Quality information

Prepared by
James Tindale
Jon Howells

Checked by
Gregory Openshaw

Approved by
Gregory Openshaw

Revision History

<table>
<thead>
<tr>
<th>Revision</th>
<th>Revision date</th>
<th>Details</th>
<th>Authorised</th>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.</td>
<td>15th Dec 2016</td>
<td>Initial Findings</td>
<td>Yes</td>
<td>Gregory Openshaw</td>
<td>Associate Director</td>
</tr>
<tr>
<td>1.</td>
<td>7th Feb 2017</td>
<td>Draft Report</td>
<td>Yes</td>
<td>Gregory Openshaw</td>
<td>Associate Director</td>
</tr>
</tbody>
</table>
# Table of Contents

Executive Summary ................................................................................................................. 8  
Study Context ............................................................................................................................. 8  
Policy and Literature Review ..................................................................................................... 8  
Socio-economic Profile ............................................................................................................. 9  
Employment Land Supply ......................................................................................................... 9  
Property Market Assessment ................................................................................................. 12  
Demand Forecast ..................................................................................................................... 13  
2. Introduction ........................................................................................................................... 20  
2.1 Study Context ...................................................................................................................... 20  
2.2 Objectives ............................................................................................................................ 20  
2.3 Approach .............................................................................................................................. 21  
2.4 LB Enfield’s Functional Economic Market Area ................................................................... 21  
3. Literature Review ................................................................................................................... 23  
3.1 Introduction .......................................................................................................................... 23  
3.2 National Policy .................................................................................................................... 23  
3.3 Regional Policy .................................................................................................................... 24  
3.4 Local Policy .......................................................................................................................... 30  
3.5 Employment Land Policy of FEMA Local Authorities ........................................................... 35  
3.6 Summary .............................................................................................................................. 39  
4. The Local Economy ............................................................................................................. 40  
4.1 Introduction .......................................................................................................................... 40  
4.2 Population ............................................................................................................................. 40  
4.3 Workforce and employment .............................................................................................. 40  
4.4 Earnings ............................................................................................................................... 41  
4.5 Skills and Training .............................................................................................................. 41  
4.6 Occupational Classifications ............................................................................................ 41  
4.7 Travel to Work .................................................................................................................... 43  
4.8 Business ............................................................................................................................. 45  
4.9 Employment Sectors .......................................................................................................... 46  
4.10 Summary ............................................................................................................................ 51  
5. Supply .................................................................................................................................. 52  
5.1 Introduction .......................................................................................................................... 52  
5.2 Employment Land Surveyed .............................................................................................. 52  
5.3 Sub-Area Analysis .............................................................................................................. 56  
5.4 Quality of Existing Employment Clusters ........................................................................ 74  
5.5 Vacant Industrial Land and Vacant Floorspace ................................................................ 81  
5.6 Prospects for Intensification of B Use Classes ................................................................... 82  
5.7 Recent Development ......................................................................................................... 85  
5.8 Key Sectors .......................................................................................................................... 86  
5.9 Activities Supporting the Functioning of Inner London ....................................................... 88  
5.10 Summary ............................................................................................................................ 88  
6. Commercial Property Market ............................................................................................. 90  
6.1 Introduction and Approach ............................................................................................... 90  
6.2 Industrial Markets .............................................................................................................. 90  
6.3 Office Markets ................................................................................................................... 96  
6.4 Summary ............................................................................................................................ 103  
7. Demand Forecast ................................................................................................................. 105  
7.1 Introduction and Approach ............................................................................................... 105  
7.2 Historic Trends and Future Projections ............................................................................ 106  
7.3 Employment Forecasts ....................................................................................................... 112
Appendix A: LB Enfield’s Functional Economic Market Area .......................... 138
Appendix B: Mapping of Supporting Information ......................................... 141
Appendix C: Mixed Use Typologies ................................................................. 146
  Business Typologies and Compatibility with Mixed Use Development .......... 146
  Considerations for Redevelopment .............................................................. 147

Figures

Figure E-1 LB Enfield Employment Land Clusters: Context Map ....................... 11
Figure 5-1 LB Enfield Employment Land Clusters: Context Map ....................... 53
Figure 5-2 Freezy Water and Innova Park Sub-area ........................................ 58
Figure 5-3 Brimsdown Sub-area ..................................................................... 61
Figure 5-4 Central Leeside Sub-area ............................................................... 64
Figure 5-5 A10 and Southbury Junction Sub-area .......................................... 66
Figure 5-6 North Circular Corridor Sub-area .................................................. 69
Figure 5-7 Town Centres Sub-area ................................................................. 71
Figure 5-8 Other Clusters ............................................................................. 73
Figure 5-9 Strategic Transport Routes and Public Transport Accessibility .......... 80
Figure 6-1 Stock of Industrial Floorspace (2009 to 2016) ............................... 91
Figure 6-2 Average Size of Industrial Units (2016) ......................................... 92
Figure 6-3 Industrial Rental Values by Local Authority and the FEMA (2009 to 2016) ........................................................................................................ 94
Figure 6-4 Vacancy Rates by Local Authority Area and the Overall FEMA (2007 to 2016) ........................................................................................................ 95
Figure 6-5 Net Absorption of Industrial Floorspace in Enfield and the FEMA (2007 to 2016) ........................................................................................................ 96
Figure 6-6 Stock of Office Floorspace (2007 to 2016) ..................................... 98
Figure 6-7 Average Size of Office Units (2016) ................................................. 99
Figure 6-8 Office Rental Values by Local Authority and the FEMA (2007 to 2016) ........................................................................................................ 101
Figure 6-9 Vacancy Rates by Local Authority Area and the Overall FEMA (2007 to 2016) ........................................................................................................ 102
Figure 6-10 Net Absorption of Office Floorspace in Enfield and the FEMA (2007 to 2016) ........................................................................................................ 103
Figure 7-1 Office Floorspace in the FEMA, 2001 to 2015 ................................. 107
Figure 7-2 Industrial Floorspace in the FEMA, 2001 to 2016 ........................... 108
Figure 7-3 Office Employees (2001 to 2015) .................................................... 110
Figure 7-4 Manufacturing Employees (2001 to 2015) ..................................... 110
Figure 7-5 Warehousing Employees (2001 to 2015) ....................................... 111
Figure 8-1 Completions by Use Class (2000 to 2016) ..................................... 122
Figure 8-2 Completions by Ward (2000 to 2016) ............................................ 123
Figure 8-3 Uncompleted and Unimplemented Permissions ................................ 124
Figure 8-4 Office to Residential Conversions (2000 to 2016) ........................ 125
Figure B-1 Industrial Employment Density .................................................... 141
Figure B-2 Non-B Use Employment Floorspace .............................................. 142
Figure B-3 Non-B Use Employment Floorspace .............................................. 143
Figure B-4 Road Delay Morning (AM)  Figures represent delays in seconds; longer delays presented as thicker lines ................................. 144
Tables

Table E-1 Surveyed Employment Clusters – November 2016 ............................................. 10
Table E-2 Net Additional Requirement for Office Floorspace up to 2036 ....................... 14
Table E-3 Net Additional Requirement for Industrial Land up to 2036 ......................... 15
Table 3-1 Neighbouring Local Authority Economic Objectives and Employment Land Positions .......................................................... 36
Table 4-1 LB Enfield Resident and Workplace Earnings 2015 ...................................... 41
Table 4-2 Population Qualifications Profile ................................................................ 41
Table 4-3 Resident Employment by Occupation Category, 2015 ................................ 43
Table 4-4 Top 10 Employment Destinations for LB Enfield Residents ...................... 44
Table 4-5 Workers of Enfield Commuting from Elsewhere ......................................... 44
Table 4-6 Businesses by Size Band .............................................................................. 45
Table 4-7 Employment by Broad Industrial Group in 2015 ........................................ 47
Table 4-8 Location Quotients within the LB Enfield (Greater London = 1.0) (2015) ...... 50
Table 5-1 Surveyed Employment Clusters – November 2016 .................................. 55
Table 5-2 Freezy Water and Innova Park Sub-area Clusters ........................................ 56
Table 5-3 Brimsdown Sub-area Clusters ..................................................................... 59
Table 5-4 Central Leeside Sub-area Clusters .............................................................. 62
Table 5-5 A10 and Southbury Junction Sub-area Clusters .......................................... 65
Table 5-6 North Circular Sub-area Clusters ................................................................. 67
Table 5-7 Town Centre Sub-area Clusters .................................................................. 70
Table 5-8 Other Non-Sub-area Clusters .................................................................... 72
Table 5-9 Existing Employment Clusters ................................................................... 75
Table 5-10 Clusters with Vacant Industrial Land ........................................................ 81
Table 5-11 Clusters with Prospects for Intensification or Change .............................. 83
Table 6-1 Stock of Industrial Floorspace (2016) ......................................................... 90
Table 6-2 Industrial Stock by Unit Size (2016) ............................................................. 92
Table 6-3 Industrial Rental Values (2016) ................................................................. 93
Table 6-4 Vacancy and Availability of Industrial Premises (2016) .............................. 94
Table 6-5 Stock of Office Floorspace (2016) .............................................................. 97
Table 6-6 Office Stock by Unit Size (2016) ................................................................. 99
Table 6-7 Office Rental Values (2016) ...................................................................... 100
Table 6-8 Vacancy and Availability of Office Premises .............................................. 102
Table 7-1 Historic Floorspace by B Use Class, 2001 to 2015 .................................... 106
Table 7-2 Employees by B Use Class 2001 to 2015 ..................................................... 109
Table 7-3 Summary of Historic Trends ..................................................................... 111
Table 7-4 Employment Projections 2016 to 2036 ....................................................... 112
Table 7-5 Labour Supply Projections ....................................................................... 113
Table 7-6 Calculated Future Floorspace Growth Rates .............................................. 115
Table 8-1 Net Additional Requirement for Office Floorspace up to 2036 ................. 121
Table 8-2 Net Additional Requirement for Industrial Land up to 2036 ....................... 120
Acronyms

APS  Annual Population Survey
ASHE Annual Survey of Hours and Earnings
BRES Business Register and Employment Survey
CAGR Compound Annual Growth Rate
DCLG Department of Communities and Local Government
ELR Employment Land Review
FEMA Functional Economic Market Area
GLA Greater London Authority
GVA Gross Value Added
IMD Indices of Multiple Deprivation
LSIS Locally Significant Industrial Site
LQ Location Quotient
NVQ National Vocational Qualifications
ONS Office of National Statistics
SIC Standard Industrial Classification
SIL Strategic Industrial Location
SOC Standard Occupational Classification
TTWA Travel to Work Area
WAML West Anglia Mainline
Executive Summary

Study Context

AECOM was commissioned by the London Borough (LB) of Enfield to undertake an Employment Land Review (ELR) of the Borough. The ELR assesses the quantity, quality and viability of the Borough’s employment land to form an evidence base to support the review of LB Enfield’s Local Plan. The ELR will inform the future approach to the provision, protection, release and enhancement of employment land and premises.

