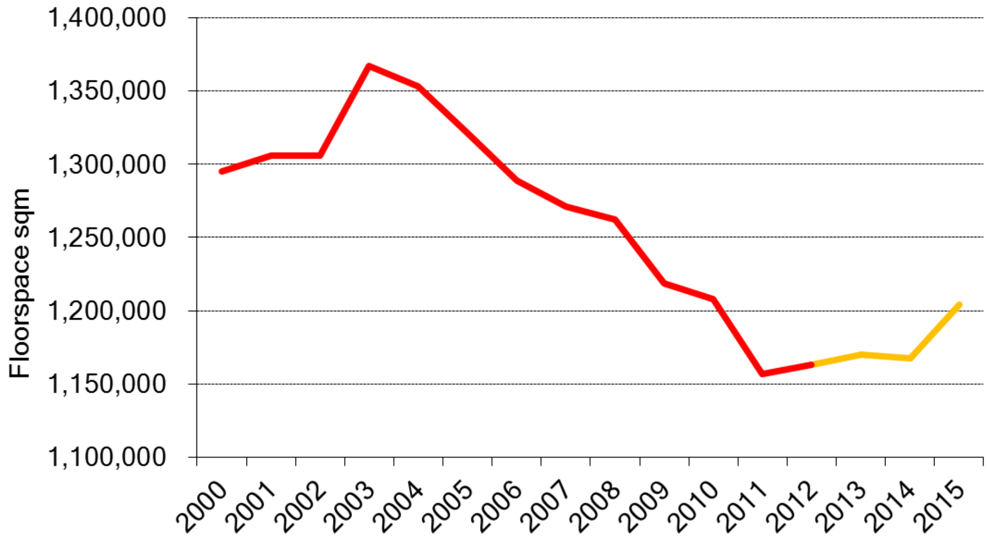
Figure 5.4 Industrial floorspace, Hounslow and neighbouring boroughs



Source: VOA, data up to 31st March 2012

5.64 Over this period Hounslow lost 132,000 sq m, which at a plot ratio of 40% is equivalent to 33 hectares. But 2012 saw a modest upturn in floorspace that has continued in subsequent years, with a substantial increase in 2015 that relates in large part to 51,000sq m gross (36,000sq m net) of studio production, research and development facilities and warehousing/storage at the expanded Sky campus at Centaurus Park.

Figure 5.5 Industrial floorspace, 2000-2015, Hounslow



Source: VOA 2012 and LB Hounslow LDD data 2015

5.65 Like many other outer London boroughs, Hounslow's loss of industrial sites has largely related to traditional manufacturing space, some of which will have been redeveloped for other B space activity such as logistics and office, but much will have been redeveloped for housing. 2011 marks the equilibrium point where losses and gains of industrial floorspace balance. The old industrial uses and the associated stock have largely been lost, and the stock of current industrial floorspace is largely used for services and distribution. In recent years demand for industrial space in the borough has been augmented by occupiers displaced from Inner London by strategic regeneration schemes such as Vauxhall Nine Elms Battersea. This will continue in future as further schemes are in the pipeline, including Old Oak Common at Park Royal.

5.66 The net change in the period since 2012 has been very positive with the gains being almost double the losses. The positive change was experienced in the SILs, collectively adding 50,000sq m, with the expansion of the media broadcasting and production campus at Sky accounting for the majority of this increase. There were 16 schemes in the Preferred Industrial Locations that were confined to locations in Cranford and Feltham North and many schemes involved flexible B1(c), B2 or B8 space. Change was broadly neutral in the locally significant sites with many schemes proposing flexible consents. Industrial floorspace beyond the designated locations has shown a modest reduction.

Table 5.11 Completed developments involving Industrial floorspace - 2012-2015

	Gains	Losses	Net change
Key Existing Office Location	0	51	-51
SIL Preferred Industrial Location	16,638	7,624	9,014
SIL Industrial Business Park	40,939	0	40,939
Locally Significant Industrial Sites	19,561	21,349	-1,788
Non-designated locations	14,999	20,882	-5,883
TOTAL	**92,137**	**49,906**	**42,231**

Source: LDD Dec 2015

5.67 Overall industrial floorspace has increased in the period since 2012 with new buildings in the SILs and replacement stock, much of it with flexible consents in the local industrial sites designation. The total stock has increased by 42,000sq m rising to a total of 1.2 million sq m.

5.68 The location of the gains and losses are illustrated on map 5.3 at Appendix E.

5.69 The growth in industrial floorspace in Hounslow over the past four years runs counter to the London Plan benchmark loss of 0.8 hectare per annum that was identified in the SPG.

Table 5.12 Industrial floorspace, Hounslow, sq m

Floorspace 2012	1,163,000
Gains 2012-2015	92,137
Losses 2012-2015	-49,906
Floorspace 2015	**1,205,231**

Source: VOA 2012 and LBH LDD data 2012-2015

5.70 The table below includes all outstanding permissions and starts involving gain/loss of industrial floorspace. The location of the planning pipeline potential gains and losses are illustrated on map 5.4 at Appendix F.

Table 5.13 Industrial floorspace –planning pipeline, Hounslow, sq m

	Gains	Losses	Net change
Key Existing Office Location	0	45	-45
SIL Preferred Industrial Location	1,043	0	1,043
SIL Industrial Business Park	22,800	0	22,800
Locally Significant Industrial Sites	25,316	9,948	15,368
Non-designated locations	48,693	102,956	-54,263
TOTAL	**97,852**	**112,949**	**-15,097**

Source: LDD as at Dec 2015. Figures relate to starts and live permissions.

5.71 The pipeline indicates that there are still considerable gains to come, but these will be exceeded by losses. The gain in the SIL is Building 2 at Sky. The most significant gain in the LSIS is two proposed B8 units totalling 11,000sq m in the Parkway Trading Estate.

5.72 The proposed losses will not be within the SILs, and are relatively minor in the locally designated industrial sites, but very substantial losses are planned in the non-designated areas. The big losses are those associated with the proposed new Brentford FC stadium at Lionel Road that removes approximately 50,000sq m of industrial space. Other losses of note are the proposed redevelopment of the 10,000sq m Reynard Mills site in the Windmill Road Estate for residential, and the redevelopment of the Hogarth Business Centre to residential and hotel that will result in an 8,000sq m loss of B1b space. Given the heavy losses of industrial space which have occurred in non-designated locations, and the large future need for additional industrial space, the Council should consider designating additional LSISs, in order to protect industrial floorspace in appropriate locations.

Demand

5.73 We now move on to assess the demand for industrial space over the plan period. As for the office calculations the data that underpins our assessment is employment forecasts provided by Experian Economics.

Future employment

5.74 The Experian base data for future jobs change in Hounslow is shown in the 'workplace jobs by category' in Table 5.4 in the Office section above. The data forecasts an increase of 21,000 jobs in Hounslow across all categories between 2015 and 2030.

Sectors to land use

5.75 As for offices, only part of the 21,000 forecast jobs growth over the period for Hounslow will generate a need for floorspace in the industrial employment classes (B1b, B1c, B2 and B8).

5.76 To calculate the demand for employment space we firstly translate Experian's economic categories into industrial jobs, as we did for Office jobs in the preceding section (the mapping and an explanation is included at Appendix B below).

5.77 Table 5.14 below is the product of the land use mapping process.

Table 5.14 Experian industrial jobs forecast, Hounslow, 2015-30

Industrial jobs in Hounslow by category	Experian forecast	
	Per annum	Total
Accommodation & Food Services		
Administrative & Supportive Service Activities	5	78
Agriculture Forestry & Fishing		
Air & Water Transport		
Chemicals		
Civil Engineering		
Computer & Electronic Products	2	30
Computing & Information Services		
Construction of Buildings		
Education		
Extraction & Mining		
Finance		
Food, Drink & Tobacco	-9	-130
Fuel Refining		
Health		
Insurance & Pensions		
Land Transport, Storage & Post	94	1,412
Machinery & Equipment	-4	-60
Media Activities		
Metal products	-5	-80
Other Manufacturing	-18	-270
Other Private Services	3	51
Pharmaceuticals		
Printing and Reproduction of Recorded Media	-1	-20
Professional services		
Public Administration & Defence		
Real Estate		
Recreation		
Residential Care & Social Work		
Retail		
Rubber, Plastic and Other Non-Metallic Mineral Products	-5	-80
Specialised Construction Activities	68	1,014
Telecoms		
Textiles & Clothing		
Utilities	-1	-10
Wholesale	92	1,385
Wood & Paper	-5	-70
TOTAL	**217**	**3,250**

Source: Experian Economics, Dec 2015 release

5.78 The mapping indicates industrial jobs growth will total 3,250 over the 15 years, averaging 217pa. Key sectors unsurprisingly are transport and storage, wholesale warehousing and construction activities which also involves storage and warehousing. Manufacturing is forecast to continue to decline.

Jobs to floorspace

5.79 Next we convert industrial jobs to industrial floorspace, and we do this by applying an average floorspace per worker figure, referred to as an employment density to the jobs data. For industrial floorspace we have used the recommended 44sq m/employee figure in the GLA's Industrial Land Demand and Release Benchmarks in London, December 2011. While the source is a few years old, average worker density figure is unlikely to have changed much if at all because industrial floorspace densities are much more stable compared to office space.

Table 5.15 Industrial jobs to floorspace, future change calculation, Hounslow, per annum and 2015-30

Change per annum	
Jobs[1]	217
Sq m per job[2]	44.0
Floorspace (GIA), sq m	9,548
Annual floorspace need (GIA), sq m[3]	**10,312**
Total change 2015-2030	
Jobs[1]	3,250
Sq m per job[2]	44.0
Floorspace (GIA), sq m	143,000
Floorspace need 2015-2030 (GIA), sq m[3]	**154,440**

Source: [1] source Experian Economics, Dec 2015, [2] Greater London Authority, Industrial Land Demand and Release Benchmarks in London, Dec 2011, Table 4.10 pg51, [3] builds in 8% for vacancy.

5.80 Applying the employment density and an 8% addition to allow for sufficient vacant stock to allow for floorspace 'churn' produces a floorspace need of approximately 155,000sq m GIA over the plan period, which is an annual requirement of 10,300sq m GIA, which is a reversal of Hounslow's record of past delivery in the first decade of the millennium (a loss of 10,200sq m pa). This is similar to delivery in the past four years, when the net floorspace gain averaged 11,800sq m pa as shown on Figure 5.5.

5.81 While the reversal in decline is encouraging, again a cautionary approach is needed as the growth in industrial floorspace is heavily linked to the B1b Sky facility at Centaurus Park.

5.82 This quantitative demand assessment presented above for the strategic logistics/warehouse sector is consistent with the findings of the property market assessment reported in an earlier chapter. That assessment identified a healthy demand for space in locations in the West of the Borough, in close proximity to Heathrow. The two assessments therefore have converging views on the demand for industrial space in Hounslow.

Supply and market balance

5.83 The table below follows the same format as the office demand/supply Table 5.8 above. It sets out the floorspace demand calculations that include additional jobs resulting from forecast growth and the committed losses to date and the outstanding permissions that will absorb some of the demand.

Table 5.16 Industrial floorspace, demand supply balance, 2015 - 2030

DEMAND	**Sqm GIA**
Demand (net change)	154,440
Committed losses (sites started and with extant permissions for other uses)	112,949
Gross demand	267,389
SUPPLY	
Outstanding permissions	97,852
Outstanding allocations	
Committted gross supply	97,852
FORECAST MARKET BALANCE - 2015-2030	
Over (or under) supply	**-169,537**

Source: PBA

5.84 Again consistent with the assessment for Office, the assessment for industrial only takes in known current permissions, and does not forecast what might be lost and gained in the future. We take the same position in respect of site allocations because all are currently in industrial use, and all are proposed for mixed use redevelopment, and hence it is difficult to gauge if there will be a net gain or loss. Evidence of the sites that have come forward so far indicates that these sites may yield net loss. But the issue with the allocated sites is their location, which does not tally with the areas of high demand in the west of the borough.

5.85 The committed losses exceed the outstanding permissions by approximately 15,000sq m, which takes the overall industrial land demand figure to 170,000sq m GIA.

5.86 Similar to offices, there is a major supply deficit against the forecast demand. While the predicted demand is for 155,000 sq m of additional space, the current planned supply from outstanding permissions is negative. But this negative supply is much smaller than for offices – just 15,000 sq m. Even so, to keep the market in balance would need an additional 170,000 sq m – to replace losses and meet the demand for additional space.

5.87 The above analysis takes no account of the industrial-to-office redevelopment proposed in the last section at Power Road and the Great West Road SIL. The estimated industrial losses to office at these two locations are 13 hectares. Applying an average 40% plot ratio equates to a floorspace figure of circa 50,000 sq m.

5.88 Thus, if our proposals are accepted, another 50,000 sq m is added to the requirement and the industrial supply deficit rises from 170,000 to 220,000 sq m over the plan period. In the next section we look for additional sites that could accommodate this unmet demand.

Additional supply

5.89 Next we look at the options within the borough for meeting the identified need for industrial floorspace. For industrial space we assume a plot ratio of 40%. But this is only applied to the clusters where there is opportunity for extensions. Where intensification is the option we half the ratio to 20% to reflect the need to 'net out' the existing industrial floorspace.

5.90 The main opportunities to accommodate additional floorspace are outlined in Table 5.17 below.

Table 5.17 Potential industrial clusters

Potential locations	Description	Size (ha)	Intensification Opportunity		Current Policy	Plot ratio	Potential floorspace sqm GIA
			%	Ha			
North Feltham Preferred Industrial Location (cluster 9)	Intensification	38	25%	9.5	SIL (PIL)	20%	19,000
Ascot Road Industrial Estate (cluster 12)	Intensification	9	25%	2.3	LSIS	20%	5,625
Hanworth and Popham Close Trading estate (clusters 21 & 22)	Intensification	10	10%	1.0	LSIS	20%	2,000
Bulls Bridge Industrial Estate (cluster 39)	Intensification	2	15%	0.3	LSIS	20%	600
Worton Road Industrial Estate (cluster 40)	Intensification	2	33%	0.7	LSIS	20%	1,320
Feltham Town Centre East (cluster 1023)	Intensification	18	10%	1.8	non-designated (policy ED2)	20%	3,600
Lawrence and Fairway Estate (cluster 1029)	Intensification	15	40%	6.0	SIL (PIL)	20%	12,000
Stanwell Road (cluster 1012)	Intensification	2.4	100%	2.4	non-designated (policy ED2)	40%	9,600
Sub total							**53,745**
Market Trading Estate (cluster 1034)	Extension	6	20%	1.2	Green Belt	40%	4,800
Radius Park (cluster 24)	Extension			10.0	LSIS Green Belt	40%	40,000
Land to the north west of Clockhouse Roundabout	Potential for new industrial park		100%	30.0	Green Belt	40%	120,000
TOTAL							**218,545**

Source: PBA

5.91 The list is longer than for offices, which reflects the large land areas that remain in industrial use in Hounslow. 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. There remains some scope to continue this trend, but because industrial space is essentially ground floor, albeit with some mezzanine space there is in fact less scope to intensify industrial use than there is for office use. Thus, we estimate that sites within the identified clusters could boost industrial floorspace by only just over 50,000 sq m. This still leaves a gap in demand supply balance of approximately 170,000 sq m. There has been a lot of intensification in the borough’s industrial areas in recent years, and the opportunity for more is limited largely to those included in the table above.

5.92 More land is needed for industrial use. In this regard the key opportunities are the two listed at the bottom of the table – an extension to Radius Park and land to the north west of Clockhouse roundabout, both of which are designated Green Belt. Setting aside the Green Belt designation for one moment, these sites are perfectly placed to the east and south of Heathrow Airport, with easy access to the Heathrow southern perimeter road and the cargo terminal. They both constitute prime opportunities to meet the demand for industrial floorspace growth in Hounslow.

5.93 New warehousing is being developed to the north of the perimeter road in London Borough of Hillingdon and to the south of the site on Bedfont Road, providing clear indication of what is needed and deliverable in this area. There is clearly huge demand for more industrial floorspace in this general location and these sites are certainly suitable for the types of industrial uses that are needed.

5.94 In the absence of obvious alternative sites to accommodate what is a large unmet requirement for airport-related industrial uses (warehousing and logistics) we have identified in the table above three Green Belt sites as suitable for industrial use. Any such change in the Green Belt boundary would be required to satisfy the Green Belt exceptional circumstances test[29] through the preparation or review of a Local Plan[30].

5.95 Land to the north west of Clockhouse roundabout is a large area that could be used for a number of purposes. Our view is that the site would most appropriately be used to meet the strong demand for airport-related industrial (warehousing and logistics) activity as next to the airport is the optimum location for these uses.

Conclusion

5.96 The table below summarises the analysis above. It sets out the demand-supply position over the plan period assuming that our proposals are accepted. Demand and supply are now broadly in balance.

Table 5.18 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					220,000
Potential supply to 2030					219,000
Supply (over supply) or shortfall					1,000

Source: VOA and PBA

[29] ibid

[30] DCLG (2012) National Planning Policy Framework paragraph 38

5.97 There are more sites in the existing industrial clusters that could provide additional floorspace through intensification. But it is much more difficult to increase the amount of industrial floorspace than it is to increase office floorspace. Therefore the eight clusters identified for intensification may deliver only in the order of 50,000 sq m.

5.98 The demand supply balance gap is unlikely to be closed by windfall development, which as for offices in all probably will widen the gap. To meet the strong demand for additional industrial floorspace will require additional sites to be identified, and we recommend the allocation of land at the three sites identified at the bottom of Table 5.17. Collectively these sites that are all located in the west of the Borough will close the gap by meeting the demand in the most appropriate part of the borough.

5.99 Future further losses of existing industrial floorspace in non-designated locations would add to the overall need. To stem future losses of perfectly viable industrial premises, the Council should consider designating more industrial areas as LSIS.

5.100 Our work has identified 16 non-designated industrial use clusters in the borough[31], and ideally all of these would be designated LSIS, and thus afforded a suitable level of protection of employment floorspace and jobs. But some of these clusters are very small, and to introduce a blanket designation would be likely to undermine the value of the LSIS designation. However, some of the existing LSISs are modest in size, Sun Life Trading Estate is 3.7 Ha and the Harlequin Centre is just 1.4 Ha. While the local significance of LSIS is about a range of measures, we consider that a broad threshold set at 1.5 Ha would capture the clusters likely to have local significance, and we recommend that these clusters are considered for LSIS designation:

- Hounslow Trade Park (cluster 1002)
- Bridge Road Depot (cluster 1005)
- Heathrow Logistics Park (cluster 1011)
- Stanwell Road Estate (cluster 1012)
- Twickenham Trading Estate (cluster 1021)
- Dairy Crest (cluster 1022)
- Bolney Way (cluster 1025)
- Fullers Brewery (cluster 1026)
- Worton Road (cluster 1027)
- Commerce Road (cluster 1033)
- Market Trading Estate (cluster 1034)

Heathrow airport expansion scenario

5.101 The ‘business-as-usual’ scenario discussed above includes future growth at Heathrow airport, in line with past trends. In addition we have modelled an

[31] Refer to Appendix A sites’ assessment

alternative demand scenario, in which Heathrow gains a third runway. The starting point of this scenario is a study commissioned by a group of West London Borough including Hounslow, which estimates the impacts of the proposed expansion on employment in each borough[32].