The approach to undertaking the ELR aligns with National Planning Policy Framework (NPPF) and Planning Policy Guidance (2016). The approach captured the following:

- A review of planning policy and relevant strategy documents which influence current and future land use
- An assessment of the local economy
- A survey of employment land supply in the borough
- A review of the commercial property market drawing upon CoStar data
- A forecast of the potential net additional demand arising over the Local Plan period; and
- A comparison of supply and demand to inform options and the Council’s future approach to employment land use planning provision.

The UK Planning Practice guidance outlines that ‘need’ should be assessed within the context of a Functional Economic Market Area (FEMA), which for Enfield is found to consist of the following local authorities:

- Barnet
- Broxbourne
- Epping Forest
- Haringey
- Hertsmere
- Waltham Forest; and
- Welwyn and Hatfield.

Policy and Literature Review

The NPPF replaced PPSs as of March 2012 with the aim to make the planning system less complex and to promote sustainable growth. The NPPF recognises that the planning system plays an important role in promoting economic growth and building a strong, competitive economy. Key regional policy on employment land-use is contained in the London Plan (2016) and GLA Land for Industry and Transport SPG (2012). It is notable that the overarching approach to industrial land management in London is presently being revisited by the GLA as evidenced by the preparation of the supply assessment undertaken by AECOM in 2015, the London Industrial Land Supply and Economy Study and a demand assessment being prepared by consultants, that together would inform a new SPG and a revised London Plan.
The current London Plan sets out its vision for the North London sub-region, of which LB Enfield is a part. The centre of the vision is on optimising the development of its Opportunity Areas; tackling barriers to work and social exclusion; managing the release of surplus industrial land; and planning effectively for sustainable economic growth, including in sectors of new and emerging technologies. The Borough’s location in the centre LSCC means that it has the potential to take advantage of these sectors in the future.

At the local level LB Enfield adopted the Core Strategy in 2010. The Strategy is the overarching planning policy document in the Council’s LDF and sets out the Council’s vision for the Borough up until 2026. A number of other documents in the LDF support the Core Strategy. These include the Development Management, North East Enfield AAP and North Circular AAP. In addition to the current LDF, the Council is preparing a new Local Plan and Central Lea-side AAP. All documents present the Council’s vision for the Borough as one that has potential for growth, taking advantage of the Borough's largest opportunities and strengths such as Meridian Water, its large stock of industrial land and strategic location in the Upper Lee Valley OA.

Overall, the literature and planning policy review has emphasised the need for LB Enfield to plan ahead to unlock the Borough's key regeneration opportunities, maximise its locational advantage and efficiently utilise its current employment land stock to break from previous growth trends.

Socio-economic Profile

LB Enfield has a growing population. The population is relatively well skilled in comparison to the Borough's FEMA, but is not as well paid and holds lower proportions of jobs in higher skilled occupations. Residents who do not work in the Borough are most likely to commute to central London. The local workforce commutes in from the surrounding FEMA and is less well paid than the residents. This suggests that jobs in LB Enfield are lower value in comparison to the ones residents out commute to elsewhere in London.

The Borough's economy in its current state is based upon public services, industrial and warehouse associated activities and lower value services such as retail. Recent economic growth has mainly been in these sectors. However, there has also been employment expansion in sectors more typically associated with higher value jobs such as information and communications and professional, scientific and technical. Innovative sub-sectors such as civil engineering and industrial cleaning are also flourishing. These sectors could provide a base from which the Borough's economy can use as a foundation to develop more high value jobs.

This section has introduced the socio-economic profile of LB Enfield with the most up to date data, benchmarked against London. The most meaningful indicators for this ELR are changes to the supply and demand of employment land, and we analyse how this has changed in the following sections of the report.

Employment Land Supply

Study Area and Scope

AECOM’s qualitative survey of employment clusters within LB Enfield compromised site visits to 35 separate clusters. This was combined with some elements of desktop
research. The clusters include: 14 SIL; nine LSIS, ten non-designated employment areas; and two town centres, listed in Table E-1 and shown in Figure E-1.

Table E-1 Surveyed Employment Clusters – November 2016

<table>
<thead>
<tr>
<th>Cluster No.</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>Area (hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Freezy Water</td>
<td>SIL</td>
<td>10.8</td>
</tr>
<tr>
<td>C2</td>
<td>Innova Park</td>
<td>SIL</td>
<td>26.8</td>
</tr>
<tr>
<td>C3</td>
<td>Brimsdown Part A</td>
<td>SIL</td>
<td>20.5</td>
</tr>
<tr>
<td>C4</td>
<td>Brimsdown Part B</td>
<td>SIL</td>
<td>64.1</td>
</tr>
<tr>
<td>C5</td>
<td>Brimsdown Part C</td>
<td>SIL</td>
<td>50.5</td>
</tr>
<tr>
<td>C6</td>
<td>Meridian Business Park</td>
<td>SIL</td>
<td>14.2</td>
</tr>
<tr>
<td>C7</td>
<td>Redburn Trading Estate</td>
<td>SIL</td>
<td>4.1</td>
</tr>
<tr>
<td>C8</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part A</td>
<td>SIL</td>
<td>33.4</td>
</tr>
<tr>
<td>C9</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part B</td>
<td>SIL</td>
<td>17.2</td>
</tr>
<tr>
<td>C10</td>
<td>Montagu Industrial Area North</td>
<td>SIL</td>
<td>9.6</td>
</tr>
<tr>
<td>C11</td>
<td>Montagu Industrial Area South</td>
<td>LSIS</td>
<td>6.2</td>
</tr>
<tr>
<td>C12</td>
<td>Aztec 406</td>
<td>SIL</td>
<td>16.6</td>
</tr>
<tr>
<td>C13</td>
<td>Eley's Estate</td>
<td>SIL</td>
<td>29.0</td>
</tr>
<tr>
<td>C14</td>
<td>Edmonton Eco Park</td>
<td>SIL</td>
<td>16.1</td>
</tr>
<tr>
<td>C15</td>
<td>Harbet Road industrial Estate</td>
<td>SIL</td>
<td>19.2</td>
</tr>
<tr>
<td>C16</td>
<td>Alma Road</td>
<td>LSIS</td>
<td>4.8</td>
</tr>
<tr>
<td>C17</td>
<td>New Southgate Industrial Estate</td>
<td>LSIS</td>
<td>0.7</td>
</tr>
<tr>
<td>C18</td>
<td>Regent's Avenue</td>
<td>LSIS</td>
<td>2.0</td>
</tr>
<tr>
<td>C19</td>
<td>Oakthorpe Dairy</td>
<td>LSIS</td>
<td>3.2</td>
</tr>
<tr>
<td>C20</td>
<td>Commercial Road and North Middlesex Estate</td>
<td>LSIS</td>
<td>10.1</td>
</tr>
<tr>
<td>C21</td>
<td>Langhedge Lane Industrial Estate</td>
<td>LSIS</td>
<td>0.7</td>
</tr>
<tr>
<td>C22</td>
<td>Claverings Industrial Estate</td>
<td>LSIS</td>
<td>3.3</td>
</tr>
<tr>
<td>C23</td>
<td>Queensway Industrial Estate</td>
<td>LSIS</td>
<td>3.5</td>
</tr>
<tr>
<td>C24</td>
<td>Kingswood Industrial Estate</td>
<td>Not Designated</td>
<td>2.0</td>
</tr>
<tr>
<td>C25</td>
<td>Dairy Crest Depot</td>
<td>Not Designated</td>
<td>0.4</td>
</tr>
<tr>
<td>C26</td>
<td>Brettenham Road Warehouse</td>
<td>Not Designated</td>
<td>0.3</td>
</tr>
<tr>
<td>C27</td>
<td>Park Avenue Garage</td>
<td>Not Designated</td>
<td>0.4</td>
</tr>
</tbody>
</table>
Cluster No. | Cluster Name                                      | Designation       | Area (hectares) |
------------|--------------------------------------------------|-------------------|-----------------|
C28         | Picketts Lock Wholesale                          | Not Designated    | 2.5             |
C29         | GR Wright and Sons                               | Not Designated    | 2.1             |
C30         | Wharf Road Industrial Estate                     | Not Designated    | 0.6             |
C31         | Ripmax                                           | Not Designated    | 0.5             |
C32         | Argon Road Industrial Estate                     | Not Designated    | 5.9             |
C33         | Barrow Well Green Recycling Centre               | Not Designated    | 0.4             |
C34         | Enfield Town Centre                              | Town Centre       | 23.3            |
C35         | Southgate Town Centre                            | Town Centre       | 10.4            |
**Total**   |                                                  |                   | **415.3**       |

Source: AECOM 2016.

**Figure E-1 LB Enfield Employment Land Clusters: Context Map**

The assessment was conducted based on a set of site appraisal criteria (which were agreed with the Council in advance) from which detailed analysis was carried out to identify the typologies of employment land within the Borough.

**Supply of B-use classes**

Our survey identified that employment land within LB Enfield consists of a number of larger, established business locations (Brimsdonnd and Central Leeside), contrasted by a number of smaller business centres (Redburn Trading Estate and Kingswood Industrial
Clustering of employment uses was typically seen in larger employment areas which contain a high number of logistics and distribution warehouses, which hold businesses not typically associated with agglomeration economies.

Overview of Clusters

Our assessment concludes that the majority of clusters surveyed are functioning well for the uses contained within them, have high occupancy rates and support a diverse range of business types. The Borough's SIL areas comprise among the largest supply of strategic quality land in Greater London, and are generally in good or very good condition accommodating many medium and large firms with a focus on supermarket logistics, food processing and increasingly e-commerce fulfilment centres, with some retail/trade counter uses also observed. The Borough’s LSIS are more mixed in character with some good quality examples (e.g. Oakthorpe Dairy C19), and several poorer ones, with a prevalence of sui-generic and non-B uses in several instances. Non-designated clusters vary in character from underused/derelict land to sites of reasonable quality. Office uses are concentrated mostly in or adjacent to Enfield (C34) and Southgate (C35) town centres, with some additional fairly new examples in the south of Innova Park (C2) SIL, and occasional examples within LSIS. Stock is mostly characterised by medium sized buildings of fair quality, some in multiple-occupancy others singly used. Smaller units are uncommon with some examples at Chase Road, Southgate (C35).

There is evidence that little employment land has been lost to pure residential or residential led mixed-use development in recent years. New development in clusters is focused upon either large warehousing or small to medium warehousing and manufacturing units. The large warehousing is being occupied by logistics and distribution businesses, while medium to small units are being occupied by a high number of non-B use businesses. No new office development within any employment clusters was observed during the site survey though office to residential conversion was noted.

The survey found that there are a number of large, medium and small scale opportunities for redevelopment and intensification within clusters. There are major opportunities in clusters such as Harbet Road Industrial Estate, Claverings Industrial Estate and both parts of the Montagu Industrial Area, smaller opportunities are present in clusters including Brimsdown Part B. Many of the sites surveyed within the Borough serve a strategic role, and our demand assessment in section 6 helps to clarify planning options for the future role of the 35 employment clusters surveyed.

Property Market Assessment

A summary of property market information pertaining to LB Enfield’s office market is as follows:

- LB Enfield has a relatively small office market, dominated by smaller units.
- Both vacancy and availability rates are low relative to the wider FEMA, implying a tighter market environment.
- Lower levels of vacancy for larger units suggests that the limited availability of grow-on space may constrain the growth of businesses as they move up the accommodation ladder.
- Average unit sizes and rental values are broadly in line with the FEMA averages.
Net absorption is observed to be positive across both LB Enfield and the FEMA, suggesting positive future demand for office space.

A summary of the ELR’s analysis of LB Enfield’s industrial land and property market is as follows:

- LB Enfield has the largest industrial market within the FEMA, representing almost a third of all stock.
- Industrial units in LB Enfield are large, implying a significant presence of storage/distribution uses, as also observed during the site survey.
- Rental values in LB Enfield are slightly higher than average for the FEMA.
- The highest rates of both vacancy and availability across the FEMA are observed in LB Enfield.
- Vacancy increases with the size of units, suggesting that there may be limited availability of smaller units to accommodate SMEs.
- Positive net absorption across LB Enfield and the FEMA suggests positive trends in the demand for industrial occupation.
- Manufacturing (B1c/B2) floorspace has overall seen a net increase in the period since 2000, although no overall pattern is observed. Growth in floorspace is concentrated in the Enfield Highway and Enfield Lock wards, offsetting a contraction observed elsewhere.
- However, information on permissions that have been started but not yet completed indicates that around 283,000sqm of manufacturing floorspace could soon be lost to other uses.

Demand Forecast

This forecast of demand for employment land and premises is undertaken separately for office floorspace and manufacturing/warehouse land. The forecast is largely driven by quantitative analysis, though it is informed by qualitative findings from other sections of this review including consultations.

Our approach looks at both the macro-economic forecast and historic trend based forecast and considers their suitability for forecasting future land and floorspace needs. Our approach involves the following steps:

- A review of historic trends in floorspace and employment and the relationship between these two variables, drawn from ONS data
- A review of projections in office and manufacturing/warehouse employment using GLA Economics data¹ and consider how these compare against historic trends; and
- Based on historic trends and future projections, or a combination of the two, forecast employment floorspace and land requirements for office, manufacturing and warehousing space.

At each step, the analysis considers trends for office and industry across Enfield and the wider FEMA so that local and wider economic and property markets can be compared. As per the PPG guidance our demand forecast presents an unconstrained assessment of future need (though implicit within past trends data are constraining factors such as the nature of the commercial property market, market failure, etc).

¹ Autumn 2015
The forecasting exercise has analysed past and projected data on employment and floorspace to inform a view on the indicative direction and strength of demand for office and industrial uses could be over the longer term to 2036. The projected rate of growth is unconstrained in that it is not limited by supply (availability and suitability of sites and premises and policy), though implicit within the trend analysis data are constraints on demand (access to finance and suitably skilled labour, appropriately accommodation, rental and leasing arrangements etc.).

The forecast in demand is based upon the logic that the historic relationship between floorspace provision and employment change holds true for future employment projections. There are however a number of driving factors which could drive a step change in demand for businesses space in Enfield such as: strategic transport improvements, large scale regeneration and an acceleration in the loss of industrial land North / East / West London, and technology change. As such the calculated projected rate of growth should be used as an indicator of the potential direction and strength of requirement to inform policy setting, but not as a definitive requirement, which must be met.

**Comparison of Supply and Demand**

**Calculating Future Demand**

The analysis undertaken in this section of the ELR compares the projected future demand for the local/sub-regional office market floorspace and local/sub-regional industrial market land over the period 2016-2036 with existing supply conditions across the Borough, taking into account vacant floorspace and land which is vacant and developable or has derelict buildings.

The results of the employment land demand forecast, accounting for supply, are shown below. The calculated industrial land requirement is shown in Table E-2 and office floorspace demand in Table E-3.

**Table E-2 Net Additional Requirement for Office Floorspace up to 2036**

<table>
<thead>
<tr>
<th>Demand for Industrial Land</th>
<th>Industrial Land (Ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Total stock of core industrial land (2016) plus vacant land [B+C]</td>
<td>329.1</td>
</tr>
<tr>
<td>B. Current vacant industrial land equivalent (4.7%)</td>
<td>15.5</td>
</tr>
<tr>
<td>....of which is actively marketed vacant land</td>
<td>...2.9</td>
</tr>
<tr>
<td>C. Supply of occupied core industrial land (2016) [A-B]</td>
<td>313.6</td>
</tr>
<tr>
<td>D. Land demand to 2036</td>
<td>46.1</td>
</tr>
<tr>
<td>E. Optimum frictional vacancy at 2036 [5% of C+D]</td>
<td>18.0</td>
</tr>
<tr>
<td>F. Additional Demand for Utilities, Transport and Waste Management 2016-2036</td>
<td>1.8</td>
</tr>
<tr>
<td>G. Surplus/deficit of vacant land in 2036 [E-B]</td>
<td>2.5</td>
</tr>
<tr>
<td>H. Gross requirement for industrial land 2016-2036 [A+D+F+G]</td>
<td>379.5</td>
</tr>
</tbody>
</table>
I. Net requirement for industrial land 2016-2036 [H-A] 50.4

Source: AECOM.

Table E-3 Net Additional Requirement for Industrial Land up to 2036

<table>
<thead>
<tr>
<th>Demand for Office Floorspace</th>
<th>Office Floorspace (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Supply of occupied office floorspace (2016)</td>
<td>163,200</td>
</tr>
<tr>
<td>B. Current vacant office floorspace (1.1%)</td>
<td>1,800</td>
</tr>
<tr>
<td>C. Total stock of office floorspace (2016) [A+B]</td>
<td>165,000</td>
</tr>
<tr>
<td>D. Floorspace demand to 2036</td>
<td>17,000</td>
</tr>
<tr>
<td>E. Optimum frictional vacancy at 2036 [5% of A+D]</td>
<td>9,000</td>
</tr>
<tr>
<td>F. Surplus/deficit of vacant floorspace in 2036 [E-B]</td>
<td>7,200</td>
</tr>
<tr>
<td>G. Gross requirement for office floorspace 2016-2036 [C+D+F]</td>
<td>189,200</td>
</tr>
<tr>
<td>H. Net requirement for office floorspace 2016-2036 [G-C]</td>
<td>24,200</td>
</tr>
</tbody>
</table>

Source: AECOM.

Development Pipeline and Permitted Development Rights

Planning applications with consent yet to be implemented or under construction could meet the net additional demand arising over the Local Plan period. However, there is a possibility that some developments may not come forward at all or are amended.

For office, the development pipeline measures shows that the large majority of permissions not yet completed will be realised. The net impact of permissions already commenced is equal to a net loss of 27,400sqm of office floorspace, while an additional 7,200sqm may be lost if the unimplemented permissions are realised. A total of 34,600sqm office space could therefore be lost.

For the industrial uses (B1c/B2 use class), the uncompleted developments would result in a net loss of 283,800sqm. However this is offset by a pipeline of 390,200sqm in B8 uses. This means the industrial and warehousing pipeline could provide a net additional +106,400sqm (approximately 23.6ha assuming a plot ratio of 0.45).

Conclusions

Industrial and Warehousing Supply

There are a total of 451.5ha of land currently in industrial use in Enfield, of which 326.2ha of land is occupied by core industrial and warehousing uses or is vacant. Floorspace measures 1,271,800sqm.
Supply is focused along two axes; the Upper Lea Valley in the east, running north to south, and the A206 corridor in the south, running west to east.

The profile of industrial businesses operating within the Borough is mixed, with a reasonable contingent of larger businesses present engaged in logistics and warehousing operations, concentrated in the Upper Lea Valley, and SMEs with a local/sub-regional market reach dispersed throughout the Borough though principally in the south and east.

The majority of employment land within existing SIL and several of the LSIS areas remain the most suitable locations in Enfield for accommodating industrial and warehousing demand based on their characteristics and assessed quality (the excellent strategic road access to markets and supply chains, access to an appropriately skilled workforce, the size of industrial clusters, and the clear demarcation and separation from sensitive uses).

Land is also occupied by wider industrial uses which serve strategically important city-functioning roles.

Vacancy among industrial premises is low, vacant land churn is generally strong and rental values are relatively buoyant – all of which point towards supply being in a generally healthy state. The pipeline development of high specification premises on a large scale at Enfield Distribution Park, Innova Park and Navigation Park.

**Industrial and Warehousing Demand**

Demand is calculated at 50.4ha though this unconstrained by supply and policy objectives.

The calculated demand cannot be accommodated by current vacant land and development opportunities, though the development pipeline of B1c/2/8 uses, if it comes forward, could accommodate a large proportion of this demand.

The implications of this supply–demand imbalance suggests a need to find a better use of existing space through intensification, the promotion of mixed development, via the identification of new industrial sites. Demand for industrial land also needs to be set against the demand for other uses such as residential, leisure, retail and infrastructure space.

**Office Supply**

There is approximately 217,500sqm of office floorspace in LB Enfield, accommodating local level provision servicing local market, with some limited sub-regional reach. This stock is primarily located within or close to the town centre areas of Enfield and New Southgate with a further limited presence within the SIL and LSIS areas.

The market is dominated by a supply of small units, such as at Southgate Office Village, albeit with several larger multi-tenanted premises close to the town centres, with vacancy levels being low both absolutely and relative to the FEMA. Stock within industrial areas is mostly low-grade, though there are exceptions.