5.102 The table below extracts the job estimates from the study that are relevant to jobs growth in Hounslow at the base year (2010) and the forecast year (2030). The study identifies broadly two types of jobs:

- indirect/induced – defined as jobs relating to economic activity / spending on or by airport related businesses and employees; and
- catalytic – defined as jobs related to businesses that have chosen to locate close to the airport.

Table 5.19 Total jobs change in Hounslow resulting from a third runway at Heathrow

Heathrow related employment type	2010	2030	Job Change 2010 - 2030
Direct off airport / Indirect / induced	5,254	6,264	1,010
Catalytic	20,093	31,940	11,847
Total	**25,347**	**38,204**	**12,857**

Source: Heathrow Employment Impact Study, December 2013

5.103 The study forecasts that the total job generation in Hounslow as a consequence of a third runway at Heathrow could be in the order of 13,000 at 2030.

5.104 The above figures are total jobs, and we need to identify the B class jobs growth. For the direct off airport/Indirect/induced jobs category we assume the jobs generated will be in the same proportions as the current distribution. The current split is roughly 40:60 B class to all other categories, with office accounting for just over a quarter of the whole total and industrial 15%. The 'catalytic' jobs growth is purely generated by the improvements to Heathrow, and the attraction of businesses to locate in Hounslow close to Heathrow. These jobs are therefore likely to be entirely related to B class activity. We have therefore divided the jobs growth between the office and industrial categories, applying the two-thirds office to one third industrial ratio that currently exists.

5.105 In the table below we apply the ratios to the jobs growth in 2030.

[32] Parsons Brinckerhoff and Berkeley Hanover Consulting, *Heathrow Employment Impact Study*, December 2013. The economic impact of the third runway has also been assessed in other studies, part of the evidence base of the Airports Commission; but these studies relate to aggregate macroeconomic impacts and do not provide estimates for local areas.

Table 5.20 B Class Jobs and floorspace

	Office	Industrial
Direct off airport / Indirect / induced	276.48	156
Catalytic	7,579	4,274
Total B Class Jobs[1]	**7,855**	**4,430**
Sq m per job (GIA)[2]	11.3	44.0
Floorspace need in 2030, sq m [3]	**95,863**	**210,514**

Source: PBA

footnote: 1 source: Heathrow Employment Impact Study, 2013, adjusted by PBA

footnote: 2 source: LOPR 2014 (office) and Greater London Authority, Industrial Land Demand and Release Benchmarks in London, Dec 2011, Table 4.10 pg51 (industrial)

footnote: 3 product of jobs * sq m, includes 8% addition for vacancy

5.106 Approximately 8,000 new office jobs and 4,000 new industrial jobs will be generated in Hounslow. The office jobs forecast generates a future demand for office floorspace of approximately 96,000 sq m, which exceeds the 70,000 sq m net demand figure under the 'business as usual' scenario. The corresponding figure for industrial is 210,000 sq m, which also exceeds the 154,000 sq m net demand 'business as usual' figure. These estimates clearly show the huge potential opportunity and challenge for employment growth in the borough presented by a third runway at Heathrow.

5.107 The vast majority of the office jobs would be in businesses that value the proximity and connectivity benefits arising from a location close to an improved Heathrow. These jobs and the floorspace needed to accommodate them (an additional 96,000 sq m) are likely to favour the successful office locations close to the airport in West of Borough, locations in the Great West Road area and, but to a lesser extent, locations in Chiswick.

5.108 The vast majority of the businesses generating the 4,000 additional industrial jobs will only be interested in locations in the West of the Borough, because these jobs will be in airport and freight forwarding related activity, and close proximity to Heathrow will be paramount.

Conclusion

5.109 Based on the forecasts in the 2013 Heathrow Employment Impact Study, the scale of opportunity for employment growth presented by a third runway at Heathrow is greater than the forecast jobs growth through the 'business as usual' scenario discussed above. This illustrates the huge effect that a third runway at Heathrow would have on the Hounslow economy.

5.110 With the jobs generation comes an associated need for housing and social infrastructure to support the airport expansion.

6 CONCLUSIONS

6.1 In this final chapter we address the questions posed in the Introduction. We start with the three core questions set at paragraph 1.1 above and repeated below, dealing separately with offices and industrial space.

6.2 All of our conclusions and recommendations are made from an employment land perspective, without regard to the merits of other land uses and are for the Council to consider. The Council may set these recommendations aside after weighing up the merits of the various factors and alternatives in the course of preparing the two Local Plan Reviews.

Demand and supply: the core questions

Offices

How much additional land will be needed over the plan period to 2030?

6.3 Economic forecasts, supported by market analysis, suggest in the plan period 2015-30 the borough will need 70,000 sq m of net additional office space. Based on the forecasts in the 2013 Heathrow Employment Impact Study the Heathrow third runway scenario would add an additional net demand of 96,000 sq m.

What is the balance of demand and supply?

6.4 Against this future need or demand, Hounslow has a planning pipeline of 48,000 sq m of office space, mostly accounted for by the expansion of the Sky campus. But it also has a ‘negative pipeline’ of 128,000 sq m, comprising outstanding planning permissions and prior approvals which involve loss of existing office space. On balance, therefore, current planning commitments imply a net loss of 80,000 sq m of office space across the borough. Whilst there can be no guarantee that all of the commitments will be implemented, it is very unlikely that office space that is the subject of planning permission or prior approval will continue in office use. Given that the pipeline of office change is largely negative, and only covers the next three years, we consider it prudent to seek to reprovide the whole of the ‘negative pipeline’ figure, as any unimplemented permissions will in all likelihood be more than balanced by further losses through prior approval before the A4D comes into effect later on this year.

6.5 A significant proportion of the office floorspace losses have been in areas just beyond town centre boundaries. The Council should consider expanding these boundaries so it can protect existing offices more effectively.

6.6 To replace this loss and meet the demand for 70,000 of additional space to 2030, the Council should identify land to accommodate 150,000 sq m of new space, over and above existing commitments. Based on the forecasts in the 2013 Heathrow Employment Impact Study the Heathrow third runway scenario would increase this requirement by 96,000 sq m.

Should additional land be identified?

6.7 In line with the National Planning Policy Framework, the local planning authority should provide this land, so that the assessed need is fully met, unless it is prevented by constraints which are recognised in the Framework. Our analysis suggests that this can be done through:

- Redevelopment of sites within three office/industrial clusters – Riverbank Way, and a proportion of both Power Road and the Great West Road SIL. The Great West Road SIL is recognised to have poor connectivity. Were infrastructure, access and amenities to be improved, it is likely that this would provide a catalyst for future significant investment, and it would be attractive to promoters of office development. The boundaries of the Great West Corridor SIL designation would need to change in order to accommodate office growth.
- A new Green Belt allocation at the Clockhouse roundabout.

6.8 Together, these four locations could accommodate at least 150,000 sq m of office floorspace, closing the gap between demand and supply under the 'business as usual' scenario. The land requirement under a Heathrow third runway scenario increases by over 50%.

6.9 At two of the clusters we have suggested, office development would involve the partial loss of designated industrial sites. This may be considered an adverse impact, because industrial land in Hounslow is also in high demand and short supply. However, as we show in the next section, there are enough opportunities from intensification and new land allocations to fill the resulting gap in industrial land supply. One site is in the Green Belt, and a change in the boundary would be required through the review of the Local Plan.

6.10 These policy designations will need to be addressed before these sites could come forward for office development. Our work has not identified alternative ways of meeting the forecast demand for offices in the borough. Windfall development, if any, will not be remotely equal to filling the deficit. Nor do we see any alternative new sites that would provide the quality that the market wants. The only other alternative in our view would be to 'export' demand through the Duty to Cooperate. But we cannot be sure that this is possible, and if it were possible it would deprive Hounslow of significant new employment opportunities.

Are there unwanted office sites that might be released to other uses?

6.11 Our market analysis suggests that there is an oversupply of secondary offices, which are concentrated in and around the borough's town centres. But in coming years supply will be greatly reduced as a result of the very large losses that are currently committed, both from outstanding planning applications and prior approvals; and there will be continuing office demand for services to local communities. The danger is that supply may fall below this remaining demand, so small-scale local services are forced out of the borough by the overwhelming market pressure to build more housing.

6.12 For this reason we consider that 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. We also recommend a review of town centre boundaries, to increase the proportion of office space that is located within designated town centres. The Council should monitor vacancies and rents in this sector; if this shows that too much space is being lost, this will provide the evidence against applications for change of use.

6.13 Like all our conclusions, the above statement is made from an employment land perspective, without regard to the merits of other land uses. The Council may set it aside if it considers that housing or another alternative use has higher priority.

Industrial space

How much additional land will be needed over the plan period to 2030?

6.14 Our analysis suggests that in the plan period 2015-30 Hounslow will need 154,000 sq m of net additional industrial floorspace – defined here to include both production (factories / workshops) and logistics (warehousing). The expected growth is fuelled by airport-related logistics, together with local distribution and other services. Under the Heathrow third runway scenario an additional net demand of 187,000 sq m arises.

What is the balance of demand and supply?

6.15 Against this future demand Hounslow has a pipeline of outstanding planning permissions totalling 98,000 sq m. There is also a 'negative pipeline' of 113,000 sq m, from outstanding planning permissions which involve loss of existing industrial space. On balance, therefore, current planning permissions imply a future loss of 15,000 sq m of industrial space. The industrial-to-office redevelopments proposed in the last section would lead to a further loss of 52,000 sq m of industrial space.

6.16 To make good these losses and meet the demand for 154,000 sq m of net additional space, the Council should identify land to accommodate 220,000 sq m of industrial space over and above existing commitments. At the standard plot ratio of 40%, this would need a site area of 55 hectares. Under the Heathrow third runway scenario this overall requirement would almost double.

6.17 Given that most of the industrial losses have been in non-designated locations, we recommend that the Council consider designating more industrial areas as LSIS.

Should additional land be identified?

6.18 In line with the National Planning Policy Framework, the local planning authority should provide this land, so that the assessed need is fully met, unless it is prevented by constraints which are recognised in the Framework. Our analysis suggests that this can be done through:

- Intensification at a number of existing industrial clusters.

- Three new allocations, comprising extensions to Radius Park and the Market Trading Estate and a new site to the north west of Clockhouse roundabout;

6.19 We have looked at the existing industrial clusters, and whilst there is some scope for intensification (circa 50,000 sq m) there is insufficient land to meet the demand. Additional sites are required, but there are no obvious sites within the built up area, and we have had to cast the net more widely. All three of the proposed new allocations are currently designated as Green Belt, and could contribute 165,000 sq m. The Clockhouse roundabout is by far the largest component of this total at 120,000 sq m, followed by Radius Park at 40,000 sq m.

6.20 In total our suggestions would produce an estimated 218,000 sq m, virtually closing the gap between demand and supply. However, if the Green Belt opportunity does not come forward through the Plan review then as is the case for meeting the demand for office space, the only alternative in our view would be to 'export' demand through the Duty to Cooperate. The need to increase the supply of land would of course be hugely increased, nearly doubled, should the Council seek to meet the opportunity for employment growth presented by a third runway at Heathrow.

Are there unwanted industrial sites that might be released to other uses?

6.21 The recently published London Industrial Land Supply and Economy study[33] prepared by Aecom for the Mayor of London as part of the evidence base for the next London Plan, identified that Hounslow has lost 15.5 Ha over the past five years, set against the Mayor's benchmark figure of 15 Ha for the 20 year period to 2031. This rate of loss is alarming, albeit according to data in the borough AMRs, the losses have all been outside of the designated industrial areas. Clearly the rate of loss has far exceeded that anticipated. The Aecom study concludes that industrial land release has been generally excessive across London, and that policy will need to shift at some point from one of supporting appropriate managed release to one of retention of industrial land. In Hounslow's case there is clearly a need for urgent review, and the borough is a strong candidate to switch as soon as possible to a policy of industrial land retention.

6.22 The site appraisals show that there is no obvious old unsuitable industrial stock left in the Borough that is ripe for redevelopment, as for many years this type of stock has been recycled for either employment uses, or more commonly alternative uses, particularly stock in the eastern part of the Borough. The Reynard Mills in the Windmill Road Estate, Brentford are a recent example of an industrial site with planning permission for redevelopment for residential uses.

6.23 The stock of floorspace available and suitable for redevelopment for alternative uses has reduced substantially to the point where demand and values are such that it is almost always now viable to maintain, and in most parts of the Borough

[33] GLA London Industrial Land Supply and Economy study 2015, published March 2016, prepared by Aecom

(and all parts of the West of the Borough) viable to redevelop the existing sites for industrial uses. Hence we identify in chapter 5 a number of industrial sites that are suitable and viable for future intensification of industrial uses.

6.24 Thus, from an industrial market perspective there is no justification for releasing any industrial sites for other uses. But this conclusion, like our earlier conclusion on offices, leaves aside the need for land for other uses. In the last section we have suggested redeveloping some industrial sites for offices, because the need for offices is pressing and the industrial land lost can be replaced elsewhere. Similarly the Council might decide that releasing industrial land is justified by needs that have higher priority, such as housing. This kind of decision is beyond the scope of our report.

Other issues

6.25 Finally in this section we summarise our findings on the more detailed issues listed at paragraph 1.2 in the Introduction.

Define the functional economic market area (FEMA) of which the borough of Hounslow forms part

6.26 We recommend the FEMA should combine Hounslow with the local authority areas of Hillingdon, Ealing, Richmond, Spelthorne and Slough. This is far from being the only possible definition of the FEMA, but in our opinion it is the most helpful. Under the Duty to Co-operate the Council should share the findings of the present study with the other authorities in the FEMA, and work with them to resolve any imbalances between the supply and demand of employment land across the FEMA.

Assess existing and planned employment sites in the borough, to see if they are suitable to meet future needs for employment land (addressed in Chapters 4 and 5)

6.27 As discussed above (para 6.11 onwards and 6.21 onwards), we consider that all or virtually all of the existing employment sites in the borough are fit for purpose, with the possible exception of some secondary offices in and around town centres.

Analyse the likely balance of land demand and supply over the plan period

6.28 This matter is also covered above in the last section. Given current planning commitments and policies, the planned land supply for both office and industry falls far short of the expected demand over the plan period. We propose new land allocations to close the gap, identifying specific sites for development or intensification.

For the demand assessment above, use employment forecasts and test a range of employment forecasts (chapter 5)

6.29 Our demand figures are partly based on employment forecasts from Experian and the Mayor’s London Office Policy Review (LOPR).

Provide guidance on any employment land that might be released to other uses, and conversely on any need for additional employment land to be identified (Chapter 5)

6.30 As noted earlier we have found no existing employment sites that are unwanted for employment. Therefore we do not proposed any land release to non-employment uses. Nevertheless the Council might allow such releases if it considers that other uses, such as houses, have higher priority.

In particular, assess the needs of Hounslow's emerging sectors, such as media and broadcasting. Consider how far these needs can be met by allocating new sites in the preferred employment locations and the Local Plan Review areas at the Great West Corridor and West of the borough, which are identified for large-scale development and redevelopment in the Local Plan (Chapters 4 and 5)

6.31 For high-value corporate occupiers in the emerging sectors, Hounslow's business parks and the Great West Road provide highly suitable accommodation. Additional development and redevelopment at the sites we have identified will generate a large volume of additional supply that should be equally attractive.

6.32 But smaller, less profitable businesses in the emerging sectors have difficulty finding space in Hounslow. The reason is that the 'edgy' spaces that they favour are often too expensive, due to the competition from higher-value uses including the premium offices mentioned above. Therefore creative SMEs may be priced out so they locate in cheaper parts of London.

6.33 The Hounslow Regeneration and Economic Development Strategy 2016-20 (Draft for adoption) identifies creative and digital industries as a strategically important sector, which it will support through targeted interventions. Our study identifies the substantial growth potential of this sector in Hounslow. As one of these interventions the Council might consider providing or subsidising accommodation for SMEs in the sector. But any such proposal should be carefully appraised to ensure that it does not simply displace demand from other parts of London, where appropriate space is cheaper and there may be no lack of supply.

Make policy recommendations on:

- *The implications of change at Heathrow Airport*

  We have estimated the implications of a third (or extended northern) runway at Heathrow based on the forecasts in the 2013 Heathrow Employment Impact Study, Compared to the 'business-as-usual' scenario development at Heathrow increases the future need for office floorspace by over 50% (adding 96,000 sq m to the requirement) and doubles the industrial floorspace need (adding 210,000 sq m). Green Belt incursions are considered necessary to meet the 'business as usual' need, and would be all the more necessary to meet the Heathrow growth scenario.

- *How employment land provision can support emerging sectors*

  See paragraph 6.33 above.

- *How the Council can maintain an appropriate stock of offices, given that Permitted Development Rights (PDRs) allow offices to convert to residential use without planning permission*

  The flow of prior approvals should slow or stop when the Council's Article 4 Direction comes into force. To replace the office space already approved, at paragraph 6.7 onwards we set out proposals for new land allocations to provide additional offices.

- *The employment uses that could be accommodated in the Local Plan Review Areas*

  All the sites we recommend for additional office development are in one or the other of the Local Plan 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, but not exclusively so.

- *Other matters raised in the Local Plan Inspector's report*.

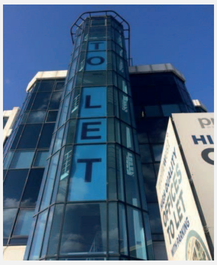
  The Inspector advised that the Local Plan did not identify enough land to accommodate the office demand forecast at the time, and it did not identify any new land at all for industrial uses. Our proposals for new site allocations, above, fill these gaps.