PTAL ratings are mostly below that required to attract large-scale development, and attracting occupiers from beyond the local market is and will continue to be a challenge.
Office Space Demand

Our forecasting exercise estimated that there is additional demand for approximately 24,000sqm of office floorspace in the planning period to 2036. This represents an 11% increase to existing stock.

This is not say that demand could be stronger, particularly if the policy context supported office space growth through, for example, masterplanning of key growth areas such as Central Leeside. There is potential for step change in demand through new infrastructure provision such as Crossrail2, were it to come about, which would act as a significant driver of office space demand.

Recommendations

Industry and Warehousing (B1c/B2/B8)

Retention

At present, LB Enfield through its Local Plan designates industrial employment areas as Strategic Industrial Locations and Locally Significant Industrial Sites; designations which are consistent with London Plan policy 2.17 regarding the protection of industrial land. Such designations ostensibly protect these sites from redevelopment for non-B uses.

This review has concluded that the majority of SIL areas in the Borough are suitable and recommended for retention as such going forward:

- Freezywater (Cluster 1)
- Innova Park (C2)
- Brimsdown (C3, 4 and 5)
- Meridian Business Park (C6)
- Redburn Trading Estate (C7)
- Great Cambridge Road and Martinbridge Trading Estate Part A (C8)
- Great Cambridge Road and Martinbridge Trading Estate Part B (C9)
- Montagu Industrial Area North (C10)
- Aztec 406 (C12)
- Eley's Estate (C13), and
- Edmonton Eco Park (C14).

Enfield’s LSIS portfolio comprise mostly well performing smaller estates and single-occupier sites, and/or serve an important function in providing both local jobs and products that cater to the needs of the local economy. Those LSIS which this review recommends should be retained over the Local Plan period. These are:

- New Southgate Industrial Estate (C17)
- Oakthorpe Dairy (C19)
- Commercial Road and North Middlesex Estate (C20)
- Langhedge Lane Industrial Estate (C21), and
- Queensway Industrial Estate (C23).
Change

Whilst the great majority of designated industrial land in Enfield is recommended for retention the Council should consider policy measures to support change on industrial land to support growth. Change can be classified as:

- Intensification
- Mixed-use development (where regeneration opportunities exist and demand/appetite), or
- The release of poor quality designated employment land for more productive means.

Intensification

Intensification of industrial land could occur in several ways, such as; increasing building footprints within sites and plots; use of vacant land, and; changing the form or typology of buildings to provide more workspace.

It is not within the remit of an ELR to identify/specify the means by which new typologies can be introduced (including advising of relevant consenting considerations), however broad areas where intensification would be appropriate have been identified, comprising mostly SIL areas. These include, though should be not limited to:

- Brimsdown (C5, particularly given characteristics, and to a minor extent C3 and C4)
- Great Cambridge Road and Martinbridge Trading Estate SIL (C8 and C9)
- Aztec 406 (C12), and
- Eley’s Estate (C13).

Mixed use

A means by which new employment space of specification appropriate to the needs of modern occupiers can be delivered would be via mixed-use redevelopment of sites where transport accessibility and access to facilities and amenities is strong enough to support non-B uses and B1a/b/c uses.

Though many clusters are well-functioning and the impetus for mixed-use development may not exist, opportunities may exist in the south-east over time through planned regeneration at sites already close to stations, for example, at and around Edmonton Leaside, such as potentially at Harbet Road (C15) and the non-designated Argon Road (C32) industrial estates which lie close to Angel Road station, or Queensway Industrial Estate (C23).

Release of designated industrial land

In keeping with the principles of the NPPF, when local planning authorities are assessing the appropriateness of their employment land stock for ongoing use, taking into account wider regeneration objectives and demand for other use, particular consideration should be given to sites which are in poor quality or are underused.

Where such sites are identified, local planning authorities could permit a change of use away from industrial use.

Release of designated sites does not automatically mean the loss of the industrial uses and employment on-site, but opens the possibility for the market to intervene to provide sustainable redevelopment under the right conditions.

Clusters Alma Road (C16), Regent’s Avenue (C18) (though bus depot site unlikely to be redeveloped) and Claverings Industrial Estate (C22) offer opportunities or release.
Office (B1a/b)

Based on the evidence base the most suitable locations for accommodating this additional demand will be Enfield and New Southgate town centres.

Where mixed-use development opportunities present themselves, it may be appropriate to accommodate a quantum of B1 a/b space within redeveloped sites, such as at Edmonton Leaside. As noted above, mixed-use development of reasonable density should occur only where PTAL ratings and access to facilities and amenities allow.

Monitoring

This study has identified that there is a positive net demand for land and floorspace both for industrial and office uses. Whilst monitoring of both take-up of vacant land/floorspace/units and of change to non-employment uses is important to ensure effective spatial planning, it is particularly important here in Enfield where demand for land/floorspace may exceed supply, and thus unmanaged changes/contractions in stock may harm economic growth.

The Council should look to monitor:

- The provision of non designated industrial land
- Take-up of premises within designated land by retail, trade counter and sui-generis occupiers, and faith groups; and
- The loss of office space through PDR.
2. **Introduction**

2.1 **Study Context**

2.1.1 AECOM was commissioned by the London Borough (LB) of Enfield to undertake an Employment Land Review (ELR) of the Borough. The ELR assesses the quantity, quality and viability of the Borough’s employment land to form an evidence base to support the review of LB Enfield’s Local Plan. The ELR will inform the future approach to the provision, protection, release and enhancement of employment land and premises.

2.1.2 Employment land is defined as land with business activities which operate from premises with B1, B2 and B8 use classes. Throughout this report employment land is referred to as:

- Offices comprising use classes B1a (office) and B1b (research and development or R&D) as these premises are often very similar in their operational requirements; and
- Industry comprising use classes B1c (light industry), B2 (manufacturing) and B8 (warehousing).

2.1.3 Within LB Enfield, employment land falls within the following areas as termed by regional and local planning policy:

- Strategic Industrial Locations
- Locally Significant Industrial Sites
- Town Centres; and
- Non-designated employment land.

2.1.4 All B-use class employment land measuring 0.25 ha or over was assessed in this study.

2.2 **Objectives**

2.2.1 The overarching objectives of the ELR are to assess the quantity and quality of the Borough’s current employment land supply provision and its suitability to continue to support B-use class employment activities against the future projected demand, and make conclusions to guide future policy making.

2.2.2 The main objectives of the ELR are to:

- Assess the quantity and quality of the Borough’s current employment land supply provision and its suitability to continue to support B-use class employment activities
- Assess the demand for B-use class employment space over the Local Plan period
- Compare the scale and qualitative characteristics of supply against forecast demand over the plan period, and
- Provide high level conclusions about employment land in the Borough.

2.2.3 Within these broad objectives are a number of specific points of consideration, including:

- Consider the statutory and strategic policy context for employment provision in the borough, with particular consideration given to how the policy approach can harness the benefits of economic growth, taking into account the wider strategic context including neighbouring local authorities and the rest of London
2.2.4 This ELR should consider primarily the designated employment areas in Enfield and justified with the Planning Practice Guidance (PPG), in particular paragraphs 30-34 of the section Housing and economic development needs assessments.

2.3 Approach

2.3.1 The approach to undertaking the ELR aligns with National Planning Policy Framework (NPPF) and Planning Policy Guidance (2016). The approach captured the following:

- A review of planning policy and relevant strategy documents which influence current and future land use
- An assessment of the local economy
- A survey of employment land supply in the borough
- A review of the commercial property market drawing upon CoStar data
- A forecast of the potential net additional demand arising over the Local Plan period; and
- A comparison of supply and demand to inform options and the Council’s future approach to employment land use planning provision.

2.3.2 The approach is reflected in the structure of the report. The research has been informed by consultation with property market agents and business stakeholders, which has been reflected in the findings throughout the report.

2.4 LB Enfield’s Functional Economic Market Area

2.4.1 A key upfront task is to determine the functional economic market area (FEMA) as this area provides a suitable geography to assess commercial market conditions and consider future demand arising.

2.4.2 The UK Planning Practice guidance outlines that ‘need’ should be assessed within the context of a Functional Economic Market Area (FEMA). The guidance does not offer a standardised method of how to define a FEMA. However, it does provide a list of indicators that can be used to help define FEMAs. These include

- “The extent of any Local Enterprise Partnerships (LEP) with the area
- Travel to work areas
- Housing market area
- Flow of goods, services and information within the local economy
- Service market for consumers
2.4.3 Census 2011 origin and destination data shows LB Enfield as having strong connections with the Central Activities Zone (CAZ), central London and neighbouring local authorities. Residents commute to the CAZ and central London, while the Borough's own workforce commutes in from the surrounding local authorities such as Broxbourne and Waltham Forest.

2.4.4 The residents likely use the Borough's strong rail connections to reach stations such as King's Cross and Liverpool Street in the heart of London. In the meantime, workers commuting to LB Enfield from neighbouring local authorities and goods being transferred to Enfield’s high number of distribution and logistics hubs will likely utilise the Borough’s access to strategic roads such as the A10 and North Circular.

2.4.5 LB Enfield’s travel to work flows and transport network access suggest that the Borough has a two part economic relationship, one part with the CAZ and Central London and the other with the local authorities surrounding it. However, other factors including the housing market LB Enfield is situated in and the similarities it shares with other local authorities in London suggest that its economic linkages are currently stronger with its neighbouring local authorities. Therefore, the Borough’s FEMA is found to consist of the following local authorities:

- Barnet
- Broxbourne
- Epping Forest
- Haringey
- Hertsmere
- Waltham Forest; and
- Welwyn and Hatfield.

2.4.6 Further analysis on LB Enfield’s FEMA can be found in Appendix A.
3. **Literature Review**

3.1 **Introduction**

3.1.1 This section of the ELR reviews literature and planning policy relevant to employment land and floorspace and the economy of LB Enfield. Literature and planning policy are covered at the national, regional and local level, focusing upon literature and planning policy published by public bodies.

3.2 **National Policy**

3.2.1 **National Planning Policy Framework (2012)**

3.2.1 In 2012 the National Planning Policy Framework (NPPF) was adopted, replacing the previous National Planning Policy Statements and National Planning Policy Guidance. The NPPF was created on the broad principles of simplifying the planning system and promoting sustainable growth through it.

3.2.2 The NPPF describes the Government’s vision for building a strong and competitive economy. It sets out a presumption in favour of sustainable development in the absence of a local plan or where the plan is silent or indeterminate. This means that the ELR and Local Plan should present robust evidence to support clearly defined allocations of land for employment to avoid applications for alternative uses being granted on the basis they are sustainable.