APPENDIX A SITES ASSESSMENTS

	CLUSTER APPRAISAL	Bedfont Lakes Business Park	Feltham Town Centre	Hounslow Town Centre
1	**Assessor**	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	**Date**	13 November 2015	25 November 2015	25 November 2015
3	**Site ID**	**1**	**2**	**3**
4	**Site Name**	**Bedfont Lakes Business Park**	**Feltham Town Centre**	**Hounslow Town Centre**
5				
6	**Site Address**	Bedfont Lakes Business Park, TW14 8HB	Feltham, TW13 4GU	Hounslow, TW3 1HL
7	**Description**	Modern business park	Town Centre with office uses located above retail facilities and at the edge of the centre.	Town Centre with office uses located above retail facilities and at the edge of the centre.
8	**Site Area, ha**	14.4	38.5	44.1
9	**Type of Employment**	Office	Office	Office
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Key Existing Office Location, CC4 Bedfont Green Conservation Area	Hounslow Local Plan (2015) - TC1-5 Feltham Town Centre, ED2 Key Existing Office Location, CC4 Feltham Town Centre Conservation Area	Hounslow Local Plan (2015) - TC1-5 Hounslow Town Centre, ED2 Key Existing Office Location
11	**Planning History**	No	There are lots of COU from Office to Residential, Hotel, and other uses.	Redevelopment of car park into a mixed use scheme of residential, cinema, retail, restaurant, café, infrastructure, and public realm. Also lots of COU from Office to Residential, and the development of a Hotel.
12	**Floodplain**	No	No	No
13	**Regeneration/ Priority Area**	No	No	Hounslow Local Plan (2015) - Archaeological Priority Areas
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	2 Good
16	**Suitability of Access**	1 Excellent	3 Reasonable	2 Good
17	**PTAL**	1b	4	6a
18	**Prominence/ compatibility of surrounding uses/ amenities**	4 Poor	2 Good	2 Good
19	**Layout, parking, servicing, landscaping**	1 Excellent	3 Reasonable	3 Reasonable
20	**Main occupiers and activities**	BP, Birdseye, IBM, SAP, Iglo Group, Menzies Aviation, Targus, Stratus Technologies, World Duty Free Group.	A variety of office space, the Space Studio West London and Axiom House.	Royal Mail Depot, Eurohouse offices, Ashley House offices, One Lampton Road, and Trinity Square Offices.
21	**Vacancy**	2 Low	2 Low	2 Low
22	**Redevelopment/ Intensification**	Bedfont Lakes Country Park Local Nature Reserve and SINC, and the Green Belt would prevent expansion.	The offices above the retail frontage are poorly maintained and show scope for redevelopment.	The offices are being marketed as residential apartments, these could be redeveloped into higher quality offices.
23	**If the site retains its current use, will it be occupied?**	1 Yes	2 Likely	2 Likely
24	**Reasons**	It's a high quality business park close to Heathrow Airport.	The offices have been neglected, but with improvement they can be a high quality employment offer.	Offices will need improved if to continue in current employment use.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	Offices could be mixed use and residential.	Offices could be mixed use/Residential.
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	It's a high quality business park close to Heathrow Airport.	This is a town centre area with many underutilised office buildings. There is scope for intensification.	Office buildings underutilised, need to be improved to prevent COU to residential.

CLUSTER APPRAISAL		Great West Road Key Existing Office Location	Brentford Town Centre	Chiswick Business Park
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	**Date**	09 November 2015	18 November 2015	09 November 2015
3	**Site ID**	**4**	**5 + 1016**	**6**
4	**Site Name**	**Great West Road Key Existing Office Location**	**Brentford Town Centre**	**Chiswick Business Park**
5				
6	**Site Address**	Great West Rd, Brentford, TW8 9DF	Brentford, TW8 8AY	Chiswick Business Park, W4 5YB
7	**Description**	Large office blocks and office parks located on the Great West Road.	Town Centre with office uses located above retail facilities and at the edge of the centre.	A large business park of high quality Grade A offices.
8	**Site Area, ha**	14.9	8.0	13.6
9	**Type of Employment**	Office	Office	Office
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Key Existing Office Location	Hounslow Local Plan (2015) - ED2 Key Existing Office Location, TC1-5 Brentford Town Centre, CC4 Grand Union Canal & Boston Manor Conservation Area.	Hounslow Local Plan (2015) - ED2 Key Existing Office Location
11	**Planning History**	No	Demolition of existing buildings as part of mixed use development of residential units, retail, business, and leisure uses. Also COU from Office to Residential.	Construction of one 9 and one 12 storey building for B1 use - now complete.
12	**Floodplain**	Yes	Yes	No
13	**Regeneration/ Priority Area**	No	Hounslow Local Plan (2015) Archaeological Priority Areas	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	1 Excellent	2 Good	2 Good
16	**Suitability of Access**	1 Excellent	3 Reasonable	1 Excellent
17	**PTAL**	3	3	4
18	**Prominence/ compatibility of surrounding uses/ amenities**	1 Excellent	2 Good	2 Good
19	**Layout, parking, servicing, landscaping**	2 Good	2 Good	1 Excellent
20	**Main occupiers and activities**	Glaxo Smith Klein, Samsung, Allianz.	A number of solicitors offices, and the new Market Building offices.	Discovery, Foxtons, Starbucks, Vue Entertainment, The Walt Disney Company, Swarovski.
21	**Vacancy**	3 Middling	2 Low	3 Middling
22	**Redevelopment/ Intensification**	The surrounding uses and the area of Metropolitcan Open Land to the north would prevent expansion.	The river prevents further expansion. There are opportunities for redevelopment within the mainly derelict old industrial area.	The SINC to the east, and other surrounding uses prevent expansion.
23	**If the site retains its current use, will it be occupied?**	1 Yes	3 Hard to tell	1 Yes
24	**Reasons**	Long established office use.	Brentford will experience many changes during the redevelopment - this will hopefully improve the employment offer.	It's a well located, high quality environment suitable for large national and multinational companies.
25	**For another employment use?**	No	Only suited to office.	No
26	**For alternative or mixed use?**	No	Many opportunities for alternative .	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	High quality office accommodation for multinational firms and associated research and development companies.	This is a town centre area with many underutilised office buildings. There is scope for intensification – especially at the south of the site where there are many vacant buildings. The site boundaries of both sites has been combined to reflect the reality of the site.	This is a high quality and well established employment site.

CLUSTER APPRAISAL		Chiswick Town Centre	Great West Road Industrial Business Park	North Feltham Preferred Industrial Location
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Andrew Lynch
2	**Date**	13 November 2015	18 November 2015	25 November 2015
3	**Site ID**	**7**	**8**	**9**
4	**Site Name**	**Chiswick Town Centre**	**Great West Road Industrial Business Park**	**North Feltham Preferred Industrial Location**
5				
6	**Site Address**	Chiswick, W4 5TE	Great West Road, TW8 9DN	Feltham, TW14 0TW
7	**Description**	Town Centre with office uses located above retail facilities and at the edge of the centre.	A large industrial and business park bordering the Great West Road.	Large distribution, storage, and light industrial site.
8	**Site Area, ha**	33.7	36.2	37.9
9	**Type of Employment**	Office	Mixed B Uses (Office & Industrial)	Mixed B Uses (Office & Industrial)
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Key Existing Office Location, TC1-5 Chiswick Town Centre, CC4 Chiswick High Road Conservation Area, GB2 Local Open Space, Areas of Special Character.	Hounslow Local Plan (2015) - ED2 Great West Road Industrial Business Park	Hounslow Local Plan (2015) - ED2 SIL Preferred Industrial Locations
11	**Planning History**	Residential led redevelopment, improvements to the public realm, cycle parking and creation of on and off-street parking. Also a lot of COU from Office to Residential.	Application to redevelop the Gillette Building into a part 4, part 6 building for B1 use, and an extension to the Gillette Building for use as a hotel and the masterplan campus development for BSkyB.	Lots of COU from Office to Residential and a few new industrial units/warehouses.
12	**Floodplain**	Yes	No	Yes
13	**Regeneration/ Priority Area**	Hounslow Local Plan (2015) Archaeological Priority Areas	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	1 Excellent	3 Reasonable
16	**Suitability of Access**	2 Good	1 Excellent	2 Good
17	**PTAL**	6a	2	2
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	2 Good	2 Good
19	**Layout, parking, servicing, landscaping**	1 Excellent	2 Good	3 Reasonable
20	**Main occupiers and activities**	Mostly local businesses such as estate agents and solicitors. National occupiers include Barclays and HSBC banks.	Brompton Bicycles ltd, Wolseley centres, majority of site occupied by Sky.	Fed Ex, Howdens, and Geoff Neal Lithographics.
21	**Vacancy**	2 Low	3 Middling	3 Middling
22	**Redevelopment/ Intensification**	Intensification and redevelopment may help diversify the current town centre offer.	The Gillette site is an opportunity for redevelopment. Expand to the west may be possible, although it is Metropolitan Open Land.	The office buildings could be redeveloped into warehouse/industrial uses. Expansion prevented by surrounding Green Belt and SINC.
23	**If the site retains its current use, will it be occupied?**	2 Likely	1 Yes	2 Likely
24	**Reasons**	Office stock will need to be improved to remain as employment use.	Sky has continued to invest in the area, providing new offices buildings for their own use.	Much demand for warehouse/industrial units in this area.
25	**For another employment use?**	No	This site is suited to a mix of employment uses.	No
26	**For alternative or mixed use?**	Offices could be mixed use/Residential.	The Gillette site has potential for alternative use.	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	Employment uses, especially offices, need to be retained within the town centre to enhance the mix of uses - want to prevent these turning to residential.	The Gillette Building could be redeveloped. There is potential to expand to the North West of this site, into what is currently vacant grassland of 4.1ha. The site boundary of southern site has been extended to include the employment land to the west.	A number of units have been upgraded to high quality modern industrial units. Others remain as poor quality units, and with redevelopment/improvements, these units provide an intensification opportunity.

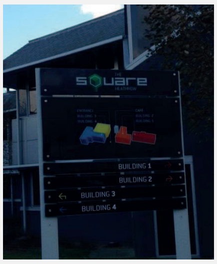
	CLUSTER APPRAISAL	Brentford Preferred Industrial Location	Cargo Service Centre	Ascot Road Industrial Estate
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	**Date**	18 November 2015	13 November 2015	13 November 2015
3	**Site ID**	**10**	**11**	**12**
4	**Site Name**	**Brentford Preferred Industrial Location**	**Cargo Service Centre**	**Ascot Road Industrial Estate**
5				
6	**Site Address**	Hounslow, TW8 9ES	Staines, TW19 7LE	Ascot Road, TW14 8QH
7	**Description**	Large business and industrial site with a refuse transfer station.	Oil terminal, bus depot, and cargo warehouses.	Warehousing and logistics site.
8	**Site Area, ha**	14.2	18.5	9.4
9	**Type of Employment**	Mixed B Uses (Office & Industrial)	Other	Strategic Distribution Park
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 SIL Preferred Industrial Locations	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	**Planning History**	No	No	Erection of storage and distribution warehouses
12	**Floodplain**	Yes	No	No
13	**Regeneration/ Priority Area**	No	Hounslow Local Plan (2015) Archaeological Priority Areas	Hounslow Local Plan (2015) Archaeological Priority Areas
14	**Impacts of Existing Use on Neighbours/ Environment**	Unpleasant smell	No	Noise may impact residential area
15	**Ease of Access/ Proximity to Roads**	1 Excellent	3 Reasonable	3 Reasonable
16	**Suitability of Access**	2 Good	3 Reasonable	2 Good
17	**PTAL**	3	1a	1a
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	3 Reasonable	3 Reasonable
19	**Layout, parking, servicing, landscaping**	3 Reasonable	3 Reasonable	1 Excellent
20	**Main occupiers and activities**	High quality profile west office building, as well as the refuse transfer station.	Swissport, Esso	Expeditors, Bridgestone, CCT group.
21	**Vacancy**	3 Middling	1 Nil	2 Low
22	**Redevelopment/ Intensification**	The railway line and river are significant constraints on redevelopment.	The SINC and GB to the east of the site prevents expansion.	The surrounding GB is a constraint. There are two areas for parking that could be developed.
23	**If the site retains its current use, will it be occupied?**	1 Yes	1 Yes	1 Yes
24	**Reasons**	The refuse transfer station dominates this site and will remain in use in this location.	West London oil terminal will use the site into the future.	It's a key distribution location and is close to Heathrow.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	The refuse transfer station dominates this site and will remain in use in this location.	This is on the Borough boundary, so there may be cross boundary issues to discuss at duty to cooperate meetings.	There are two parts of the site currently used as parking facilities, these could be redeveloped into employment land as this site is close to Heathrow and therefore in high demand.

CLUSTER APPRAISAL		Ashford Industrial Estate	Challenge Road and Bedfont North Industrial Estate	Feltham Business and Industrial Centre
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	Date	13 November 2015	13 November 2015	13 November 2015
3	Site ID	**13**	**14-15**	**16-20**
4	Site Name	**Ashford Industrial Estate**	**Challenge Road and Bedfont North Industrial Estate**	**Feltham Business and Industrial Centre**
5				
6	Site Address	Ashford, TW15 1AU	Challenge Road, TW15 1AX	Feltham, TW13 7AL
7	Description	Logistics and industrial site.	Large warehouse and logistics units, and small scale light industries and car yards.	Large business and industrial site, with offices and distribution centres.
8	Site Area, ha	5.2	7.5	10.3
9	Type of Employment	General Industrial	General Industrial	Mixed B Uses (Office & Industrial)
10	Planning Policy	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	Planning History	Lots of COU to mixed B uses	Development of industrial/warehouse units	COU from Office to Office/Industrial.
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	No	No	No
14	Impacts of Existing Use on Neighbours/ Environment	Noise may impact residential area	Noise and traffic may impact residential area	No
15	Ease of Access/ Proximity to Roads	3 Reasonable	3 Reasonable	2 Good
16	Suitability of Access	3 Reasonable	4 Poor	2 Good
17	PTAL	1a	1a	1a
18	Prominence/ compatibility of surrounding uses/ amenities	2 Good	2 Good	2 Good
19	Layout, parking, servicing, landscaping	4 Poor	3 Reasonable	3 Reasonable
20	Main occupiers and activities	IJS Global, GAP Plant and Tool Hire, Phoenix Air Cargo.	Boxer Motor Works, Gill Motors, Norri, Keltbray.	Ricoh UK and Medreich offices, Royal Mail, Loomis Distribution, Quest Freight, Perform (a sports media office).
21	Vacancy	3 Middling	2 Low	3 Middling
22	Redevelopment/ Intensification	The surrounding GB is a constraint. The older units on site have potential for redevelopment.	The GB to the west is a constraint.	The SINC to the south and the surrounding uses prevent expansion.
23	If the site retains its current use, will it be occupied?	1 Yes	1 Yes	1 Yes
24	Reasons	Offers a good range of B8 floorspace.	All facilities appear well used.	This is a well used location for a variety of employment uses.
25	For another employment use?	No	Increased warehouse/ logistics facilities.	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice		This is a well occupied local employment site which could be expanded to the east, into the vacant greenfield land of 7.1ha, if this does not impact on the Feltham Young Offenders institute. We have amalgamated the Challenge Road industrial estate and Bedfont north industrial park because they are interconnected.	We have amalgamated these sites because they are all interconnected.

CLUSTER APPRAISAL		Hanworth and Popham Close Trading estate	Feltham Marshalling Yards	Radius Park
1	**Assessor**	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	**Date**	13 November 2015	13 November 2015	25 November 2015
3	**Site ID**	**21-22**	**23**	**24**
4	**Site Name**	**Hanworth and Popham Close Trading estate**	**Feltham Marshalling Yards**	**Radius Park**
5				
6	**Site Address**	Hampton Road, TW13 6DH	Hounslow, TW4 5SY	Feltham, TW14 0NG
7	**Description**	Medium industrial site.	High quality, modern, medium scale office and distribution units.	Medium scale distribution and warehouse site.
8	**Site Area, ha**	10.4	10.5	7.9
9	**Type of Employment**	Mixed B Uses (Office & Industrial)	Mixed B Uses (Office & Industrial)	Strategic Distribution Park
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	**Planning History**	Demolition of units 2 and 3 on Mount Road.	No	Extension to existing storage unit and erection of single storey plant for the production of dry ice.
12	**Floodplain**	No	No	No
13	**Regeneration/ Priority Area**	No	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	2 Good
16	**Suitability of Access**	2 Good	1 Excellent	2 Good
17	**PTAL**	2	1b	4
18	**Prominence/ compatibility of surrounding uses/ amenities**	3 Reasonable	3 Reasonable	2 Good
19	**Layout, parking, servicing, landscaping**	4 Poor	1 Excellent	1 Excellent
20	**Main occupiers and activities**	Legacy House Offices, HSS Hire and a building trade centre, Skyline roofing, Wilson Electrical, CBS media, Ellis Wine, and PKS services.	Royal Mail, CEVA freight and the offices at Excaliber House.	CCL Customs Clearance LTD, Air Canada, Gate Gourmet, ASC Cargo Handling.
21	**Vacancy**	2 Low	1 Nil	2 Low
22	**Redevelopment/ Intensification**	The demolition of the two units at the rear of the sites presents an opportunity for development.	The surrounding uses, SINC and Green Belt prevent site expansion	The surrounding GB is a constraint. However, expansion of this site onto adjacent land could be considered.
23	**If the site retains its current use, will it be occupied?**	2 Likely	1 Yes	1 Yes
24	**Reasons**	The site is well used and at full capacity except for the two units with redevelopment potential.	This site is well used and well maintained.	This is a well used and well occupied site.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	The office units on this site are of a poor quality and do not fit the industrial nature of this site. These would be suitable for redevelopment. These sites have been clustered together because they are adjacent to one another.		This is a high quality site located very close to Heathrow.

	CLUSTER APPRAISAL	Sun Life Trading Centre	Heathrow Causeway Estate	Haslemere Heathrow Industrial Estate
1	**Assessor**	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	**Date**	25 November 2015	25 November 2015	25 November 2015
3	**Site ID**	**25**	**26**	**27**
4	**Site Name**	**Sun Life Trading Centre**	**Heathrow Causeway Estate**	**Haslemere Heathrow Industrial Estate**
5				
6	**Site Address**	Great South West Road, TW14 0PH	Ariel Way, TW4 6JW	Silver Jubilee Way, TW4 6NF
7	**Description**	High quality warehouse and light industrial site.	Medium high quality warehouse and distribution site.	High quality business and industrial park with wholesale retail and a flight training school.
8	**Site Area, ha**	3.7	3.8	11.0
9	**Type of Employment**	Strategic Distribution Park	Strategic Distribution Park	Mixed B Uses (Office & Industrial)
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	**Planning History**	Installation of mezzanine floor for additional floorspace	Development of lorry parking facility	No
12	**Floodplain**	Yes	Yes	Yes
13	**Regeneration/ Priority Area**	No	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	HGVs may impact local traffic
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	2 Good
16	**Suitability of Access**	2 Good	2 Good	2 Good
17	**PTAL**	1b	1b	1a
18	**Prominence/ compatibility of surrounding uses/ amenities**	4 Poor	3 Reasonable	4 Poor
19	**Layout, parking, servicing, landscaping**	1 Excellent	1 Excellent	2 Good
20	**Main occupiers and activities**	GE Aircraft Engine Services, Kuhene + Nagel, Do & Co Event and Airline Catering.	DHL	Screwfix, SDV/Virgin Atlantic, Tailsco, HSS Hire Shops, Asendia, British Airways Flight Training.
21	**Vacancy**	1 Nil	4 High	2 Low
22	**Redevelopment/ Intensification**	The reservoir is a constraint on expansion.	The river and surrounding uses are constraints on expansion. The vantage site is an opportunity for development.	The river and surrounding uses are constraints on expansion
23	**If the site retains its current use, will it be occupied?**	1 Yes	1 Yes	1 Yes
24	**Reasons**	Employment land is in high demand in this location.	High quality storage and warehouse facility close to Heathrow airport.	High quality industrial units and proximity to Heathrow.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**			

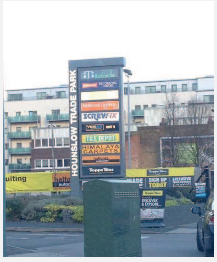
CLUSTER APPRAISAL		Heathrow International Trading Estate	Prologis Park	Cranford lane Industrial Estate
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	Date	25 Nov 15	25 November 2015	25 November 2015
3	Site ID	**28**	**29**	**30-32**
4	Site Name	**Heathrow International Trading Estate**	**Prologis Park**	**Cranford lane Industrial Estate**
5				
6	Site Address	Hounslow, TW4 6HB	Hounslow, TW4 6ER	Cranford lane, TW5 9QA
7	Description	Offices and storage facilities.	High quality distribution and office park.	Medium industrial estate, with distribution, warehouse, and light industrial units.
8	Site Area, ha	4.7	11.4	12.0
9	Type of Employment	Mixed B Uses (Office & Industrial)	Strategic Distribution Park	General Industrial
10	Planning Policy	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	Planning History	COU from B8 to flexible Mixed B	No	Erection of a detached warehouse and distribution unit, including B1 office space.
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	No	No	No
14	Impacts of Existing Use on Neighbours/ Environment	No	No	No
15	Ease of Access/ Proximity to Roads	2 Good	2 Good	2 Good
16	Suitability of Access	3 Reasonable	1 Excellent	1 Excellent
17	PTAL	1b	1a	2
18	Prominence/ compatibility of surrounding uses/ amenities	4 Poor	3 Reasonable	3 Reasonable
19	Layout, parking, servicing, landscaping	2 Good	3 Reasonable	2 Good
20	Main occupiers and activities	DHL, Office Depot, CK Depot, Hitachi Capital, Fusion Business Solutions, Yamato Transport, Allen's Catering.	British Airways and Sungard Availability Services. Smaller units with office facilities, occupied by Hiflux Ltd, ENI Shipping, and ILG.	Hikmat Ltd, FTS, Maxfoods Ltd, Asda 'Click and Collect' depot.
21	Vacancy	2 Low	2 Low	3 Middling
22	Redevelopment/ Intensification	Although an area of Green Belt, expansion to the south may be possible	Local Open Space designations and surrounding uses prevent site expansion.	Although Green Belt, land to the north and south could be used for expansion.
23	If the site retains its current use, will it be occupied?	1 Yes	1 Yes	1 Yes
24	Reasons	Proximity to Heathrow airport and motorway.	Well used site	This is a well occupied and functioning site.
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice	This is a high quality site located very close to Heathrow. There is scope for expansion of this site onto the 4.6ha of land to the south.		These sites have been amalgamated because they are adjacent to one another.

	CLUSTER APPRAISAL	North of M4 Spitfire Estate	Harlequin Centre	Serco
1	**Assessor**	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	**Date**	25 November 2015	25 November 2015	25 November 2015
3	**Site ID**	**33-36**	**37**	**38**
4	**Site Name**	**North of M4 Spitfire Estate**	**Harlequin Centre**	**Serco**
5				
6	**Site Address**	Hounslow, TW5 9NW	Southall, UB2 5NH	Middlesex, UB2 5ND
7	**Description**	Large industrial site, with storage and distribution units.	Recently refurbished office park.	Single occupancy site for Allport Cargo Services.
8	**Site Area, ha**	9.5	1.4	1.9
9	**Type of Employment**	General Industrial	Office	Mixed B Uses (Office & Industrial)
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	**Planning History**	COU from B8 to B2 and COU to allow for flexible consent B1c, B2, B8.	No	No
12	**Floodplain**	No	No	No
13	**Regeneration/ Priority Area**	No	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	2 Good
16	**Suitability of Access**	2 Good	2 Good	3 Reasonable
17	**PTAL**	1b	2	2
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	2 Good	2 Good
19	**Layout, parking, servicing, landscaping**	1 Excellent	1 Excellent	2 Good
20	**Main occupiers and activities**	Food distribution services, including LSG Skychefs. Other occupiers included Yara, TNT, and Tascor.	Harmoni and 2E2.	Allport Cargo Service
21	**Vacancy**	2 Low	2 Low	1 Nil
22	**Redevelopment/ Intensification**	The Green Belt, SINC and surrounding uses prevent site expansion.	The surrounding uses prevent site expansion.	The surrounding uses prevent site expansion.
23	**If the site retains its current use, will it be occupied?**	1 Yes	1 Yes	1 Yes
24	**Reasons**	This is a well occupied and functioning site.	The site has been recently refurbished and is well occupied.	This is a well occupied and functioning site.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	These sites have been amalgamated because they are adjacent to one another.		

	CLUSTER APPRAISAL	Bulls Bridge Industrial Estate	Worton Road Industrial Estate	Victory Business Centre
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	Date	25 November 2015	18 November 2015	18 Nov 15
3	Site ID	**39**	**40**	**41**
4	Site Name	**Bulls Bridge Industrial Estate**	**Worton Road Industrial Estate**	**Victory Business Centre**
5				
6	Site Address	Southall, UB2 5NB	Isleworth, TW7 6ER	Fleming Way, TW7 6DB
7	Description	Small scale and poor quality local industrial site.	Poor quality small local industrial site, with printing companies and car garages.	Medium warehouse and business park.
8	Site Area, ha	2.2	1.8	2.1
9	Type of Employment	General Industrial	Mixed B Uses (Office & Industrial)	Mixed B Uses (Office & Industrial)
10	Planning Policy	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	Planning History	Redevelopment of canal yard to provide 10 industrial units, with an allocation for builders merchants.	Demolition of dilapidated building, construction of 2 new industrial warehouses.	COU B8 to B1b/c
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	No	No	No
14	Impacts of Existing Use on Neighbours/ Environment	No	Noise and traffic may impact residential area	Noise and traffic may impact residential area
15	Ease of Access/ Proximity to Roads	2 Good	4 Poor	3 Reasonable
16	Suitability of Access	4 Poor	3 Reasonable	4 Poor
17	PTAL	2	1b	1a
18	Prominence/ compatibility of surrounding uses/ amenities	2 Good	3 Reasonable	2 Good
19	Layout, parking, servicing, landscaping	4 Poor	3 Reasonable	2 Good
20	Main occupiers and activities	Auto Fuzion Ltd, GB Tyres Ltd, and MSc Repair.	Warton hall Offices and storage facilities, also printing companies such as Perfect Image and the Printroom.	Orminston Wire, Ronot Coupe, Speedy Hire, London Basement
21	Vacancy	1 Nil	1 Nil	2 Low
22	Redevelopment/ Intensification	Builders merchant site shows scope for redevelopment.	Vacant building on site and parking could be redeveloped.	Mogden Sewage works is a constraint on expansion
23	If the site retains its current use, will it be occupied?	2 Likely	2 Likely	1 Yes
24	Reasons	There is high demand for employment land in this area.	This site is well occupied by local services.	High quality industrial site.
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice	This site was generally of a poor quality and there is definitely scope for improvements/intensification. The cluster boundary has been changed to exclude the Darussalam cultural centre because it is not an employment use.	This site was generally of a poor quality and there is definitely scope for improvements/intensification.	

CLUSTER APPRAISAL		Clock Tower Road Industrial Estate	Phoenix Trading Park	Kew Bridge Distribution Centre
1	Assessor	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	Date	18 Nov 15	09 Nov 15	09 Nov 15
3	Site ID	**42**	**43**	**44**
4	Site Name	**Clock Tower Road Industrial Estate**	**Phoenix Trading Park**	**Kew Bridge Distribution Centre**
5				
6	Site Address	Clock Tower Road, TW7 6GF	Ealing park, TW8 9PL	Brentford, TW8 9BW
7	Description	Medium industrial site, with wholesalers, light industrial units and offices.	Small site of car dealerships and a wholesale retail.	Industrial and business site, with offices, storage and industrial units.
8	Site Area, ha	5.6	3.3	4.6
9	Type of Employment	Mixed B Uses (Office & Industrial)	General Industrial	Mixed B Uses (Office & Industrial)
10	Planning Policy	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site
11	Planning History	No	No	Erection of motor dealership
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	No	No	No
14	Impacts of Existing Use on Neighbours/ Environment	Noise and traffic may impact residential area	No	No
15	Ease of Access/ Proximity to Roads	3 Reasonable	1 Excellent	1 Excellent
16	Suitability of Access	3 Reasonable	2 Good	3 Reasonable
17	PTAL	2	3	3
18	Prominence/ compatibility of surrounding uses/ amenities	2 Good	2 Good	3 Reasonable
19	Layout, parking, servicing, landscaping	3 Reasonable	3 Reasonable	2 Good
20	Main occupiers and activities	NHS, blink, Ring way, FSW, Techfront	Mercedes-Benz, Audi, Topps Tiles, Kwick Fix, Screw Fix	Sega, Big Yellow Self Storage, Brompton Bicycles, Mercedes Benz
21	Vacancy	2 Low	1 Nil	3 Middling
22	Redevelopment/ Intensification	Surrounding uses prevent site expansion.	Potential redevelopment of the Phoenix Trading Park - small units into large ones.	Redevelopment of the Kew Bride Distribution Centre to meet modern requirements.
23	If the site retains its current use, will it be occupied?	1 Yes	1 Yes	1 Yes
24	Reasons	High quality B1, B2 and B8 floorspace.	This is a well occupied employment area.	This is a long established office use. It's in a prominent location with good access to the M4.
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice			

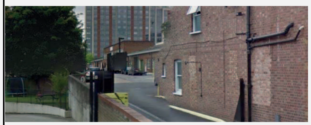
CLUSTER APPRAISAL		Power Road Industrial Estate	Bollo Road Estate	National Works Industrial Estate
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Andrew Lynch
2	**Date**	09 November 2015	09 Nov 15	25 November 2015
3	**Site ID**	**45**	**46**	**1001**
4	**Site Name**	**Power Road Industrial Estate**	**Bollo Road Estate**	**National Works Industrial Estate**
5			No photos permitted	
6	**Site Address**	Power Road, W4 5PY	London, W3 8QU	Hounslow, TW4 7EA
7	**Description**	Medium industrial and business estate.	London underground training facility.	Small scale industrial and business site.
8	**Site Area, ha**	6.1	11.1	0.8
9	**Type of Employment**	Mixed B Uses (Office & Industrial)	Other	Mixed B Uses (Office & Industrial)
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	Hounslow Local Plan (2015) - ED2 Locally Significant Industrial Site	No
11	**Planning History**	Redevelopment of office building into modern office units	No	No
12	**Floodplain**	No	No	No
13	**Regeneration/ Priority Area**	No	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	2 Good
16	**Suitability of Access**	3 Reasonable	3 Reasonable	4 Poor
17	**PTAL**	3	2	4
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	3 Reasonable	3 Reasonable
19	**Layout, parking, servicing, landscaping**	3 Reasonable	3 Reasonable	4 Poor
20	**Main occupiers and activities**	Saudi Arabia Cultural Bureau, The Light Box co-working office space, Chiswick Studios, and a Diving Centre.	London underground training facility.	Dart Air Services Ltd, Weldwide Services, and Elite Autos Ltd.
21	**Vacancy**	2 Low	1 Nil	2 Low
22	**Redevelopment/ Intensification**	No scope for expansion due to surrounding uses, however opportunity for intensification of office use.	No scope for expansion due to surrounding uses, however, there appeared to be some under utilised land, which could be intensified.	Surrounding residential uses prevent site expansion.
23	**If the site retains its current use, will it be occupied?**	2 Likely	2 Likely	2 Likely
24	**Reasons**	This cluster is well used by multiple types of employment.	Used as a training facility	The site provides space for local businesses.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	The cluster boundary has been changed to include the employment use at the Peugeot Showroom, Chiswick Roundabout.		

CLUSTER APPRAISAL		Hounslow Trade Park	Derby Industrial Estate	Bridge Road Depot
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	Date	25 November 2015	25 November 2015	25 November 2015
3	Site ID	**1002**	**1004**	**1005**
4	Site Name	**Hounslow Trade Park**	**Derby Industrial Estate**	**Bridge Road Depot**
5				
6	Site Address	Hounslow, TW3 3LL	Hounslow, TW3 3UH	Hounslow, TW3 1SQ
7	Description	Industrial and storage site, with some wholesale retail.	Small local industrial estate, with some offices.	Hounslow Waste Depot and Hounslow Highways offices.
8	Site Area, ha	2.5	1.0	1.9
9	Type of Employment	General Industrial	Mixed B Uses (Office & Industrial)	Other
10	Planning Policy	Hounslow Development Plan Proposals (2011) - Proposed Mixed Use Site (partially)	No	No
11	Planning History	No	No	No
12	Floodplain	Yes	No	No
13	Regeneration/ Priority Area	Hounslow Local Plan (2015) Archaeological Priority Areas	No	No
14	Impacts of Existing Use on Neighbours/ Environment	No	No	Unpleasant smell may impact residential area
15	Ease of Access/ Proximity to Roads	2 Good	2 Good	2 Good
16	Suitability of Access	2 Good	3 Reasonable	3 Reasonable
17	PTAL	4	6a	2
18	Prominence/ compatibility of surrounding uses/ amenities	2 Good	2 Good	2 Good
19	Layout, parking, servicing, landscaping	1 Excellent	4 Poor	2 Good
20	Main occupiers and activities	ScrewFix, Tile Depot, Halfords Auto Centre, and National Lighting.	R&J heating, Ventronic Imports, and Tile City amongst other local services.	Hounslow Council Highways offices and waste depot.
21	Vacancy	1 Nil	2 Low	1 Nil
22	Redevelopment/ Intensification	Surrounding residential uses prevent site expansion.	Surrounding residential uses prevent site expansion.	Surrounding residential uses and railway line prevent site expansion.
23	If the site retains its current use, will it be occupied?	1 Yes	1 Yes	1 Yes
24	Reasons	This is a well occupied and functioning site	This is a well occupied and functioning site.	This is a well occupied and functioning site.
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice	The boundary has been changed to exclude some residential units, and include the Big Yellow storage unit.	The boundary has been adjusted to exclude some residential units and retail uses.	

CLUSTER APPRAISAL		Heston Industrial Mall	Greenham House	Feltham Coachworks
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Jonathan Ngige
2	Date	25 November 2015	25 November 2015	25 Nov 15
3	Site ID	**1006**	**1007**	**1008**
4	Site Name	**Heston Industrial Mall**	**Greenham House**	**Feltham Coachworks**
5				
6	Site Address	Church Road, Hounslow, TW5 0LD	Isleworth, TW7 4EX	London Road, TW7 4EJ
7	Description	Small industrial estate with small distribution units.	Single occupancy office and distribution site for Greenham.	Local businesses and industrial site.
8	Site Area, ha	1.4	1.0	0.5
9	Type of Employment	General Industrial	Office	Mixed B Uses (Office & Industrial)
10	Planning Policy	No	No	No
11	Planning History	No	No	Redevelopment of industrial building into residential
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	Hounslow Local Plan (2015) Archaeological Priority Areas	Hounslow Local Plan (2015) Archaeological Priority Areas	Hounslow Local Plan (2015) Archaeological Priority Areas
14	Impacts of Existing Use on Neighbours/ Environment	No	No	Noise may impact residential area
15	Ease of Access/ Proximity to Roads	2 Good	2 Good	2 Good
16	Suitability of Access	3 Reasonable	3 Reasonable	2 Good
17	PTAL	2	6a	4
18	Prominence/ compatibility of surrounding uses/ amenities	3 Reasonable	2 Good	3 Reasonable
19	Layout, parking, servicing, landscaping	2 Good	2 Good	4 Poor
20	Main occupiers and activities	Mint Laundry Services, The Window Store, and MOT centre Heston.	Greenham's	Warren motors, and eurotech autocentre
21	Vacancy	2 Low	2 Low	2 Low
22	Redevelopment/ Intensification	Surrounding residential uses prevent site expansion.	Surrounding residential uses and Thornbury Park prevent site expansion.	Remaining employment land should be intensified to improve its offer.
23	If the site retains its current use, will it be occupied?	1 Yes	1 Yes	1 Yes
24	Reasons	This is a well occupied and functioning site.	This is a well occupied and functioning site.	Locally significant businesses.
25	For another employment use?	Offices	No	No
26	For alternative or mixed use?	Would suit mixed use/residential	No	Yes - residential
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice			The remaining employment use should be safeguarded, as redevelopment for residential could be possible. The boundary has been adjusted to exclude the recently redeveloped residential units.