3.2.3 The NPPF recognises that the planning system plays an important role in promoting economic growth and building a strong, competitive economy. The NPPF sets guidelines for the preparation of local plans which includes setting out a clear economic vision and strategy; identifying strategic sites for investment; supporting existing businesses; and planning positively for the location, promotion and expansion of economic clusters. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow for a rapid response to changes in economic circumstances.

3.2.4 Between December 2015 and February 2016 the Department of Communities and Local Government (DCLG) consulted on potential changes to the NPPF. The proposed changes include amendments to paragraph 22 to make clear that un-viable and underused commercial and employment land should be released unless there is significant evidence to justify the continuing allocation of the land. The DCLG is currently waiting for the UK Government’s response to the consultation.

3.2.5 **Planning Policy Guidance (2016)**

3.2.5 In 2014 the Government published new Planning Practice Guidance (PPG) on ‘Housing and Economic Development Needs Assessments’ and ‘Housing and Economic Land Availability Assessments’ amongst others. This guidance replaces the Office of the Deputy Prime Minister (ODPM) Employment Land Reviews: Guidance Note (2004).
3.2.6 In economic development terms ‘need’ relates to the amount of economic development floorspace required based on a quantitative assessment and an understanding of the qualitative requirements of market segments. The PPG requires that the assessment of need is based on an objective assessment and unbiased evidence, and should not be constrained by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.

3.2.7 To provide an understanding of the underlying requirements for office, general business and warehousing sites the PPG emphasises the importance of considering projections (based on past trends) and forecasts (based on future scenarios). The PPG requires plan makers to consider sectoral and employment forecasts and projections, demographically derived assessments of future employment needs, past take-up of employment land and property and/or future property market requirements, consultation and studies of business trends and statistics.

3.2.8 The guidance emphasises the following points for employment land reviews:

- A need to take account of the wider ‘functional economic market area’ (the FEMA) in which the local authority operates
- A greater emphasis on business engagement to help understand current and future requirements for employment land
- Consideration of the opportunities for providing employment space as part of mixed-use developments
- Increased integration of employment land studies and housing land assessments (SHLAA and SHMA scopes of work) to ensure that sites are allocated for the most appropriate use
- A more in-depth assessment of the ‘achievability’ and deliverability/viability of development of available or pipeline sites
- A supply side appraisal of all employment sites over an updated (lower) size threshold of 0.25ha; and
- Greater consideration of the legal or ownership problems that may affect the availability of sites, and the ways to overcome them.

3.2.9 The PPG states the requirement for a call for sites exercise to be undertaken, whereby landowners and developers are asked to submit sites with prospective employment and non-employment use for consideration. This ELR follows the methodology set out in the PPG.

3.3 Regional Policy


3.3.1 The latest version of the London Plan was adopted in March 2016 by the Greater London Authority (GLA). The 2016 London Plan was created in response to changes in national housing and parking standards. The London Plan sets out an integrated social, economic and environmental framework for the development of London up to 2036.

---

3.3.2 The London Plan outlines the Mayor’s Vision and Objectives for sustainable development in London within six detailed objectives, outlining aspirations to 2036. Policies particularly relevant to employment, the economy and local development are:

- **Objective 1:** “A city that meets the challenges of economic and population growth in ways that ensure a sustainable, good and improving quality of life, emphasising the need for high quality homes and a reduction in inequality”, and

- **Objective 2:** “An internationally competitive and successful city with a strong and diverse economy and an entrepreneurial spirit that benefit all Londoners and all parts of London”.

- **Policy 2.6:** ‘Outer London Vision and Strategy’ outlines that the Mayor with other stakeholders such as Boroughs will work to realise the potential housed in Outer London. Local Development Frameworks (LDFs) and other development frameworks are expected to build upon the diversity and strengths of Outer London “to enhance and promote its distinct existing and emerging strategic and local economic opportunities, and transport requirements”.

- **Policy 2.7:** ‘Outer London Economy’ sets out the Mayor and relevant stakeholders should address the constraints and utilise the opportunities so that economic growth in Outer London can rise above long-term economic trends. The Plan seeks to do this through:
  - “Enabling existing sources of growth to perform more effectively;
  - **Identifying, developing and enhancing capacity to support both viable local activities and those with a wider than sub-regional offer, including strategic outer London development centres**
  - **Improving accessibility to competitive business locations (especially town centres and strategic industrial locations)**
  - **Providing strategic and local coordination within development corridors, including across the London boundary, to enhance competitive advantage and synergies for clusters of related activities and business locations**
  - **Consolidating and developing the strengths of outer London’s office market through mixed-use redevelopment and encouraging provision in competitive locations, including through the use of land use ‘swaps’; and**
  - **Managing and improving the stock of industrial capacity to meet both strategic and local needs, including those of small and medium firms (SMEs), start-ups and businesses requiring more affordable workspace including flexible, hybrid and office/industrial locations”**.

**Opportunity Areas and Areas for Intensification**

- **Policy 2.13:** ‘Opportunity Areas and Intensification Areas’ are the major reservoirs of brown field land in Greater London and are primed for further development. The Mayor within Opportunity Areas (OA) and Areas for Intensification (AFI) aims to provide encouragement, support and leadership to prepare and implement planning the growth potential of these areas. Development proposals within these areas should “contribute towards meeting (or where appropriate, exceeding) the minimum guidelines for housing and/or estimates for employment capacity”. LB Enfield is partly located within the Upper Lee Valley Opportunity Area (OA) which is estimated to have capacity for 20,100 net additional dwellings and 15,000 net additional jobs up to 2036.
Policy 2.16: ‘Strategic Outer London Development Centres’ outlines the Mayor with Boroughs and relevant stakeholders will "develop and promote strategic development centres in outer London or adjacent parts of inner London with one or more strategic economic functions of greater than sub-regional importance". All stakeholders will develop and activate “planning frameworks and/or other appropriate spatial planning and investment tools that can effect positive change to realise the potential of strategic outer London development centres”.

Town Centres

Policy 2.15: ‘Town Centres’ states that centres should be “the main foci beyond the Central Activities Zone for commercial development and intensification”. The London Plan defines Enfield Town as a ‘Major Centre’ with medium growth potential, while Angel Edmonton, Edmonton Green, Palmers Green and Southgate with medium growth potential.

Policy 4.7: ‘Retail And Town Centre Development’ indicates that Boroughs should:

- Identify future levels of retail and other commercial floorspace need (or where appropriate consolidation of surplus floorspace) in light of integrated strategic and local assessments
- Take a proactive partnership approach to identify capacity and bring forward development within or, where appropriate, on the edge of town centres; and
- Manage existing out of centre retail and leisure development in line with the sequential approach, seeking to reduce car dependency, improve public transport, cycling and walking access and promote more sustainable forms of development”.

Offices

Policy 4.2: ‘Offices’ outlines “the Mayor and boroughs and other stakeholders should:

- Support the management and mixed use development and redevelopment of office provision to improve London’s competitiveness
- Recognise and address strategic as well as local differences
- 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 for office based activities; and
- Monitor the impacts of government liberalisation of Permitted development rights for changes of use from offices to residential”.

Industrial Land

Policy 4.4: ‘Managing Industrial land and Premises’ states 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”. Monitoring and managed release of surplus industrial land can also contribute to strategic and local planning objectives such as new housing provision.

Housing

Policy 3.3: ‘Increasing Housing Supply’ recognises that there is a “pressing need for
more homes in London in order to promote opportunity and provide a real choice for all Londoners in ways that meet their needs at a price they can afford”. The London Plan aims for an additional 42,000 homes to be built annually in London to meet high demand. The annual target for the LB Enfield is to provide 791 net additional homes annually between 2015/16 and 2024/25.

### Future of the Plan

3.3.3 Due to the election of a new London Mayor in May 2016, a full review of the London Plan is set to begin with informal consultations between October and December 2016. Consultations on the draft of the new London Plan are expected to happen in autumn 2017, with the final version published in autumn 2019.

### Land for Industry and Transport Supplementary Planning Guidance (2012)

3.3.4 The GLA published the Land for Industry and Transport Supplementary Planning Guidance (SPG) in 2012. The aim of the SPG is to ensure there is sufficient land for the development of industry and the expansion of transport systems in the future.

3.3.5 The SPG emphasises that there is increasing demand for industrial land from a range of other industries, and a balance must be found between “retaining sufficient industrial land in appropriate locations and releasing land to other uses”. The SPG notes that “Strategic Industrial Locations and Locally Significant Industrial Sites should in general be protected, and release of industrial land through development management should generally be focussed on smaller sites outside of the SIL framework”. Outer London Boroughs are expected to manage and improve industrial capacity stock to meet local and strategic needs, especially those of SMEs, start-ups and firms that require affordable workspaces.

3.3.6 The SPG identifies six key principal property markets which include the Lee Valley. The Lee Valley property market consists of areas of the Lower Lee, Enfield and Haringey. Enfield among other Boroughs in the northern section of the Lee Valley are encouraged “to work with the GLA and other stakeholders to develop and implement policies, planning frameworks and other investment tools to realise the full potential of industrial locations”.

3.3.7 In Annex of the SPG industrial land release benchmarks are provided for all London Boroughs. All Boroughs are expected to release industrial land, except the City of London. LB Enfield is expected to release 33ha of industrial land between 2011 and 2031, equivalent to 1.7ha per annum. However,

3.3.8 Since the publication of the SPG, the London Industrial Land Supply and Economy (LILSE) study (2015, see below) has identified that from 2010-2015, 21.2ha of industrial land was released in LB Enfield, equivalent to a ratio of 4.24ha per annum, a rate of release significantly higher than the SPG benchmark.

3.3.9 A re-assessment of industrial land release benchmarks is presently being undertaken by the GLA and its consultants. Once complete, the assessment together with the (LILSE) will likely inform the preparation of a new updated SPG that may specify different benchmark rates of release for LB Enfield, potentially for different boroughs. This assessment is set to be published in summer 2017.

---

6 [https://www.london.gov.uk/london-plan-full-review/overview-full-review-london-plan](https://www.london.gov.uk/london-plan-full-review/overview-full-review-london-plan), accessed October 2016.
7 GLA, (2012); Land for Industry and Transport Supplementary Planning Guidance.
Greater London Industrial Land Supply and Economy Study (2015)

3.3.10 The London Industrial Land Supply and Economy Study was produced by AECOM and Cushman and Wakefield for the GLA to provide comprehensive analysis of London's supply of land in industrial and related uses such as warehousing for logistics, waste management, utilities, wholesale markets and vacant land (including time-series data for the 2001-2006-2010-2015 period)\(^8\). Backed by desk research, field surveys and Geographic Information System (GIS) mapping, the Study's purpose is to provide valuable input into the evidence base for the review of the London Plan, and other reports relating to industrial land. The Study assists the GLA, Transport for London (TfL), the London Boroughs, and other partners to implement a rigorous strategy for industrial land management and investment, and to plan, monitor and manage release of surplus land to contribute to strategic and local planning objectives.

3.3.11 The study found that there was 462.7 hectares (ha) of industrial land in LB Enfield in 2015. Out of the industrial land in LB Enfield:

- 146.5ha was occupied by industry and 169.4ha was occupied by warehouses, totalling 315.9ha of land in ‘core’ industrial use
- 122.4ha was occupied by wider industrial land uses (such as utilities and waste management facilities), and
- 24.3ha was vacant industrial land.


3.3.12 The GLA's London Office Policy Review provides information on the supply and demand for offices in London, and analysis of the operation of the office market and its relationship with planning policy\(^9\). The main findings of the 2012 report were that London had adjusted well to the difficult market conditions experienced since the downturn of late 2007 and 2008, and that the general outlook for the city’s future as a global financial centre is optimistic. The rate of growth in office jobs in the period to 2036 is projected to be around half the rate which has prevailed over the last two decades. However, the forecasts in the report were updated in 2014\(^10\). The 2014 forecasts are more positive than those from 2012, and project higher long-term growth rates. The 2014 update forecasts that LB Enfield will experience an increase in office jobs from 15,000 in 2011 to 21,000 in 2036, a total net expansion of 6,000 jobs.

3.3.13 An update to the London Office Policy Review has been commissioned by the GLA to take place in autumn 2016. The new Review once complete will supersede the 2012 and 2014 reports, acting as part of the evidence base for the upcoming full London Plan review.


3.3.14 The GLA in 2010 published a new Economic Development Strategy for Greater London\(^11\). The purpose of the strategy is to provide relevant stakeholders, public authorities and interested parties, with a vision for London's future, an analysis of the economy and policy directions for achieving its ambitions; and to clarify roles and responsibilities with other

---

\(^8\) GLA, (2015); Greater London Industrial Land Supply and Economy Study.
\(^9\) GLA, (2012); London Office Policy Review.
\(^10\) GLA, (2014); London Office Floorspace Projections.
partners who make a major contribution to developing London’s economy.

3.3.15 The strategy is framed around economic objectives which focus on: the promotion of London as a competitive business environment; attracting investment in infrastructure and regeneration; and retaining London’s position as a leading international centre of learning, creativity, and innovation. London’s strengths are highlighted in industries such as financial and business services, consulting, engineering, architecture, legal services, research and design and product development.


3.3.16 The Upper Lee Valley Opportunity Area Planning Framework (OAPF) was adopted by the GLA in July 2013. The eight objectives of the OAPF are as follows:

- “Growth at Tottenham Hale, Blackhorse Lane, Meridian Water in Central Leeside and Ponders End”
- Optimised development and redevelopment opportunities along the A10/A1010 Corridor
- Over 15,000 new jobs by 2031 across a range of industries and a green industrial hub creating greater learning and employment opportunities
- Over 20,100 new well designed homes by 2031
- Full integration between existing communities and the new jobs, homes and services provided as part of the new developments
- A Lee Valley Heat Network linked to Edmonton Eco Park
- Significant investment and improvements to transport infrastructure, including four trains per hour on the West Anglia Mainline and improvements to help people walk and cycle more easily through the area; and
- A fully accessible network of green and blue spaces which open up the Lee Valley Regional Park. The networks between them will be improved benefitting both people and wildlife”.

3.3.17 In LB Enfield Meridian Water and Ponders End are outlined by the OAPF as two of the key development areas in the Upper Lee Valley. Meridian Water is estimated to have capacity for up to 5,000 new homes and 3,000 additional jobs, while Ponders End as of publishing the OAPF was seeing the redevelopment of a vacant Middlesex University Campus into 400 new homes. Additionally, the LB Enfield in 2012 gave permission for the demolition and redevelopment of the Alma Housing Estate to replace the existing 717 dwellings with 750-1,000 new homes.


3.3.18 The London-Stansted-Cambridge Consortium (LSCC) is a partnership of local authorities and business interests in the corridor from London to Cambridge and Peterborough. It also includes the South East LEP, Hertfordshire LEP, London Enterprise Panel and Greater Cambridgeshire and Greater Peterborough LEP.

3.3.19 In 2014 the LSCC published the Agenda for Jobs, Growth and Improved Liveability prospectus which outlines how the economy could be further developed. The prospectus

---

13 London-Stansted-Cambridge Consortium (LSCC), (2014); An Agenda for Jobs, Growth and Improved Living.
highlights the potential of the area for strong economic growth due to the existing transport infrastructure and clusters of innovative business sectors such as life sciences in some locations along the Corridor.

3.3.20 Over the next 20 years the area is forecasted to generate 176,000 new jobs. It is estimated that 5,600,000sqm of new commercial space could be delivered, of which 315,000sqm could be in the North London sub-area where LB Enfield is located. Within the Borough Enfield Town Centre, Innova Park, Brimsdown and Ponders End and Meridian Water are designated as some of the key opportunity projects within the North London sub-area.

Transport for a World City (2016)

3.3.21 The National Infrastructure Commission in March 2016 published a report titled Transport for a World City\(^\text{14}\). In the report the Commission found the strategic case for Crossrail 2 is well founded and recommended that the project is taken forward to the next stage of developing it. The Commission also recommended that Crossrail 2 should be given priority over other transport schemes that are planned for Greater London, and that a hybrid bill for the scheme should be submitted to Parliament by 2019 for MPs to vote on.

3.3.22 The proposed route for Crossrail 2 at the moment runs north from Tottenham Hale along the WAML through LB Enfield into Hertfordshire. On the LB Enfield stretch of the line trains are planned to stop at Angel Road, Ponders End, Brimsdown and Enfield Lock stations. If the scheme is complete, commuters and general rail users travelling to and from the four stations will benefit from increased capacity and faster journey times into Central London.

3.3.23 In addition to improving public transport and rail services in LB Enfield, Crossrail 2 is expected to facilitate the development of 200,000 new homes, of which a proportion will likely be built within the Borough. This will likely stimulate the local construction industry, providing more jobs for local residents. However, it could also put pressure on other land uses near to stations such as strategic industrial land around Brimsdown.

3.4 Local Policy

Enfield Core Strategy (2010)

3.4.1 LB Enfield adopted the Core Strategy in 2010\(^\text{15}\). The Core Strategy is the overarching planning document in the Borough’s Local Development Framework, supported by others such as the Development Management Document\(^\text{16}\) and North East Enfield Area Action Plan (AAP)\(^\text{17}\). It sets out the Council’s vision for the Borough up to 2026 and beyond, providing “the broad strategy for the scale and distribution of development and the provision of supporting infrastructure”.

3.4.2 The Core Strategy outlines the Council’s spatial vision for 2026 is that “Enfield will be a prosperous and sustainable Borough with a strong sense of place and identity. It will be a place that people are proud to call home and want to invest in. Both the resident and working populations will grow, due to Enfield’s strategic position relative to two of the Government’s growth areas and the UK’s main economic driver, Central London”. The

---

\(^\text{14}\) National Infrastructure Commission, (2016); Transport for a World City.
\(^\text{15}\) London Borough of Enfield (LB Enfield), (2010); Core Strategy.
\(^\text{16}\) LB Enfield, (2014); Development Management Document.
\(^\text{17}\) LB Enfield, (2016); North East Enfield Area Action Plan.
vision is structured around ten objectives, of which the following are relevant to employment land:

- **Strategic Objective 1**: ‘Enabling and focusing change’ aims to meet the future needs of LB Enfield’s current and potential forthcoming population “by focusing transformational change and growth in the Upper Lee Valley, in existing town centres and new neighbourhoods”.

- **Strategic Objective 4**: ‘New homes’ seeks to “meet the housing needs identified in LB Enfield’s Housing Mark Assessment, improving existing housing stock, developing new housing, including mixed tenure”.

- **Strategic Objective 6**: “Maximising economic potential’ aims to “develop a spatial framework for a diverse and competitive economy in LB Enfield, maximising the economic potential of the Upper Lee Valley and town centres, enhancing appropriate employment locations and ensuring a more efficient use of land”.

- **Strategic Objective 7**: ‘Employment and Skills’ seeks to “support job creation and address the levels of unemployment and economic inactivity in the south and east of the Borough, including amongst young people and disadvantaged sections of the community”.

### 3.4.3 Policies from the Core Strategy relevant to employment land and the wider pressures upon it include the following:

- **Core Policy 1**: ‘Strategic Growth Areas’ outlines that the Council plans to focus development and growth in four specific areas of the Borough: Central Leeside; North East Enfield; Enfield Town; and “the area around the North Circular Road at New Southgate”.

- **Core Policy 13**: ‘Promoting Economic Prosperity’ points that the Borough will protect and enhance Enfield’s employment offer to enable the generation of 6,000 or more net additional jobs between 2010-2026. 4,000 or more jobs are to come from within the Upper Lee Valley and 2,000 or more in Enfield’s town centres.

- **Core Policy 14**: ‘Safeguarding Strategic Industrial Locations’, through this policy the Council will safeguard Strategic Industrial Locations (SIL) including: Freezywater; Innova Park; Brimsdown; Redburn Trading Estate; Meridian Business Park; Aztec 406; Edmonton Eco Park; Montagu Industrial Area; Eley’s Estate; Harbet road Industrial Area; and Great Cambridge Road and Martinbridge Trading Estate.

- **Core Policy 15**: ‘Locally Significant Industrial Sites’ outlines that the Council will safeguard Locally Significant Industrial Sites (LSISs) for a range of industrial uses if the sites continue to meet demand and meet the requirements of modern businesses. The LSISs include: Alma Industrial Estate; Claverings Industrial Estate; Montagu Industrial Area; Commercial Road and North Middlesex Estate; Langhedge Lane Industrial Estate; Queensway Area; New Southgate Industrial Area; Regent’s Avenue Area; and Oakthorpe Dairy.

- **Core Policy 17**: ‘Town Centres’ aims to “strengthen the role of Enfield’s town centres by focusing new commercial, retail, leisure, office, residential and other appropriate social infrastructure related uses”. Enfield Town which is designated as a ‘Major Centre’ by the London Plan will continue to be “supported as the main destination for comparison goods shopping, and also the main centre for leisure, entertainment and cultural activities, as well as office uses”.