CLUSTER APPRAISAL		Rennels Way	London Road Estate	Heathrow Logistics Park
1	Assessor	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Andrew Lynch
2	Date	18 November 2015	18 Nov 15	13 Nov 15
3	Site ID	**1009**	**1010**	**1011**
4	Site Name	**Rennels Way**	**London Road Estate**	**Heathrow Logistics Park**
5				
6	Site Address	Isleworth, TW7 6NJ	London Road, TW7 5AG	Bedfont Industrial Estate, TW14 8EE
7	Description	Small scale local industrial site.	Redevelopment site, new uses include car showroom and residential.	The site is currently being redeveloped into Heathrow Logistics Park and is scheduled for completion in 2016.
8	Site Area, ha	1.2	1.6	7.7
9	Type of Employment	General Industrial	Other	Mixed B Uses (Office & Industrial)
10	Planning Policy	No	No	Hounslow Local Plan (2015) - Metropolitan Green Belt
11	Planning History	No	Mixed use redevelopment into car dealership and residential	Currently being developed into Heathrow Logistics Park
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	No	Hounslow Local Plan (2015) Archaeological Priority Areas	No
14	Impacts of Existing Use on Neighbours/ Environment	Unpleasant smell may impact residential area	No	No
15	Ease of Access/ Proximity to Roads	2 Good	2 Good	2 Good
16	Suitability of Access	2 Good	3 Reasonable	2 Good
17	PTAL	3	3	1a
18	Prominence/ compatibility of surrounding uses/ amenities	2 Good	2 Good	4 Poor
19	Layout, parking, servicing, landscaping	3 Reasonable	N/A	N/A
20	Main occupiers and activities	Izzy Interiors, CCL, and S&W furniture.	None	No occupiers at the moment.
21	Vacancy	2 Low	1 Nil	4 High
22	Redevelopment/ Intensification	Surrounding residential uses and railway line prevent site expansion.	The warehouse in the north west corner has potential for future redevelopment.	The surrounding SINC prevents expansion.
23	If the site retains its current use, will it be occupied?	2 Likely	3 Hard to tell	1 Yes
24	Reasons	The site is well occupied by local services.	The rest of the site has come forward for mixed use development, and the warehouse could be subject to a similar application.	Will be high quality logistics units with good access to Heathrow.
25	For another employment use?	No	Yes	No
26	For alternative or mixed use?	No	Yes - may suit mixed use	No
27	Safeguard for existing use?	Yes	No	Yes
28	Any further advice			

CLUSTER APPRAISAL		Stanwell Road Estate	Mogden Sewage Treatment Works	Windmill Road Estate
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	Date	13 Nov 15	25 Nov 15	09 Nov 15
3	Site ID	**1012**	**1013**	**1014**
4	Site Name	**Stanwell Road Estate**	**Mogden Sewage Treatment Works**	**Windmill Road Estate**
5			No photos permitted	No photos permitted
6	Site Address	Great South Road, Bedfont, TW14 8ND	TW7 6ER	Brentford, TW8 9LY
7	Description	Local business site, mainly of car dealerships and car hire businesses.	Sewage treatment works	Large industrial warehouses - all vacant, in anticipation of residential redevelopment.
8	Site Area, ha	2.4	44.2	2.3
9	Type of Employment	Other	Other	General Industrial
10	Planning Policy	Hounslow Local Plan (2015) - CC4 Bedfont Green Conservation Area	Hounslow Local Plan (2015) - GB7 SINC	Hounslow Local Plan (2015) - Mixed Use Site Allocation 10
11	Planning History	No	No	2014 permission for demolition of industrial units and redevelopment for residential.
12	Floodplain	No	No	No
13	Regeneration/ Priority Area	No	No	No
14	Impacts of Existing Use on Neighbours/ Environment	Noise may impact residential area	Unpleasant smell may impact residential area	No
15	Ease of Access/ Proximity to Roads	4 Poor	3 Reasonable	2 Good
16	Suitability of Access	2 Good	3 Reasonable	3 Reasonable
17	PTAL	1a	1a	2
18	Prominence/ compatibility of surrounding uses/ amenities	4 Poor	4 Poor	3 Reasonable
19	Layout, parking, servicing, landscaping	3 Reasonable	2 Good	N/A
20	Main occupiers and activities	Enterprise cars, Thrifty Car Hire, Mitsubishi, Cordwallis Van Centre, Rygor Cars	Thames Water	None (was mainly in warehousing and office use).
21	Vacancy	1 Nil	1 Nil	5 100%
22	Redevelopment/ Intensification	This site could be intensified.	The surrounding SINC prevents site expansion	This site has a residential permission
23	If the site retains its current use, will it be occupied?	1 Yes	1 Yes	5 No
24	Reasons	Proximity to Heathrow and a major road.	Sewage works	The site is being redeveloped for residential use.
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	No
28	Any further advice			The Reynard Mills site has permission for residential redevelopment. Although the permission is yet to be implemented, the industrial buildings are now unoccupied and it is very unlikely the cluster will be used for employment use in the future.

CLUSTER APPRAISAL		Brentford Town Centre East	Barratts Great West Road (Wallis House) also known as the Great West Quarter	Churchill House
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	**Date**	18 November 2015	09 Nov 15	09 Nov 15
3	**Site ID**	**1015**	**1017**	**1018**
4	**Site Name**	**Brentford Town Centre East**	**Barratts Great West Road (Wallis House) also known as the Great West Quarter**	**Churchill House**
5				
6	**Site Address**	Brentford, TW8 0AA	Brentford, TW8 0GB	Brentford, TW8 9NB
7	**Description**	Small local offices and a distribution facility.	Modern residential and office site.	Small business and industrial site.
8	**Site Area, ha**	1.6	7.5	0.4
9	**Type of Employment**	Mixed B Uses (Office & Industrial)	Office	Mixed B Uses (Office & Industrial)
10	**Planning Policy**	Hounslow Local Plan (2015) - CC4 St Paul's and Brentford Conservation Area, Locally Listed Building (825)	Hounslow Local Plan (2015) - Mixed Use Site Allocation 12. Grade II Listed Building (281)	No
11	**Planning History**	Redevelopment of old pumping station into nursery.	No	No
12	**Floodplain**	Yes	No	No
13	**Regeneration/ Priority Area**	Hounslow Local Plan (2015) Archaeological Priority Areas	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	Noise may impact residential area
15	**Ease of Access/ Proximity to Roads**	2 Good	1 Excellent	2 Good
16	**Suitability of Access**	3 Reasonable	2 Good	3 Reasonable
17	**PTAL**	4	2	2
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	3 Reasonable	3 Reasonable
19	**Layout, parking, servicing, landscaping**	3 Reasonable	2 Good	4 Poor
20	**Main occupiers and activities**	Heidelberg, teapigs, Stylecreepsm RDL, and some other smaller offices.	Mostly local businesses and a car garage.	Mainly local businesses
21	**Vacancy**	1 Nil	2 Low	1 Nil
22	**Redevelopment/ Intensification**	The surrounding town centre uses and canal prevent expansion, although there may be scope for intensification of the site.	Expansion not possible due to surrounding residential uses and the M4. Redevelopment of United House is recommended.	The surrounding residential uses prevent expansion.
23	**If the site retains its current use, will it be occupied?**	3 Hard to tell	3 Hard to tell	1 Yes
24	**Reasons**	The area is currently undergoing regeneration, and many changes are planned.	United House may not gain investment for redevelopment.	No vacant units, and well used.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	Mixed use	No
27	**Safeguard for existing use?**	Yes	No	No
28	**Any further advice**			This is a very small and insignificant site.

CLUSTER APPRAISAL		Twickenham Trading Estate	Dairy Crest	Feltham Town Centre East (MOD)
1	**Assessor**	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch
2	**Date**	25 Nov 15	13 November 2015	13 November 2015
3	**Site ID**	**1021**	**1022**	**1023**
4	**Site Name**	**Twickenham Trading Estate**	**Dairy Crest**	**Feltham Town Centre East (MOD)**
5			No photos permitted	
6	**Site Address**	Rugby Road, TW1 1DQ	Middlesex, TW13 7ND	Feltham, TW13 7LW
7	**Description**	Large industrial and warehousing site, with a bus depot.	Single occupancy site for Dairy Crest.	MOD site, with some office and distribution units.
8	**Site Area, ha**	7.6	5.4	18.4
9	**Type of Employment**	General Industrial	Other	Mixed B Uses (Office & Industrial)
10	**Planning Policy**	Hounslow Local Plan (2015) - Mixed Use Site Allocation 30	Hounslow Local Plan (2015) - Metropolitan Green Belt	No
11	**Planning History**	No	No	COU from the RBS offices to residential
12	**Floodplain**	No	No	Yes
13	**Regeneration/ Priority Area**	No	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	Noise and traffic may impact residential area	No	No
15	**Ease of Access/ Proximity to Roads**	3 Reasonable	2 Good	2 Good
16	**Suitability of Access**	3 Reasonable	2 Good	2 Good
17	**PTAL**	1a	1b	3
18	**Prominence/ compatibility of surrounding uses/ amenities**	4 Poor	3 Reasonable	1 Excellent
19	**Layout, parking, servicing, landscaping**	3 Reasonable	2 Good	2 Good
20	**Main occupiers and activities**	Jewson, London United Busways, Howdens Joinery, Lock & Leave Self Storage, Eurotiles and Bathrooms	Dairy Crest	MOD site, RBS offices, DPP, UPS, Kerry Logistics and some small local industrial locations.
21	**Vacancy**	1 Nil	1 Nil	2 Low
22	**Redevelopment/ Intensification**	The surrounding residential uses prevent expansion.	The surrounding residential and Green Belt uses prevent expansion.	Browells Lane should be redeveloped. Surrounding residential uses prevent expansion.
23	**If the site retains its current use, will it be occupied?**	1 Yes	2 Likely	2 Likely
24	**Reasons**	Well used site	This site is well used for its current use.	There is much space for improved employment land on this site.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	Mixed use
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**			This site has a lot of opportunity. Employment use should be encouraged.

CLUSTER APPRAISAL		Kempton Park Water treatment	Bolney Way	Fullers Brewery
1	Assessor	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Andrew Lynch	Ashleigh Cook and Jonathan Ngige
2	Date	13 November 2015	13 November 2015	09 November 2015
3	Site ID	**1024**	**1025**	**1026**
4	Site Name	**Kempton Park Water treatment**	**Bolney Way**	**Fullers Brewery**
5		No photos permitted		
6	Site Address	Hanworth, TW13 6ST	Bolney Way, TW13 6DB	Chiswick Lane South, W4 2QB
7	Description	Water treatment plant	Small scale office, distribution units, and trade counters.	Single occupancy site for Fullers Brewery
8	Site Area, ha	62.4	2.6	2.1
9	Type of Employment	Other	Mixed B Uses (Office & Industrial)	Other
10	Planning Policy	Hounslow Local Plan (2015) - GB7 SINC & Metropolitan Green Belt	No	Hounslow Local Plan (2015) - CC4 Old Chiswick Conservation Area, GB5 Thames Policy Area
11	Planning History	No	No	No
12	Floodplain	No	No	Yes
13	Regeneration/ Priority Area	No	No	Hounslow Local Plan (2015) Archaeological Priority Areas
14	Impacts of Existing Use on Neighbours/ Environment	No	No	Noise and smell may impact residential area
15	Ease of Access/ Proximity to Roads	3 Reasonable	2 Good	2 Good
16	Suitability of Access	3 Reasonable	2 Good	3 Reasonable
17	PTAL	1b	2	1b
18	Prominence/ compatibility of surrounding uses/ amenities	3 Reasonable	2 Good	2 Good
19	Layout, parking, servicing, landscaping	2 Good	2 Good	3 Reasonable
20	Main occupiers and activities	Kempton Park water treatment works and nature reserve.	Dulux, Screwfix, Tool station.	Fullers Brewery.
21	Vacancy	1 Nil	2 Low	1 Nil
22	Redevelopment/ Intensification	Surrounding SINC and RAMSAR site prevent expansion.	Surrounding residential uses prevent expansion	The surrounding residential uses, conservation area, and local open space prevents expansion
23	If the site retains its current use, will it be occupied?	1 Yes	2 Likely	1 Yes
24	Reasons	This is a well established service.	This is a well occupied site.	The cluster is well used and is performing at a high capacity.
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	No
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice			

CLUSTER APPRAISAL		Worton Road	Hogarth Industrial Estate	Lawrence and Fairway Estate
1	Assessor	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	Date	18 November 2015	09 Nov 15	13 November 2015
3	Site ID	**1027**	**1028**	**1029**
4	Site Name	**Worton Road**	**Hogarth Industrial Estate**	**Lawrence and Fairway Estate**
5				
6	Site Address	Isleworth, TW7 6DS	Burlington Lane, W4 2TJ	Hounslow, TW4 6BU
7	Description	Small local industrial site	Much of site being redeveloped, vacant McCormack House office building remains.	Medium industrial and business site, some units of a poor quality, and others have seen recent high quality investment.
8	Site Area, ha	1.7	0.5	15.5
9	Type of Employment	General Industrial	Office	Mixed B Uses (Office & Industrial)
10	Planning Policy	No	Hounslow Local Plan (2015) - Mixed Use Site Allocation 4, CC4 Chiswick house Conservation Area	Hounslow Local Plan (2015) - ED2 SIL Preferred Industrial Locations
11	Planning History	No	Industrial units which are being redeveloped into residential units and some B1 floorspace.	No
12	Floodplain	No	Yes	Yes
13	Regeneration/ Priority Area	No	No	No
14	Impacts of Existing Use on Neighbours/ Environment	No	No	No
15	Ease of Access/ Proximity to Roads	3 Reasonable	2 Good	2 Good
16	Suitability of Access	2 Good	2 Good	2 Good
17	PTAL	2	1b	2
18	Prominence/ compatibility of surrounding uses/ amenities	2 Good	3 Reasonable	2 Good
19	Layout, parking, servicing, landscaping	4 Poor	N/A	3 Reasonable
20	Main occupiers and activities	Currie Self Storage, Travis Perkins, Toyota Garage, and Top Truck vehicle maintenance.	IMG (appears to be vacant)	Mainly consisting of a small selection of local services, International occupiers include Norbert Dentressangle.
21	Vacancy	1 Nil	4 High	2 Low
22	Redevelopment/ Intensification	The surrounding residential uses and local open space prevents expansion	IMG building redevelopment	Older office stock could be redeveloped, no scope for expansion due to Green Belt and SINC.
23	If the site retains its current use, will it be occupied?	2 Likely	4 Unlikely	2 Likely
24	Reasons	Well used local site	IMG has been vacant for 2 years - 1980s deign too dated.	Demand for warehouse/industrial
25	For another employment use?	No	No	No
26	For alternative or mixed use?	No	No	no
27	Safeguard for existing use?	Yes	Yes	Yes
28	Any further advice		There will be need for employment to complement the residential development - some small modern offices would be appropriate. The boundary has been adjusted to exclude the recently redeveloped residential units.	There has been improvements to this site, but other units remain as poor quality units needing improvement. This site has been separated from its original site boundary with no. 9, to reflect the reality of the employment land.

	CLUSTER APPRAISAL	Dukes Green offices	Central Park Estate	Vista Offices
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	**Date**	13 November 2015	13 November 2015	13 November 2015
3	**Site ID**	**1030**	**1031**	**1032**
4	**Site Name**	**Dukes Green offices**	**Central Park Estate**	**Vista Offices**
5				
6	**Site Address**	Feltham TW14 0LS	Central Park Estate, TW4 5DJ	Hounslow, TW4 6JQ
7	**Description**	Small scale office site with some government buildings.	Small scale business site, with an Immigration office.	Single office block of 300 offices over 10 floors.
8	**Site Area, ha**	2.2	3.7	0.5
9	**Type of Employment**	Office	Office	Office
10	**Planning Policy**	No	No	Hounslow Local Plan (2015) - Mixed Use Site Allocation 54
11	**Planning History**	No	No	COU from Offices to Residential
12	**Floodplain**	No	No	No
13	**Regeneration/ Priority Area**	No	Hounslow Local Plan (2015) Archaeological Priority Areas	No
14	**Impacts of Existing Use on Neighbours/ Environment**	No	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	2 Good
16	**Suitability of Access**	2 Good	2 Good	2 Good
17	**PTAL**	2	2	1a
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	2 Good	3 Reasonable
19	**Layout, parking, servicing, landscaping**	1 Excellent	1 Excellent	2 Good
20	**Main occupiers and activities**	West London Family Court and government buildings, as well as a gaming software manufacturer.	Hertz and the immigration services.	No clear sign of who occupies the building.
21	**Vacancy**	1 Nil	1 Nil	4 High
22	**Redevelopment/ Intensification**	Although land is green belt, expansion to the west may be possible.	Surrounding residential uses and Green Belt prevent site expansion.	Scope for intensification and improvement of offices, no scope for expansion due to residential uses.
23	**If the site retains its current use, will it be occupied?**	1 Yes	1 Yes	3 Hard to tell
24	**Reasons**	Well used by these office facilities.	Well used by all services.	Office units being converted to residential
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	Residential
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**			This is a large office development which is underutilised as some is being converted to residential. There is scope to improve and intensify the employment offer at this site.

	CLUSTER APPRAISAL	Commerce Road	Market Trading Estate	Hounslow Business Park
1	**Assessor**	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige	Ashleigh Cook and Jonathan Ngige
2	**Date**	13 November 2015	13 November 2015	13 November 2015
3	**Site ID**	**1033**	**1034**	**1035**
4	**Site Name**	**Commerce Road**	**Market Trading Estate**	**Hounslow Business Park**
5				
6	**Site Address**	Brentford, TW8 8LE	Southall UB2 5YG	Hounslow, TW3 3UD
7	**Description**	Small local industrial site with a bus depot.	Newly built site occupied by a variety of trade centres and local freight services.	Small local office site.
8	**Site Area, ha**	3.4	6.2	0.4
9	**Type of Employment**	General Industrial	General Industrial	Office
10	**Planning Policy**	Hounslow Local Plan (2015) - ED2 SIL Preferred Industrial Locations & Mixed use Allocation 21	Hounslow Local Plan (2015) - Cranford Archaeological Priority Area & Metropolitan Green Belt.	No
11	**Planning History**	Waterside regeneration - restoration, conversion and extension of retained buildings, providing residential, business, waterside restaurant/cafe, and waterside leisure. Also a few COU from Office to Residential.	No	No
12	**Floodplain**	No	No	No
13	**Regeneration/ Priority Area**	No	No	No
14	**Impacts of Existing Use on Neighbours/ Environment**	Traffic may have impact on residential area	No	No
15	**Ease of Access/ Proximity to Roads**	2 Good	2 Good	3 Reasonable
16	**Suitability of Access**	3 Reasonable	2 Good	2 Good
17	**PTAL**	2	1a	3
18	**Prominence/ compatibility of surrounding uses/ amenities**	2 Good	2 Good	2 Good
19	**Layout, parking, servicing, landscaping**	3 Reasonable	2 Good	2 Good
20	**Main occupiers and activities**	Brentford Business centre, Manderson House offices, and MP Brentford car services, as well as other small light industry.	Halfords autocentre, Tool station, Paul's fruit and veg limited.	The site is occupied by a number of local services including Adtec Europe Ltd and Mouseback Ltd.
21	**Vacancy**	1 Nil	1 Nil	1 Nil
22	**Redevelopment/ Intensification**	Surrounding residential uses and the railway line prevent expansion.	Although land is Green Belt, expansion to the south should be considered.	Expansion to the west onto Hanworth Road vacant site.
23	**If the site retains its current use, will it be occupied?**	2 Likely	2 Likely	2 Likely
24	**Reasons**	Local sites are needed in this area	This is a relatively new site which is well occupied.	This is a relatively new site which is well occupied.
25	**For another employment use?**	No	No	No
26	**For alternative or mixed use?**	No	No	No
27	**Safeguard for existing use?**	Yes	Yes	Yes
28	**Any further advice**	Boundary adjusted to reflect loss of some site area to residential and associated non-employment uses.	This is a newly developed site with a lot of surrounding vacant/underutilised land which presents an opportunity for development.	