- **Core Policy 19**: 'Offices' outlines that the Council will "protect and enhance Enfield Town as the main location in the Borough for new office development with particular emphasis on accommodating office floorspace around Enfield station, as well as the renewal and modernisation of existing offices".
Core Policy 37: ‘Central Leeside’ points ‘the majority of the Central Leeside area will retain its industrial and employment character’. SILs and LSISs will be retained and intensified. “Where opportunities arise, the commercial stock will be renewed and modernised and transport accessibility improved”.

Core Policy 38: ‘Meridian Water’ outlines the Council’s objective of developing 5,000 new homes, 1,500 new jobs and the accompanying infrastructure within the Meridian Water boundary by 2026. Where there the opportunity present adjacent employment areas including Harbet Road Industrial Estate will be upgraded “to complete transformation in the Meridian Water Area”.

Core Policy 39: ‘Edmonton’ sets out that “further housing, shops and employment will be needed to reinforce and enhance the identity of the area, its role as a District Centre and to help implement socio-economic change through the provision of training facilities, employment opportunities and to create a better mix of tenures”.

Core Policy 40: ‘North East Enfield’ outlines the Council aims to enhance the reputation of North East Enfield as a competitive business location, with important SILs such as Brimsdown and Freezywater retained, “with the latter expanded to include Innova Park”. Ponders End is identified as having the potential to have up to 1,000 new dwellings developed within the area by 2026.

Core Policy 42: ‘Enfield Town’ sets out the town centre has the potential to accommodate 500 additional dwellings as well as a proportion of the retail growth that the Borough is projected to experience.

Core Policy 44: ‘North Circular Area’ outlines that the Council believes there is capacity within the North Circular Area for 2,000 new homes. The focus of development around in the Area will be around New Southgate, incorporating the Ladderswood Estate and New Southgate Industrial Estate. Improvements to local centres in the area will see an expansion of commercial space in them.

3.4.4 LB Enfield is currently developing a new Local Plan which once adopted will replace the current Core Strategy and other Development Plan Documents. A public consultation was held between December 2015 and February 2016 on options for the Local Plan. The Council is now developing more detailed options for planning policy choices. A Call for Sites has also been carried out and the suggested sites are now being assessed as part of developing options of the Plan18.


3.4.5 The Development Management Document was adopted by LB Enfield in November 201419. It forms part of the Local Development Framework, providing detailed criteria for which planning applications will be determined on, building upon the vision contained within the Core Strategy. The following policies from the development Management Document are relevant to employment land and this ELR:

- DMD 19: ‘Strategic Industrial Locations’ sets out that “only proposals involving general industrial, light industrial, storage and distribution, waste management, recycling, some transport related functions, utilities and other industrial related activities, including green industries and management of waste, will be permitted within Preferred Industrial Locations (PIL). Proposals involving a loss of capacity will be refused”.

- DMD 20: ‘Locally Significant Industrial Sites’ outlines “proposals involving the loss of

---


industrial uses within LSIS will be refused, unless it can be demonstrated that the
development site is no longer suitable and viable for its existing or alternative
industrial use in the short, medium and long term. If this can be demonstrated then a
change of use from industrial may be accepted if the proposed use does not
compromise the primary function of the LSIS and a significant amount of
business/industrial uses are contained within the development.

- DMD 21: ‘Complementary and Supporting Uses within SIL and LSIS’, through the
policy the Council allow small scale walk-to services in SIL and LSIS. This includes
services such as crèches and cafes to serve the needs of the industrial occupiers.
Retail services will be accepted if it is not the primary function of the space.

- DMD 22: ‘Loss of Employment Outside of Designated Areas’ outlines that proposals
that lead to a loss of employment land outside of SIL and LSIS will be denied, unless
the developer can demonstrate "that the site is no longer suitable and viable for
continued employment use”.

- DMD 23: ‘New Employment Development’ sets out that new industrial development
within SIL and LSIS will be permitted if the accommodation is flexible to meet future
business needs, environmental impacts are limited and environmental effects such as
noise and disturbance on the area is limited. Proposals for new industrial/warehousing
outside of SIL and LSIS will be permitted only if the development will have no adverse
effects on the surrounding area and demand for industrial floorspace is expected to
continue.

- DMD 24: ‘Small Businesses’ proposals including "the loss of units less than 50sqm
suitable for start-ups and small businesses will be refused. The provision of small
business units will be sought as part of proposals for the redevelopment of an
existing employment-generating site and as part of mixed use schemes, in
appropriate locations”.

- DMD 25: ‘Locations for New Retail, Leisure and Office Development’ sets out that the
main bulk of comparison goods shopping, food and drink uses and large scale office
and leisure development will be permitted in Enfield’s four district centres (Angel
Edmonton, Edmonton Green, Southgate and Palmers Green) and Enfield Town.

Enfield Employment Land Review (2012)

3.4.6 The previous Enfield ELR was published in 2012. The ELR assessed the future demand
and supply of employment floorspace in LB Enfield, “whilst assessing the suitability of
existing and proposed employment floorspace in terms of its ability to meet future
demand”. The study was designed to inform the Council’s Local Plan and provide planning
guidance for future planning policy development.

3.4.7 The ELR found that there had been growth in demand for distribution and logistics space
and reduction in demand. Businesses from Central and Inner London were relocating to LB
Enfield and other Outer London Boroughs due to the significant decrease in the amount of
industrial land available there, while land release up to the publication of the ELR had been
at a lower rate. Overall, the ELR recommends that the Council “could ideally” allocate new
development sites for development of employment space, identify new land and consider
any windfall sites for new employment space within constraints. The employment space
would likely be warehousing for distribution and logistics. However, the ELR does note that
the Council is concerned about the potential for more warehousing to overburden the
Borough’s infrastructure.

---

20 LB Enfield, (2012); Enfield Employment Land Review.
3.4.8 In regard to offices, the ELR found that demand for new offices in the market was low at the time of the ELR’s publication and that the market was not likely in the future to significantly pick-up. Any future development was expected to happen through small office developments in LB Enfield’s town centres or in the local centres included as part of large mixed-use regeneration schemes such as Meridian Water.

Enfield Industrial Estates Strategy (2014)

3.4.9 The final version of the Enfield Industrial Estates Strategy was published in 2014. The strategy acts as the framework to enable the Council’s vision for the Upper Lee Valley. The main goal of the strategy is “to ensure that the industrial estates assets of the Borough are used to their full potential to achieve economic growth and prosperity for businesses in Enfield and to provide stable and well-paid employment opportunities for Enfield’s residents”. To deliver the goal the strategy includes four strategic objectives:

- SO1: Maximise operational effectiveness of existing estates;
- SO2: Create the conditions for growth;
- SO3: Build the Enfield offer; and
- SO4: Ensure Enfield residents share in the growth.

3.4.10 An action plan is included as part of the strategy to deliver the four objectives. The measures in the action plan include: enhancing the strategic highway network through a new link to M25 junction 26; “develop a targeted approach to support and promote the development of key growth sectors; and develop the growth in the number of new enterprises to allow for increased flexibility in developing new products and entering new markets”.

Enfield Retail and Town Centre Study (2014)

3.4.11 The aim of LB Enfield’s Retail and Town Centre Study (2014) is to act as part of the evidence base for the Council’s emerging planning policy. It provides review of current retail and leisure floorspace supply, and a quantitative and qualitative review of demand for additional retail, leisure and other town centre uses in the Borough.

3.4.12 The study found that up to 2024 there is likely a surplus of convenience good expenditure which could support an additional gross 9,206sqm of convenience goods floorspace, and by 2029 14,414sqm gross of convenience goods floorspace. By 2029 across the Borough additional comparison goods spending is forecast to have the potential to support 38,194sqm of comparison goods floorspace across the Borough. An additional 13,259sqm of food and beverage (A3-5) is also estimated to be required by 2029.

North East Enfield Area Action Plan (2016)

3.4.13 The North East Enfield AAP was adopted in June 2016 by the Borough. The purpose of the AAP “is to guide future investment and development, culminating in the wholesale regeneration of the area”. The objectives of the AAP are:

- “Long term coordinated planning for growth;
Employment growth and the local economy;
- Sustainable neighbourhoods;
- Maximising value of natural assets; and
- Infrastructure investment”.

3.4.14 The AAP includes a number of policies relevant to employment land and the industrial estates located with North East Enfield. These include:

- Policy 6.1: ‘Improving Existing Industrial Areas’ outlines that “a coordinated approach is required to ensure that existing industrial areas are kept at pace with the demands of businesses and take s advantage of the area’ position within the London-Stansted-Cambridge Corridor”. Development of new or redevelopment of old industrial space within SILs and LSISs will be permitted.

- Policy 6.2: ‘Improving the Great Cambridge Road and Martinbridge trading Estate’ sets out that “the Cambridge Road and Martinbridge Trading Estate is the only industrial business park in North East Enfield”. Development of other uses within it will not be permitted unless they are complementary to the overall operation of the business park.

North Circular Area Action Plan (2014)

3.4.15 The North Circular AAP (2014) “sets out the planning framework for the future of the North Circular corridor between the A109 at Bounds Green and A10 Great Cambridge Road”24. The AAP is designed to enable “a step change for the area, supporting and guiding regeneration that will lift decades of uncertainty”. An objective of the AAP is to provide new employment opportunities. These opportunities will be delivered through new employment development in Arnos Grove/New Southgate.

Central Leeside Area Action Plan (2014)

3.4.16 In 2014 LB Enfield approved a draft AAP for the Central Leeside area and submitted it to the Government for examination25. The Borough is now working to update the AAP to take into account the updated London Plan housing target for the Borough26.

3.5 Employment Land Policy of FEMA Local Authorities

3.5.1 LB Enfield’s FEMA is assumed to consist of eight local authorities (Barnet, Broxbourne, Epping Forest, Haringey, Hertsmere, Redbridge, Waltham Forest and Welwyn and Hatfield. The growth ambitions of the FEMA local authorities and forecasts for their future employment land needs are presented below in Table 3-1.