SITES ASSESSMENTS – criteria scoring sheet

Criterion	Scoring scale	Explanation
Ease of Access / proximity to roads	Excellent to very poor	Excellent: direct access onto strategic road network or less than five minutes' drive from motorway junction Good: access not direct but well linked. Short distance on high quality local road Reasonable: longer distance on high quality local road to connect with strategic road network Poor: access to strategic road network via a number of different local roads. Not easy. Very poor: remote from strategic road network and no easy route by local roads
Suitability of access	Excellent to very poor	Excellent: junction onto road network suitable for type of employment use on site. Potential to accommodate additional traffic if site successful/expanded. Could have controlled access if needed or direct access onto roundabout. Good: junction onto road network suitable for current use, but may require upgrade, particularly if intensity of use increased. Reasonable: no signs of congestion due to substandard access but could be improved e.g. better visibility, feeder lane, scope for queuing. Poor: access not sufficient to accommodate volume of traffic using the site – could result in congestion in or off site through queuing at busy times. Very poor: poor formed access that requires upgrade to enable use by appropriate vehicles. Detracts from perception of site.
Prominence / compatibility of surrounding uses / amenities	Excellent to very poor	Excellent: well located for local amenities (in/edge of town location), good visibility for business occupiers, similar uses nearby or location large enough to have critical mass to standalone Good: local amenities nearby but relatively limited; other similar uses nearby, visible from road network. Does not have all the attributes of an excellent location though i.e. some element of compromise. Reasonable: local amenities can be reached by public transport easily, some similar uses around but area more mixed. Poor: limited visibility in commercial terms; few similar businesses in surrounding area but no sensitive neighbours.

Criterion	Scoring scale	Explanation
		Very poor: not compatible with surrounding uses. No visibility. Poorly placed to access local amenities.
Layout, parking, servicing & landscaping	Excellent to very poor	Excellent: well-maintained and laid out. Sufficient parking. Evidence of active management. Good: Sufficient parking. Tidy and well maintained but layout could be improved to maximise site. Reasonable: Parking in high demand and can result in some on kerb parking at busy times. Tidy site but would benefit from improvement to landscaping, surfacing etc. Poor: Insufficient parking or not sufficient controls on parking results in parking on streets and kerbs. Limited landscaping and poorly laid out. Very poor: not fully surfaced or properly maintained. Litter/flytipping. No formal parking and not enough space to meet required demand so can lead to congestion within site.
Vacancy	Nil to 100%	Nil: no vacancy Low: one or two vacant units or a limited amount of vacant floorspace. Middling: a number of vacant units / floorspace. High: the majority of units / floorspace are vacant 100%: whole site vacant
If the site retains its current use, will it be occupied?	Yes to no	Yes: well occupied and/or market signals indicate it will be in the future. Likely: occupied but some vacancies and/or market signals positive, but less certain over plan period. Some availability of stock in the local area. Hard to tell: a number of vacant units and/or market signals neutral. A number of units available in the local area. Unlikely: high vacancy and/or negative market signals. Lots of stock availability in the local area. No: developer interest as evidenced by extant permission or live application for another use.

APPENDIX B SECTOR TO LAND USE

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. As the starting point for this translation we recommend a method developed by Roger Tym & Partners (now PBA) over a series of employment land reviews and tested in a large-scale study of the Yorkshire and Humber region in 2010[1]. 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 space and offices respectively. The names and numbers that identify each activity sector are from the UK Standard Classification of Economic Activities 2007 (SIC 2007)[2].

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

[2] http://www.businessballs.com/freespecialresources/SIC-2007-explanation.pdf

Table 1 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 (nec)
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 2 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. 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 that individual local authority areas.

12. The Yorkshire and Humber report provides further information and advice on sector-to-land-use relationships.

Annex – Sector to land use

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Food, Drink & Tobacco	10110 : Processing and preserving of meat
Manufacturing	Food, Drink & Tobacco	10120 : Processing and preserving of poultry meat
Manufacturing	Food, Drink & Tobacco	10130 : Production of meat and poultry meat products
Manufacturing	Food, Drink & Tobacco	10200 : Processing and preserving of fish, crustaceans and molluscs
Manufacturing	Food, Drink & Tobacco	10310 : Processing and preserving of potatoes
Manufacturing	Food, Drink & Tobacco	10320 : Manufacture of fruit and vegetable juice
Manufacturing	Food, Drink & Tobacco	10390 : Other processing and preserving of fruit and vegetables
Manufacturing	Food, Drink & Tobacco	10410 : Manufacture of oils and fats
Manufacturing	Food, Drink & Tobacco	10420 : Manufacture of margarine and similar edible fats
Manufacturing	Food, Drink & Tobacco	10511 : Liquid milk and cream production
Manufacturing	Food, Drink & Tobacco	10512 : Butter and cheese production
Manufacturing	Food, Drink & Tobacco	10519 : Manufacture of milk products (other than liquid milk and cream,butter, cheese) nec
Manufacturing	Food, Drink & Tobacco	10520 : Manufacture of ice cream
Manufacturing	Food, Drink & Tobacco	10611 : Grain milling
Manufacturing	Food, Drink & Tobacco	10612 : Manufacture of breakfast cereals and cereals-based foods
Manufacturing	Food, Drink & Tobacco	10620 : Manufacture of starches and starch products
Manufacturing	Food, Drink & Tobacco	10710 : Manufacture of bread; manufacture of fresh pastry goods and cakes
Manufacturing	Food, Drink & Tobacco	10720 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
Manufacturing	Food, Drink & Tobacco	10730 : Manufacture of macaroni, noodles, couscous and similar farinaceous products
Manufacturing	Food, Drink & Tobacco	10810 : Manufacture of sugar
Manufacturing	Food, Drink & Tobacco	10821 : Manufacture of cocoa, and chocolate confectionery
Manufacturing	Food, Drink & Tobacco	10822 : Manufacture of sugar confectionery
Manufacturing	Food, Drink & Tobacco	10831 : Tea processing
Manufacturing	Food, Drink & Tobacco	10832 : Production of coffee and coffee substitutes
Manufacturing	Food, Drink & Tobacco	10840 : Manufacture of condiments and seasonings
Manufacturing	Food, Drink & Tobacco	10850 : Manufacture of prepared meals and dishes
Manufacturing	Food, Drink & Tobacco	10860 : Manufacture of homogenised food preparations and dietetic food
Manufacturing	Food, Drink & Tobacco	10890 : Manufacture of other food products nec
Manufacturing	Food, Drink & Tobacco	10910 : Manufacture of prepared feeds for farm animals
Manufacturing	Food, Drink & Tobacco	10920 : Manufacture of prepared pet foods
Manufacturing	Food, Drink & Tobacco	11010 : Distilling, rectifying and blending of spirits
Manufacturing	Food, Drink & Tobacco	11020 : Manufacture of wine from grape
Manufacturing	Food, Drink & Tobacco	11030 : Manufacture of cider and other fruit wines
Manufacturing	Food, Drink & Tobacco	11040 : Manufacture of other non-distilled fermented beverages
Manufacturing	Food, Drink & Tobacco	11050 : Manufacture of beer
Manufacturing	Food, Drink & Tobacco	11060 : Manufacture of malt
Manufacturing	Food, Drink & Tobacco	11070 : Manufacture of soft drinks; production of mineral waters and other bottled waters
Manufacturing	Food, Drink & Tobacco	12000 : Manufacture of tobacco products
Manufacturing	Textiles & Clothing	13100 : Preparation and spinning of textile fibres
Manufacturing	Textiles & Clothing	13200 : Weaving of textiles
Manufacturing	Textiles & Clothing	13300 : Finishing of textiles
Manufacturing	Textiles & Clothing	13910 : Manufacture of knitted and crocheted fabrics
Manufacturing	Textiles & Clothing	13921 : Manufacture of soft furnishings
Manufacturing	Textiles & Clothing	13922 : Manufacture of canvas goods, sacks etc
Manufacturing	Textiles & Clothing	13923 : Manufacture of household textiles (other than soft furnishings of 13921)
Manufacturing	Textiles & Clothing	13931 : Manufacture of woven or tufted carpets and rugs
Manufacturing	Textiles & Clothing	13939 : Manufacture of carpets and rugs (other than woven or tufted) nec
Manufacturing	Textiles & Clothing	13940 : Manufacture of cordage, rope, twine and netting
Manufacturing	Textiles & Clothing	13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel
Manufacturing	Textiles & Clothing	13960 : Manufacture of other technical and industrial textiles
Manufacturing	Textiles & Clothing	13990 : Manufacture of other textiles nec
Manufacturing	Textiles & Clothing	14110 : Manufacture of leather clothes
Manufacturing	Textiles & Clothing	14120 : Manufacture of workwear
Manufacturing	Textiles & Clothing	14131 : Manufacture of men's outerwear, other than leather clothes and workwear
Manufacturing	Textiles & Clothing	14132 : Manufacture of women's outerwear, other than leather clothes and workwear
Manufacturing	Textiles & Clothing	14141 : Manufacture of men's underwear
Manufacturing	Textiles & Clothing	14142 : Manufacture of women's underwear
Manufacturing	Textiles & Clothing	14190 : Manufacture of other wearing apparel and accessories
Manufacturing	Textiles & Clothing	14200 : Manufacture of articles of fur
Manufacturing	Textiles & Clothing	14310 : Manufacture of knitted and crocheted hosiery
Manufacturing	Textiles & Clothing	14390 : Manufacture of other knitted and crocheted apparel
Manufacturing	Textiles & Clothing	15110 : Tanning and dressing of leather; dressing and dyeing of fur
Manufacturing	Textiles & Clothing	15120 : Manufacture of luggage, handbags and the like, saddlery and harness
Manufacturing	Textiles & Clothing	15200 : Manufacture of footwear
Manufacturing	Wood & Paper	16100 : Sawmilling and planing of wood
Manufacturing	Wood & Paper	16210 : Manufacture of veneer sheets and wood-based panels
Manufacturing	Wood & Paper	16220 : Manufacture of assembled parquet floors
Manufacturing	Wood & Paper	16230 : Manufacture of other builders' carpentry and joinery
Manufacturing	Wood & Paper	16240 : Manufacture of wooden containers
Manufacturing	Wood & Paper	16290 : Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
Manufacturing	Wood & Paper	17110 : Manufacture of pulp
Manufacturing	Wood & Paper	17120 : Manufacture of paper and paperboard
Manufacturing	Wood & Paper	17211 : Manufacture of corrugated paper and paperboard; manufacture of sacks and bags of paper
Manufacturing	Wood & Paper	17219 : Manufacture of paper and paperboard containers other than sacks and bags
Manufacturing	Wood & Paper	17220 : Manufacture of household and sanitary goods and of toilet requisites
Manufacturing	Wood & Paper	17230 : Manufacture of paper stationery
Manufacturing	Wood & Paper	17240 : Manufacture of wallpaper
Manufacturing	Wood & Paper	17290 : Manufacture of other articles of paper and paperboard
Manufacturing	Printing and Reproduction of Recorded Media	18110 : Printing of newspapers
Manufacturing	Printing and Reproduction of Recorded Media	18121 : Manufacture of printed labels
Manufacturing	Printing and Reproduction of Recorded Media	18129 : Printing (other than printing of newspaper s and printing on labels and tags) nec
Manufacturing	Printing and Reproduction of Recorded Media	18130 : Pre-press and pre-media services
Manufacturing	Printing and Reproduction of Recorded Media	18140 : Binding and related services
Manufacturing	Printing and Reproduction of Recorded Media	18201 : Reproduction of sound recording
Manufacturing	Printing and Reproduction of Recorded Media	18202 : Reproduction of video recording
Manufacturing	Printing and Reproduction of Recorded Media	18203 : Reproduction of computer media
Manufacturing	Fuel Refining	19100 : Manufacture of coke oven products
Manufacturing	Fuel Refining	19201 : Mineral oil refining
Manufacturing	Fuel Refining	19209 : Other treatment of petroleum products (excluding mineral oil refining petrochemicals manufacture)
Manufacturing	Chemicals	20110 : Manufacture of industrial gases
Manufacturing	Chemicals	20120 : Manufacture of dyes and pigments
Manufacturing	Chemicals	20130 : Manufacture of other inorganic basic chemicals
Manufacturing	Chemicals	20140 : Manufacture of other organic basic chemicals
Manufacturing	Chemicals	20150 : Manufacture of fertilisers and nitrogen compounds
Manufacturing	Chemicals	20160 : Manufacture of plastics in primary forms
Manufacturing	Chemicals	20170 : Manufacture of synthetic rubber in primary forms
Manufacturing	Chemicals	20200 : Manufacture of pesticides and other agrochemical products
Manufacturing	Chemicals	20301 : Manufacture of paints, varnishes and similar coatings, mastics and sealants
Manufacturing	Chemicals	20302 : Manufacture of printing ink
Manufacturing	Chemicals	20411 : Manufacture of soap and detergents
Manufacturing	Chemicals	20412 : Manufacture of cleaning and polishing preparations
Manufacturing	Chemicals	20420 : Manufacture of perfumes and toilet preparations
Manufacturing	Chemicals	20510 : Manufacture of explosives
Manufacturing	Chemicals	20520 : Manufacture of glues
Manufacturing	Chemicals	20530 : Manufacture of essential oils
Manufacturing	Chemicals	20590 : Manufacture of other chemical products nec
Manufacturing	Chemicals	20600 : Manufacture of man-made fibres
Manufacturing	Pharmaceuticals	21100 : Manufacture of basic pharmaceutical products

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Pharmaceuticals	21200 : Manufacture of pharmaceutical preparations
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22110 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22190 : Manufacture of other rubber products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22210 : Manufacture of plastic plates, sheets, tubes and profiles
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22220 : Manufacture of plastic packing goods
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22230 : Manufacture of builders□ ware of plastic
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22290 : Manufacture of other plastic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23110 : Manufacture of flat glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23120 : Shaping and processing of flat glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23130 : Manufacture of hollow glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23140 : Manufacture of glass fibres
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23190 : Manufacture and processing of other glass, including technical glassware
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23200 : Manufacture of refractory products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23310 : Manufacture of ceramic tiles a nd flags
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23320 : Manufacture of bricks, tiles a nd construction products, in baked clay
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23410 : Manufacture of ceramic household and ornamental articles
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23420 : Manufacture of ceramic sanitary fixtures
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23430 : Manufacture of ceramic insulating fittings
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23440 : Manufacture of other technical ceramic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23490 : Manufacture of other ceramic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23510 : Manufacture of cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23520 : Manufacture of lime and plaster
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23610 : Manufacture of concrete products for construction purposes
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23620 : Manufacture of plaster products for construction purposes
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23630 : Manufacture of ready-mixed concrete
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23640 : Manufacture of mortars
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23650 : Manufacture of fibre cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23690 : Manufacture of other articles of concrete plaster and cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23700 : Cutting, shaping and finishing of stone
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23910 : Production of abrasive products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23990 : Manufacture of other non-metallic mineral products
Manufacturing	Metal products	24100 : Manufacture of basic iron and steel and of ferro-alloys
Manufacturing	Metal products	24200 : Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
Manufacturing	Metal products	24310 : Cold drawing of bars
Manufacturing	Metal products	24320 : Cold rolling of narrow strip
Manufacturing	Metal products	24330 : Cold forming or folding
Manufacturing	Metal products	24340 : Cold drawing of wire
Manufacturing	Metal products	24410 : Precious metals production
Manufacturing	Metal products	24420 : Aluminium production
Manufacturing	Metal products	24430 : Lead, zinc and tin production
Manufacturing	Metal products	24440 : Copper production
Manufacturing	Metal products	24450 : Other non-ferrous metal production
Manufacturing	Metal products	24460 : Processing of nuclear fuel
Manufacturing	Metal products	24510 : Casting of iron
Manufacturing	Metal products	24520 : Casting of steel
Manufacturing	Metal products	24530 : Casting of light metals
Manufacturing	Metal products	24540 : Casting of other non-ferrous metals
Manufacturing	Metal products	25110 : Manufacture of metal structures and parts of structures
Manufacturing	Metal products	25120 : Manufacture of doors and windows of metals
Manufacturing	Metal products	25210 : Manufacture of central heating radiators and boilers
Manufacturing	Metal products	25290 : Manufacture of other tanks, reservoirs and containers of metal
Manufacturing	Metal products	25300 : Manufacture of steam generators, except central heating hot water boilers
Manufacturing	Metal products	25400 : Manufacture of weapons and ammunition
Manufacturing	Metal products	25500 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy
Manufacturing	Metal products	25610 : Treatment and coating of metals
Manufacturing	Metal products	25620 : Machining
Manufacturing	Metal products	25710 : Manufacture of cutlery
Manufacturing	Metal products	25720 : Manufacture of locks and hinges
Manufacturing	Metal products	25730 : Manufacture of tools
Manufacturing	Metal products	25910 : Manufacture of steel drums and similar containers
Manufacturing	Metal products	25920 : Manufacture of light metal packaging
Manufacturing	Metal products	25930 : Manufacture of wire products, chain and springs
Manufacturing	Metal products	25940 : Manufacture of fasteners and screw machine products
Manufacturing	Metal products	25990 : Manufacture of other fabricated metal products nec
Manufacturing	Computer & Electronic Products	26110 : Manufacture of electronic components
Manufacturing	Computer & Electronic Products	26120 : Manufacture of loaded electronic boards
Manufacturing	Computer & Electronic Products	26200 : Manufacture of computers and peripheral equipment
Manufacturing	Computer & Electronic Products	26301 : Manufacture of telegraph and telephone apparatus and equipment
Manufacturing	Computer & Electronic Products	26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment
Manufacturing	Computer & Electronic	26400 : Manufacture of consumer electronics
Manufacturing	Computer & Electronic	26511 : Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment navigation, except industrial process control equipment
Manufacturing	Computer & Electronic	26512 : Manufacture of electronic industrial process control equipment
Manufacturing	Computer & Electronic	26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment
Manufacturing	Computer & Electronic Products	26514 : Manufacture of non-electronic industrial process control equipment
Manufacturing	Computer & Electronic Products	26520 : Manufacture of watches and clocks
Manufacturing	Computer & Electronic Products	26600 : Manufacture of irradiation, electromedical and electrottherapeutic equipment
Manufacturing	Computer & Electronic Products	26701 : Manufacture of optical precision instruments
Manufacturing	Computer & Electronic Products	26702 : Manufacture of photographic and cinematographic equipment
Manufacturing	Computer & Electronic Products	26800 : Manufacture of magnetic and optical media
Manufacturing	Computer & Electronic Products	27110 : Manufacture of electric motors, generators and transformers
Manufacturing	Computer & Electronic Products	27120 : Manufacture of electricity distribution and control apparatus
Manufacturing	Computer & Electronic Products	27200 : Manufacture of batteries and accumulators
Manufacturing	Computer & Electronic Products	27310 : Manufacture of fibre optic cables
Manufacturing	Computer & Electronic Products	27320 : Manufacture of other electronic and electric wires and cables
Manufacturing	Computer & Electronic Products	27330 : Manufacture of wiring devices
Manufacturing	Computer & Electronic Products	27400 : Manufacture of electric lighting equipment
Manufacturing	Computer & Electronic Products	27510 : Manufacture of electric domestic appliances
Manufacturing	Computer & Electronic Products	27520 : Manufacture of non-electric domestic appliances
Manufacturing	Computer & Electronic Products	27900 : Manufacture of other electrical equipment
Manufacturing	Machinery & Equipment	28110 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
Manufacturing	Machinery & Equipment	28120 : Manufacture of fluid power equipment
Manufacturing	Machinery & Equipment	28131 : Manufacture of pumps
Manufacturing	Machinery & Equipment	28132 : Manufacture of compressors
Manufacturing	Machinery & Equipment	28140 : Manufacture of other taps and valves
Manufacturing	Machinery & Equipment	28150 : Manufacture of bearings, gears, gearing and driving elements
Manufacturing	Machinery & Equipment	28210 : Manufacture of ovens, furnaces and furnace burners
Manufacturing	Machinery & Equipment	28220 : Manufacture of lifting and handling equipment
Manufacturing	Machinery & Equipment	28230 : Manufacture of office machinery and equipment (except computers and peripheral equipment)
Manufacturing	Machinery & Equipment	28240 : Manufacture of power-driven hand tools
Manufacturing	Machinery & Equipment	28250 : Manufacture of non-domestic cooling and ventilation equipment
Manufacturing	Machinery & Equipment	28290 : Manufacture of other general-purpose machinery nec
Manufacturing	Machinery & Equipment	28301 : Manufacture of agricultural tractors
Manufacturing	Machinery & Equipment	28302 : Manufacture of agricultural and forestry machinery (other than a gricultural tractors)
Manufacturing	Machinery & Equipment	28410 : Manufacture of metal forming machinery
Manufacturing	Machinery & Equipment	28490 : Manufacture of other machine tools

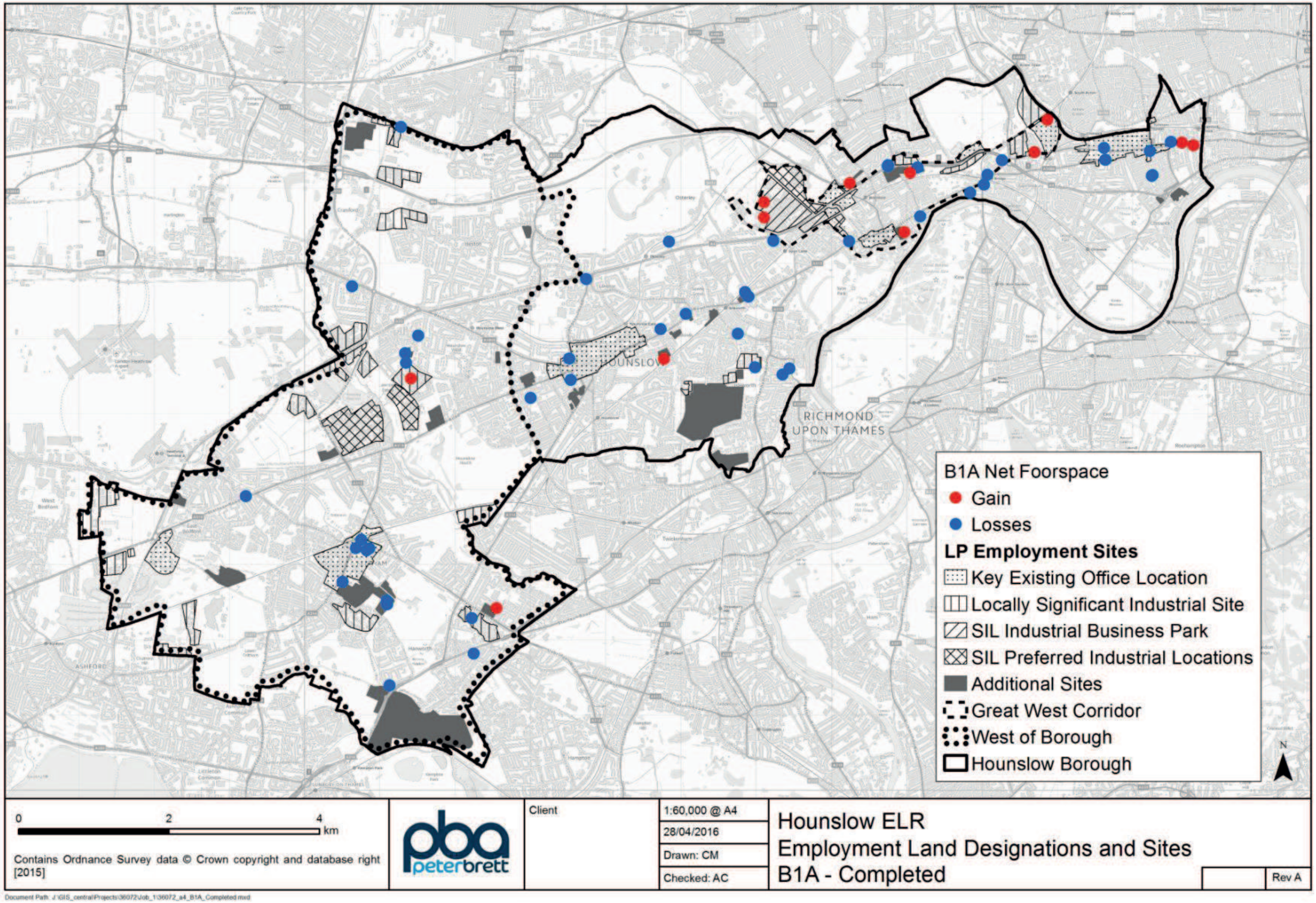
Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Machinery & Equipment	28910 : Manufacture of machinery for metallurgy
Manufacturing	Machinery & Equipment	28921 : Manufacture of machinery for mining
Manufacturing	Machinery & Equipment	28922 : Manufacture of earthmoving equipment
Manufacturing	Machinery & Equipment	28923 : Manufacture of equipment for concrete crushing and screening roadworks
Manufacturing	Machinery & Equipment	28930 : Manufacture of machinery for food, beverage and tobacco processing
Manufacturing	Machinery & Equipment	28940 : Manufacture of machinery for textile, apparel and leather production
Manufacturing	Machinery & Equipment	28950 : Manufacture of machinery for paper and paperboard production
Manufacturing	Machinery & Equipment	28960 : Manufacture of plastics and rubber machinery
Manufacturing	Machinery & Equipment	28990 : Manufacture of other special-purpose machinery nec
Manufacturing	Machinery & Equipment	29100 : Manufacture of motor vehicles
Manufacturing	Machinery & Equipment	29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)
Manufacturing	Machinery & Equipment	29202 : Manufacture of trailers and semi-trailers
Manufacturing	Machinery & Equipment	29203 : Manufacture of caravans
Manufacturing	Machinery & Equipment	29310 : Manufacture of electrical and electronic equipment for motor vehicles
Manufacturing	Machinery & Equipment	29320 : Manufacture of other parts and accessories for motor vehicles
Manufacturing	Machinery & Equipment	30110 : Building of ships and floating structures
Manufacturing	Machinery & Equipment	30120 : Building of pleasure and sporting boats
Manufacturing	Machinery & Equipment	30200 : Manufacture of railway locomotives and rolling stock
Manufacturing	Machinery & Equipment	30300 : Manufacture of air and spacecraft and related machinery
Manufacturing	Machinery & Equipment	30400 : Manufacture of military fighting vehicles
Manufacturing	Machinery & Equipment	30910 : Manufacture of motorcycles
Manufacturing	Machinery & Equipment	30920 : Manufacture of bicycles and invalid carriages
Manufacturing	Machinery & Equipment	30990 : Manufacture of other transport equipment nec
Manufacturing	Other Manufacturing	31010 : Manufacture of office and shop furniture
Manufacturing	Other Manufacturing	31020 : Manufacture of kitchen furniture
Manufacturing	Other Manufacturing	31030 : Manufacture of mattresses
Manufacturing	Other Manufacturing	31090 : Manufacture of other furniture
Manufacturing	Other Manufacturing	32110 : Striking of coins
Manufacturing	Other Manufacturing	32120 : Manufacture of jewellery and related articles
Manufacturing	Other Manufacturing	32130 : Manufacture of imitation jewellery and related articles
Manufacturing	Other Manufacturing	32200 : Manufacture of musical instruments
Manufacturing	Other Manufacturing	32300 : Manufacture of sports goods
Manufacturing	Other Manufacturing	32401 : Manufacture of professional and arcade games and toys
Manufacturing	Other Manufacturing	32409 : Manufacture of games and toys (other than professional and arcade games and toys)
Manufacturing	Other Manufacturing	32500 : Manufacture of medical and dental instruments and supplies
Manufacturing	Other Manufacturing	32910 : Manufacture of brooms and brushes
Manufacturing	Other Manufacturing	32990 : Other manufacturing nec
Manufacturing	Other Manufacturing	33110 : Repair of fabricated metal products
Manufacturing	Other Manufacturing	33120 : Repair of machinery
Manufacturing	Other Manufacturing	33130 : Repair of electronic and optical equipment
Manufacturing	Other Manufacturing	33140 : Repair of electrical equipment
Manufacturing	Other Manufacturing	33150 : Repair and maintenance of ships and boats
Manufacturing	Other Manufacturing	33160 : Repair and maintenance of aircraft and spacecraft
Manufacturing	Other Manufacturing	33170 : Repair and maintenance of other transport equipment
Manufacturing	Other Manufacturing	33190 : Repair of other equipment
Manufacturing	Other Manufacturing	33200 : Installation of industrial machinery and equipment
Other industrial	Utilities	37000 : Sewerage
Other industrial	Utilities	38110 : Collection of non-hazardous waste
Other industrial	Utilities	38120 : Collection of hazardous waste
Other industrial	Utilities	38210 : Treatment and disposal of non-hazardous waste
Other industrial	Utilities	38220 : Treatment and disposal of hazardous waste
Other industrial	Utilities	38310 : Dismantling of wrecks
Other industrial	Utilities	38320 : Recovery of sorted materials
Other industrial	Specialised Construction Activities	43210 : Electrical installation
Other industrial	Specialised Construction Activities	43220 : Plumbing, heat and air-conditioning installation
Other industrial	Specialised Construction Activities	43290 : Other construction installation
Other industrial	Specialised Construction Activities	43310 : Plastering
Other industrial	Specialised Construction Activities	43320 : Joinery installation
Other industrial	Specialised Construction Activities	43330 : Floor and wall covering
Other industrial	Specialised Construction Activities	43341 : Painting
Other industrial	Specialised Construction Activities	43342 : Glazing
Other industrial	Specialised Construction Activities	43390 : Other building completion and finishing
Other industrial	Specialised Construction Activities	43910 : Roofing activities
Other industrial	Specialised Construction Activities	43991 : Scaffold erection
Other industrial	Specialised Construction Activities	43999 : Specialised construction activities (other than scaffold erection)
Other industrial	Wholesale	45200 : Maintenance and repair of motor vehicles
Other industrial	Wholesale	45400 : Sale, maintenance and repair of motorcycles and related parts and accessories
Warehousing	Wholesale	46110 : Agents involved in the sale of agricultural raw materials, live animals, texti and semi-finished goods
Warehousing	Wholesale	46120 : Agentsinvolved in the sale of fuels, ores, metals and industrial chemicals
Warehousing	Wholesale	46130 : Agentsinvolved in the sale of timber and building materials
Warehousing	Wholesale	46140 : Agentsinvolved in the sale of machinery, industrial equipment, ships and aircraft
Warehousing	Wholesale	46150 : Agentsinvolved in the sale of furniture, household goods, hardware and ironmongery
Warehousing	Wholesale	46160 : Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
Warehousing	Wholesale	46170 : Agents involved in the sale of food, beverages and tobacco
Warehousing	Wholesale	46180 : Agents specialised in the sale of other particular products
Warehousing	Wholesale	46190 : Agents involved in the sale of a variety of goods
Warehousing	Wholesale	46210 : Wholesale of grain, unmanufactured tobacco, seeds and animal feeds
Warehousing	Wholesale	46220 : Wholesale of flowers and plants
Warehousing	Wholesale	46230 : Wholesale of live animals
Warehousing	Wholesale	46240 : Wholesale of hides, skins and leather
Warehousing	Wholesale	46310 : Wholesale of fruit and vegetables
Warehousing	Wholesale	46320 : Wholesale of meat and meat products
Warehousing	Wholesale	46330 : Wholesale of dairy products, eggs and edible oils and fats
Warehousing	Wholesale	46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks
Warehousing	Wholesale	46342 : Wholesale of wine, beer, spirits and other alcoholic beverages
Warehousing	Wholesale	46350 : Wholesale of tobacco products
Warehousing	Wholesale	46360 : Wholesale of sugar and chocolate and sugar confectionery
Warehousing	Wholesale	46370 : Wholesale of coffee, tea, cocoa and spices
Warehousing	Wholesale	46380 : Wholesale of other food, including fish, crustaceans and molluscs
Warehousing	Wholesale	46390 : Non-specialised wholesale of food, beverages and tobacco
Warehousing	Wholesale	46410 : Wholesale of textiles
Warehousing	Wholesale	46420 : Wholesale of clothing and footwear
Warehousing	Wholesale	46431 : Wholesale of gramophone records, audio tapes, compact discs and video tapes and of the equipment on which these are played)
Warehousing	Wholesale	46439 : Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes,compact discs and video tapes and the equipment on which these are played)
Warehousing	Wholesale	46440 : Wholesale of china and glassware and cleaning materials
Warehousing	Wholesale	46450 : Wholesale of perfume and cosmetics
Warehousing	Wholesale	46460 : Wholesale of pharmaceutical goods
Warehousing	Wholesale	46470 : Wholesale of furniture, carpets and lighting equipment
Warehousing	Wholesale	46480 : Wholesale of watches and jewellery
Warehousing	Wholesale	46491 : Wholesale of musical instruments
Warehousing	Wholesale	46499 : Wholesale of household goods (other than musical instruments) nec
Warehousing	Wholesale	46510 : Wholesale of computers, computer peripheral equipment and software
Warehousing	Wholesale	46520 : Wholesale of electronic and telecommunications equipment and parts
Warehousing	Wholesale	46610 : Wholesale of agricultural machinery, equipment and supplies
Warehousing	Wholesale	46620 : Wholesale of machine tools
Warehousing	Wholesale	46630 : Wholesale of mining, construction and civil engineering machinery
Warehousing	Wholesale	46640 : Wholesale of machinery for the textile industry and of sewing and knitting machines

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Warehousing	Wholesale	46650 : Wholesale of office furniture
Warehousing	Wholesale	46660 : Wholesale of other office machinery and equipment
Warehousing	Wholesale	46690 : Wholesale of other machinery and equipment
Warehousing	Wholesale	46711 : Wholes ale of petroleum and petroleum products
Warehousing	Wholesale	46719 : Wholes ale of fuels and related products (other than petroleum and petroleum products)
Warehousing	Wholesale	46720 : Wholesale of metals and metal ores
Warehousing	Wholesale	46730 : Wholesale of wood, construction materials and sanitary equipment
Warehousing	Wholesale	46740 : Wholesale of hardware, plumbing and heating equipment and supplies
Warehousing	Wholesale	46750 : Wholesale of chemical products
Warehousing	Wholesale	46760 : Wholesale of other intermediate products
Warehousing	Wholesale	46770 : Wholesale of waste and scrap
Warehousing	Wholesale	46900 : Non-specialised wholesale trade
Warehousing	Land Transport, Storage & Post	49410 : Freight transport by road
Warehousing	Land Transport, Storage & Post	49420 : Removal services
Warehousing	Land Transport, Storage & Post	52101 : Operation of warehousing and storage facilities for water transport activities of division 50
Warehousing	Land Transport, Storage & Post	52102 : Operation of warehousing and storage facilities for air transport activities of division 51
Warehousing	Land Transport, Storage & Post	52103 : Operation of warehousing and storage facilities for land transport activities of division 49
Warehousing	Land Transport, Storage & Post	52211 : Operation of rail freight terminals
Warehousing	Land Transport, Storage & Post	52212 : Operation of rail passenger facilities at railway stations
Warehousing	Land Transport, Storage & Post	52213 : Operation of bus and coach passenger facilities at bus and coach stations
Warehousing	Land Transport, Storage & Post	52219 : Other service activities incidental to land transportation, nec (not including operation of rail freight terminals, passenger facilities at railway ies at railway stations or passenger facilities at bus and coachstations or passenger facilities at railway stations or passenger facilities at bus and coach stations)
Warehousing	Land Transport, Storage & Post	52241 : Cargo handling for water transport activities of division 50
Warehousing	Land Transport, Storage & Post	52242 : Cargo handling for air transport activities of division 51
Warehousing	Land Transport, Storage & Post	52243 : Cargo handling for land transport activities of division 49
Warehousing	Land Transport, Storage & Post	53100 : Postal activities under universal service obligation
Warehousing	Land Transport, Storage & Post	53201 : Licensed Carriers
Warehousing	Land Transport, Storage & Post	53202 : Unlicensed Carriers
Office	Media Activities	58110 : Book publishing
Office	Media Activities	58120 : Publishing of directories and mailing lists
Office	Media Activities	58130 : Publishing of newspapers
Office	Media Activities	58141 : Publishing of learned journals
Office	Media Activities	58142 : Publishing of consumer, business and professional journals and periodicals
Office	Media Activities	58190 : Other publishing activities
Office	Media Activities	59111 : Motion picture production activities
Office	Media Activities	59112 : Video production activities
Office	Media Activities	59113 : Television programme production activities
Office	Media Activities	59120 : Motion picture, video and television programme post-production activities
Office	Media Activities	59131 : Motion picture distribution activities
Office	Media Activities	59132 : Video distribution activities
Office	Media Activities	59133 : Television programme distribution activities
Office	Media Activities	59200 : Sound recording and music publishing activities
Office	Media Activities	60100 : Radio broadcasting
Office	Media Activities	60200 : Television programming and broadcasting activities
Office	Computing & Information Services	62011 : Ready-made interactive leisure and entertainment software development
Office	Computing & Information Services	62012 : Business and domestic software development
Office	Computing & Information Services	62020 : Computer consultancy activities
Office	Computing & Information Services	62030 : Computer facilities management activities
Office	Computing & Information Services	62090 : Other information technology and computer service activities
Office	Computing & Information Services	63110 : Data processing, hosting and related activities
Office	Computing & Information Services	63120 : Web portals
Office	Computing & Information Services	63910 : News agency activities
Office	Computing & Information Services	63990 : Other information service activities nec
Office	Finance	64110 : Central banking
Office	Finance	64191 : Banks
Office	Finance	64192 : Building societies
Office	Finance	64201 : Activities of agricultural holding companies
Office	Finance	64202 : Activities of production holding companies
Office	Finance	64203 : Activities of construction holding companies
Office	Finance	64204 : Activities of distribution holding companies
Office	Finance	64205 : Activities of financial services holding companies
Office	Finance	64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c
Office	Finance	64301 : Activities of investment trusts
Office	Finance	64302 : Activities of unit trusts
Office	Finance	64303 : Activities of venture and development capital companies
Office	Finance	64304 : Activities of open-ended investment companies
Office	Finance	64305 : Activities of property unit trusts
Office	Finance	64306 : Activities of real estate investment trusts
Office	Finance	64910 : Financial leasing
Office	Finance	64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
Office	Finance	64922 : Activities of mortgage finance companies
Office	Finance	64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.
Office	Finance	64991 : Security dealing on own account
Office	Finance	64992 : Factoring
Office	Finance	64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.
Office	Insurance & Pensions	65110 : Life insurance
Office	Insurance & Pensions	65120 : Non-life insurance
Office	Insurance & Pensions	65201 : Life reinsurance
Office	Insurance & Pensions	65202 : Non-life reinsurance
Office	Insurance & Pensions	65300 : Pension funding
Office	Finance	66110 : Administration of financial markets
Office	Finance	66120 : Security and commodity contracts brokerage
Office	Finance	66190 : Other activities auxiliary to financial services, except insurance and pension funding
Office	Finance	66210 : Risk and damage evaluation
Office	Finance	66220 : Activities ofinsurance agents and brokers
Office	Finance	66290 : Other activities auxiliary to insurance and pension funding
Office	Finance	66300 : Fund management activities
Office	Real Estate	68100 : Buying and selling of own real estate
Office	Real Estate	68201 : Renting and operating of Housing Association real estate
Office	Real Estate	68202 : Letting and operating of conference and exhibition centres
Office	Real Estate	68209 : Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c.
Office	Real Estate	68310 : Real estate agencies
Office	Real Estate	68320 : Management of real estate on a fee or contract basis
Office	Professional services	69101 : Barristers at law
Office	Professional services	69102 : Solicitors
Office	Professional services	69109 : Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec
Office	Professional services	69201 : Accounting, and auditing activities
Office	Professional services	69202 : Bookkeeping activities
Office	Professional services	69203 : Tax consultancy
Office	Professional services	70100 : Activities of head offices
Office	Professional services	70210 : Public relations and communication activities
Office	Professional services	70221 : Financial management

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Office	Professional services	70229 : Management consultancy activities (other than financial management)
Office	Professional services	71111 : Architectural activities
Office	Professional services	71112 : Urban planning and landscape architectural activities
Office	Professional services	71121 : Engineering design activities for industrial process and production
Office	Professional services	71122 : Engineering related scientific and technical consulting activities
Office	Professional services	71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
Office	Professional services	71200 : Technical testing and analysis
Office	Professional services	72110 : Research and experimental development on biotechnology
Office	Professional services	72190 : Other research and experimental development on natural sciences and engineering
Office	Professional services	72200 : Research and experimental development on social sciences and humanities
Office	Professional services	73110 : Advertising agencies
Office	Professional services	73120 : Media representation
Office	Professional services	73200 : Market research and public opinion polling
Office	Professional services	74300 : Translation and interpretation activities
Office	Professional services	74901 : Environmental consulting activities
Office	Professional services	74902 : Quantity surveying activities
Office	Professional services	74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)
Office	Administrative & Supportive Service Activities	77400 : Leasing of intellectual property and similar products, except copyrighted works
Office	Administrative & Supportive Service Activities	78101 : Motion picture, television and other theatrical casting
Office	Administrative & Supportive Service Activities	78109 : Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec
Office	Administrative & Supportive Service Activities	78200 : Temporary employment agency activities
Office	Administrative & Supportive Service Activities	78300 : Other human resources provision
Office	Administrative & Supportive Service Activities	80100 : Private security activities
Office	Administrative & Supportive Service Activities	80200 : Security systems service activities
Office	Administrative & Supportive Service Activities	80300 : Investigation activities
Office	Administrative & Supportive Service Activities	82110 : Combined office administrative service activities
Office	Administrative & Supportive Service Activities	82190 : Photocopying, document preparation and other specialised office support activities
Office	Administrative & Supportive Service Activities	82200 : Activities of call centres
Office	Administrative & Supportive Service Activities	82301 : Activities of exhibition and fair organizers
Office	Administrative & Supportive Service Activities	82302 : Activities of conference organizers
Office	Administrative & Supportive Service Activities	82911 : Activities of collection agencies
Office	Administrative & Supportive Service Activities	82912 : Activities of credit bureaus
Warehousing	Administrative & Supportive Service Activities	82920 : Packaging activities
Office	Administrative & Supportive Service Activities	82990 : Other business support service activities nec
Office	Public Administration & Defence	84110 : General public administration activities
Office	Public Administration & Defence	84120 : Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
Office	Public Administration & Defence	84130 : Regulation of and contribution to more efficient operation of businesses
Office	Public Administration & Defence	84210 : Foreign affairs
Office	Public Administration & Defence	84300 : Compulsory social security activities
Office	Other Private Services	94110 : Activities of business and employers membership organisations
Office	Other Private Services	94120 : Activities of professional membership organisations
Office	Other Private Services	94200 : Activities of trade unions
Office	Other Private Services	94910 : Activities of religious organisations
Office	Other Private Services	94920 : Activities of political organisations
Office	Other Private Services	94990 : Activities of other membership organisations nec
Other industrial	Other Private Services	95110 : Repair of computers and peripheral equipment
Other industrial	Other Private Services	95120 : Repair of communication equipment
Other industrial	Other Private Services	95210 : Repair of consumer electronics
Other industrial	Other Private Services	95220 : Repair of household appliances and home and garden equipment
Other industrial	Other Private Services	95230 : Repair of footwear and leather goods
Other industrial	Other Private Services	95240 : Repair of furniture and home furnishings
Other industrial	Other Private Services	95250 : Repair of watches, clocks and jewellery
Other industrial	Other Private Services	95290 : Repair of other personal and household goods

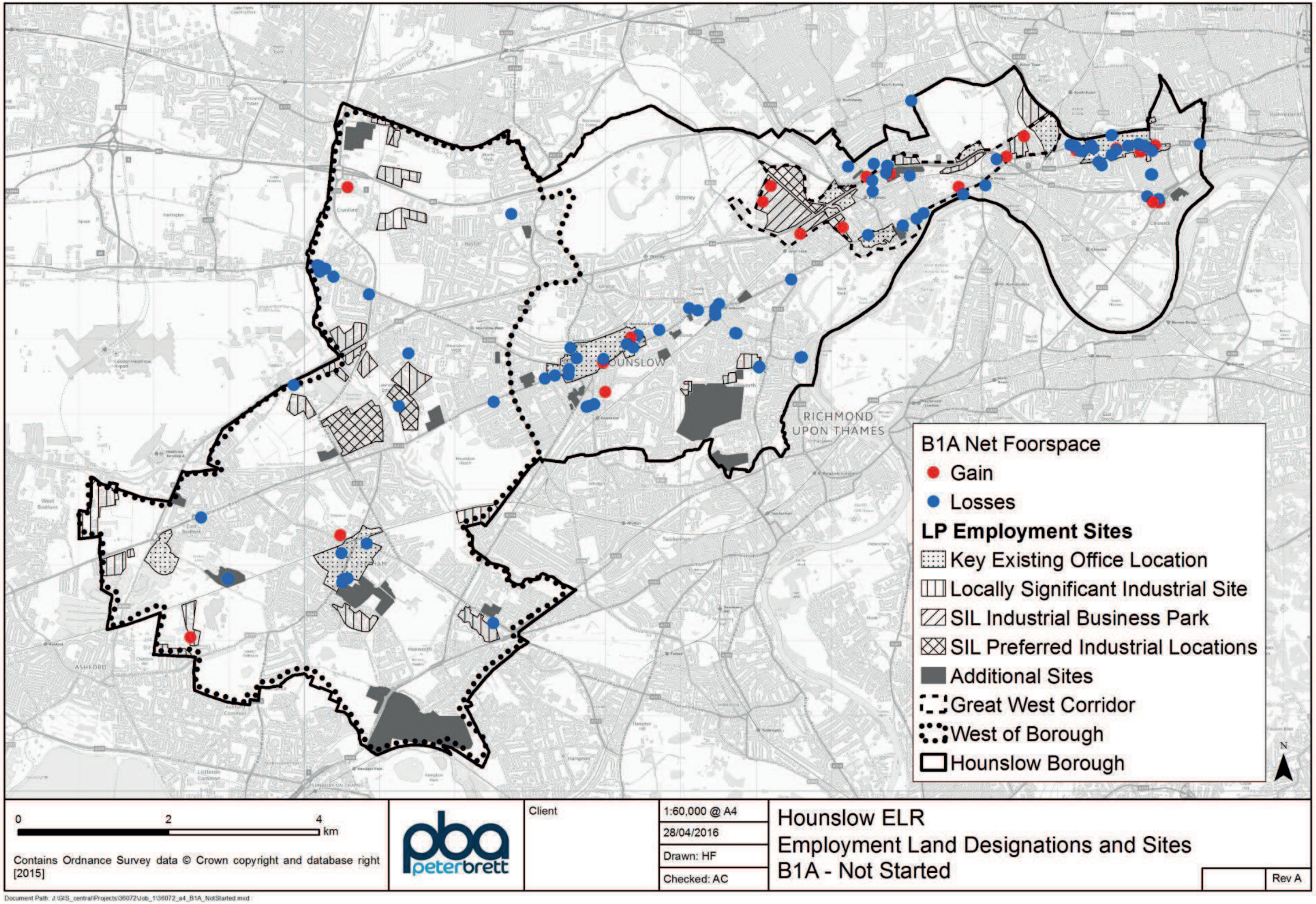
APPENDIX C MAP 5.1 OFFICE FLOORSPACE – GAINS AND LOSSES – 2012-15

Map 5.1 Office floorspace – gains and losses 2012-15



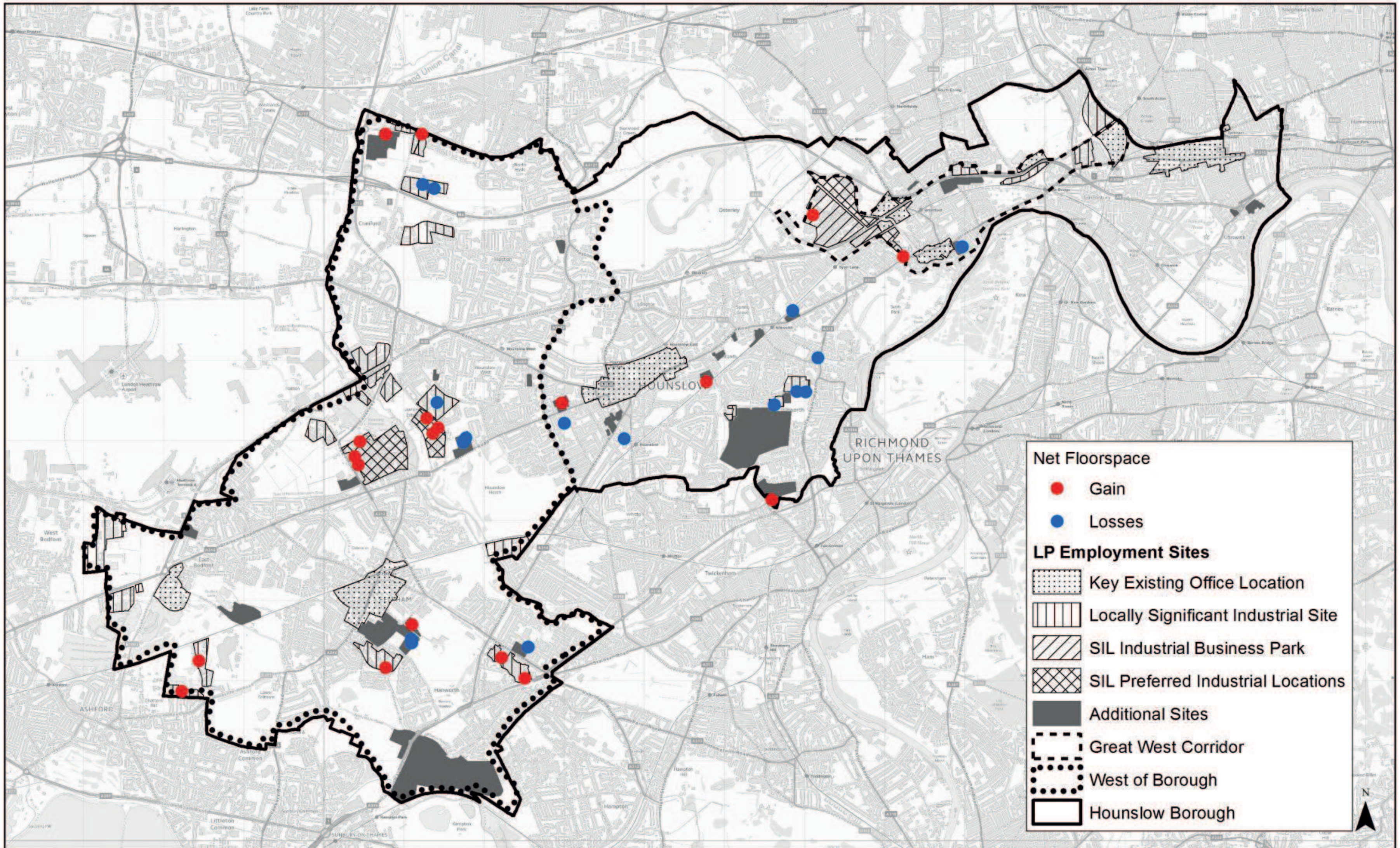
APPENDIX D MAP 5.2 OFFICE FLOORSPACE – PIPELINE PERMISSIONS – 2012-15

Map 5.2 – Office floorspace – pipeline permissions 2012-15



APPENDIX E MAP 5.3 INDUSTRIAL FLOORSPACE – GAINS AND LOSSES – 2012- 15

Map 5.3 – Industrial floorspace – gains and losses – 2012-15



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28/04/2016
Drawn: HF
Checked: AC

Hounslow ELR
Employment Land Designations and Sites
B1B, B1C, B2, B8 - Completed

Rev A

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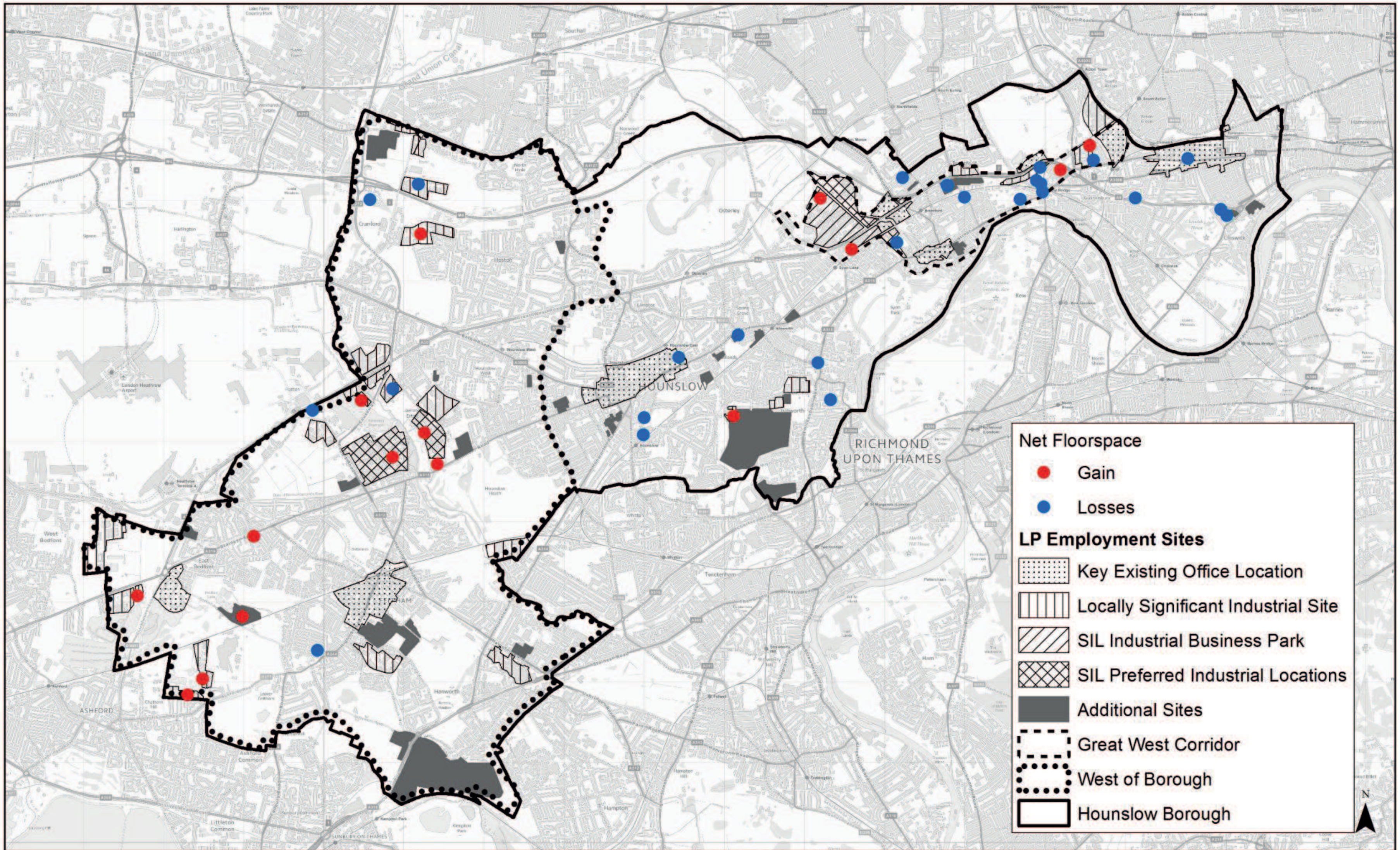
APPENDIX F MAP 5.4 – INDUSTRIAL FLOORSPACE – PIPELINE PERMISSIONS 2012-15

Map 5.4 – Industrial floorspace – pipeline permissions



peterbrett

Client

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28/04/2016

Drawn: HF

Checked: AC

Hounslow ELR
Employment Land Designations and Sites
B1B, B1C, B2, B8 - Not Started

Rev A

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