---

### Table 3-1 Neighbouring Local Authority Economic Objectives and Employment Land Positions

<table>
<thead>
<tr>
<th>Local Authority</th>
<th>Documents</th>
<th>Objectives</th>
<th>Employment Land Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barnet</td>
<td>Core Strategy 2012; Employment land Review (2009)</td>
<td>The Borough wishes to deliver 21,000 new jobs in its major regeneration areas by 2025/26. These include the Colindale/ Burnt Oak and Cricklewood/ Brent Cross London Plan OAs.</td>
<td>Barnet’s Employment Land Review forecasts the Borough will need from 1.5-13.5ha of new employment land between 2009 and 2026. Most future employment land demand is expected to come from growth in B1 jobs, with demand decreasing for B2 premises. LB Barnet are preparing a new ELR for publication later in 2017.</td>
</tr>
<tr>
<td>Haringey</td>
<td>Local Plan: Strategic Policies (2013); Employment land Study (2015)</td>
<td>LB Haringey’s Local Plan outlines that the Borough expects new jobs to come forward in growth areas such as 1,500 jobs in the Wood Green/ Haringey Heartlands AFI and a substantial number in Tottenham Hale. Current B use floorspace will be protected to help meet forecast demand for an additional 137,000sqm B use floorspace by the end of the Plan period.</td>
<td>The Employment Land Study forecast that LB Haringey will require from 48,800sqm to 102,600sqm of B1a/b floorspace between 2011 and 2031, equating to a minimum of 8ha of land. B1c/B2 employment is expected to decline and B8 to increase. However, given the lack of sites in the Borough, further growth in B8 floorspace is considered to be unlikely.</td>
</tr>
<tr>
<td>Redbridge</td>
<td>Local Plan: Pre-Submission Draft (2015); Employment Land Review (2016)</td>
<td>The Borough’s draft Local Plan includes jobs targets for a number of large sites such as Ilford Town Centre (2,000), Crossrail Corridor (2,000), Gants Hill (500) and Barkingside (200). The Council hopes in Ilford that the 2,000 new jobs can be delivered through an additional 20,000sqm of office floorspace in the town centre.</td>
<td>Redbridge’s 2026 Employment Land Review forecasts that based upon the most recent GLA employment projections for the Borough at time of publishing was going to need to 20.32ha of new employment land by 2031 and 23.55ha by 2036. The majority of the land will be for B8 uses. However, if historic development rates continue from 7.54ha to 18.1ha of employment land could be lost by 2036.</td>
</tr>
<tr>
<td>Local Authority</td>
<td>Documents</td>
<td>Objectives</td>
<td>Employment Land Position</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------</td>
<td>------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Core Strategy (2013); Employment Land Study (2009)</td>
<td>No overall jobs target is set in the Core Strategy. However, it does outline that Blackhorse Lane has additional capacity for 1,000 new jobs. The Core Strategy also notes that the Council wants to move the Borough’s economy from being reliant on the manufacturing and public service sectors, and towards well-paid, higher-skilled jobs which through up-skilling can be taken by current residents.</td>
<td>LB Waltham Forest’s Employment Land Study forecasts that between 2009 and 2026 and Borough will need from 3.1 to 3.7ha of B1 land and -24.5 to -11.1ha of B2/B8 use land.</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>Draft Local Plan (2016); Employment Land Study (2016)</td>
<td>The Draft Local Plan outlines the Council has concluded that there is the need to plan for at least 7,500 new jobs. The TwentyFive25 and Brookfield sites are expected to deliver the majority of these jobs (4,500 jobs and 3,000 jobs respectively). The Council would like the majority of these jobs to be in knowledge-based, high-value sectors.</td>
<td>The latest Employment Land Study forecasts that Broxbourne will experience net demand for 17,500sqm of B1a/b use floorspace, 160,700sqm of B8 use floorspace (35.7ha of land) and 41,500sqm of B1c/B2 use floorspace (9.2ha of land).</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>Issues and Options for the Local Plan Consultation Document (2012); Employment Land Review (2010)</td>
<td>Epping Forest Council is currently consulting on a new Local Plan. The most recent Issues and Options document sets the option of bringing forward 3,960 new jobs up to 2033, based upon the now defunct East of England Plan (2011).</td>
<td>The 2010 Employment Land Review forecasts that the District will need 66,000 sqm (up to 8.7ha) of employment floorspace to meet future demand up until 2031. The majority of this floorspace is expected to be B1a, but there is also potential for B1c and B2 floorspace demand to increase based upon the business survey that was done as part of the Employment Land Review.</td>
</tr>
<tr>
<td>Haringey</td>
<td>Local Plan: Strategic Policies (2013); Employment land Study (2015)</td>
<td>LB Haringey’s Local Plan outlines that the Borough expects new jobs to come forward in growth areas such as 1,500 jobs in the Wood Green/ Haringey Heartlands AFI and a substantial number in Tottenham Hale. Current B use floorspace will be protected to help meet forecast demand for an additional 137,000sqm B use floorspace by the end of the Plan period.</td>
<td>The Employment Land Study forecast that LB Haringey will require from 48,800sqm to 102,600sqm of B1a/b floorspace between 2011 and 2031, equating to a minimum of 8ha of land. B1c/B2 employment is expected to decline and B8 to increase. However, given the lack of sites in the Borough, further growth in B8 floorspace is considered to be unlikely.</td>
</tr>
<tr>
<td>Local Authority</td>
<td>Documents</td>
<td>Objectives</td>
<td>Employment Land Position</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>Local Plan Core Strategy DPD (2013); Hertfordshire London Arc Jobs Growth and Employment Land (2009)</td>
<td>Hertsmere’s Core Strategy through Policy CS8 will provide at least 110ha of land designated for the development of B-use class floorspace within the Borough.</td>
<td>Hertfordshire County Council’s London Arc Jobs and Employment Land (2009) study forecasts that Hertsmere will require 36,677sqm of net additional office floorspace to support 2,038 new office jobs between 2006 and 2026. Industrial and warehouse jobs are forecasts to decrease over the same time period by -1,572.</td>
</tr>
<tr>
<td>Welwyn and Hatfield</td>
<td>Draft Local Plan Proposed Submission (2016); Economy Study Update (2016)</td>
<td>The Council’s draft Local Plan’s creating 16,900 new jobs over the course of the plan period up to 2032. This includes developing at least 116,400sqm of new floorspace for new office, industrial and warehouse jobs.</td>
<td>Between 2013 and 2032 the Economy Study Update forecasts that Welwyn and Hatfield will need the following areas of land to meet demand for employment land: 8ha for B1a/b uses; 2ha for B1c uses; and 16ha for B8 uses. Demand for B2 uses is forecast to decrease.</td>
</tr>
</tbody>
</table>

Source:
Barnet, (2009); Employment Land Review; Barnet, (2012); Barnet’s Local Plan (Core Strategy): Development Plan Document
Broxbourne, (2016); Employment Land Study; Broxbourne, (2016); Draft Local Plan
Epping Forest and Brentwood, (2010); Employment Land Review; Epping Forest, (2012); Issues and Options for the Local Plan: Consultation Document
Harlingey, (2015); Employment Land Study; Harlingey, (2013); Local Plan: Strategic Policies
Hertfordshire County Council, (2009); Hertfordshire London Arc Jobs Growth and Employment Land
Hertsmere, (2013); Core Strategy: Development Plan Document; Waltham Forest, (2009); Employment Land Study
Waltham Forest, (2013); Core Strategy; Welwyn and Hatfield, (2016); Economy Study Update;
Welwyn and Hatfield, (2016); Draft Local Plan Proposed Submission.
3.5.2 Table 3-1 shows that the FEMA local authorities, like LB Enfield, have aspirations for economic growth in the future. Across the local authorities the general trend is that they have ambitions to increase the number of office jobs within their boundaries. The employment forecasts in their ELR’s generally support that they will experience expansions in office job numbers, and therefore require more office floorspace. The ELR’s for most authorities demand in the future will increase for land and floorspace dedicated to B8 use businesses.

3.6 Summary

3.6.1 The NPPF replaced PPSs as of March 2012 with the aim to make the planning system less complex and to promote sustainable growth. The NPPF recognises that the planning system plays an important role in promoting economic growth and building a strong, competitive economy. Key regional policy on employment land-use is contained in the London Plan (2016) and GLA Land for Industry and Transport SPG (2012). The London Industrial Land Supply and Economy Study and the demand assessment currently being prepared by the GLA are likely to inform a revised approach to the management of industrial land, a new SPG with benchmark release rates and a revised London Plan.

3.6.2 The London Plan sets out its vision for the North London sub-region, of which LB Enfield is a part. The centre of the vision is on optimising the development of its Opportunity Areas; tackling barriers to work and social exclusion; managing the release of surplus industrial land; and planning effectively for sustainable economic growth, including in sectors of new and emerging technologies. The Borough’s location in the centre of the LSCC means that it has the potential to take advantage of these sectors in the future.

3.6.3 At the local level LB Enfield adopted the Core Strategy in 2010. The Strategy is the overarching planning policy document in the Council’s LDF and sets out the Council’s vision for the Borough up until 2026. A number of other documents in the LDF support in the Core Strategy. These include the Development Management Document, North East Enfield AAP and North Circular AAP. In addition to the current LDF, the Council is preparing a new Local Plan and Central Leeside AAP. All documents present the Council’s vision for the Borough as one that has potential for growth, taking advantage of the Borough’s largest opportunities and strengths such as Meridian Water, its large stock of industrial land and strategic location in the Upper Lee Valley OA.

3.6.4 Overall, the literature and planning policy review has emphasised the need for LB Enfield to plan ahead to unlock the Borough’s key regeneration opportunities, maximise its locational advantage and efficiently utilise its current employment land stock to break from previous growth trends.
4. **The Local Economy**

4.1 **Introduction**

4.1.1 This section profiles the economy of LB Enfield using a number of key socio-economic indicators. The analysis informs an understanding of the Borough’s economic strengths and weaknesses that may impact upon demand for employment land and premises. Key indicators profiled include:

- Population, including the working population, and skill and occupational profile of residents
- Commuting patterns
- The workplace economy, by business stock and size, and
- Workplace employment by industry sector.

4.1.2 To provide a comparative assessment LB Enfield is benchmarked against FEMA and London averages when relevant.

4.2 **Population**

4.2.1 Demand for employment sites and premises will be driven in part by trends in the size of the resident population.

4.2.2 The latest published population estimates show that LB Enfield has grown from 302,000 residents in 2009 to 328,400 in 2015 – an 8.7% increase over the six years. This is in line with the FEMA average increase of 8.7%, but slightly lower than the Greater London rate of 9.2% over the period. GLA population projections for LB Enfield suggest that by 2037 the Borough’s population will grow by approximately 67,800 to 396,176. The implication of this is a likely expansion in demand for housing, community facilities, infrastructure and employment land and floorspace over the Local Plan period.

4.3 **Workforce and employment**

4.3.1 Statistics from the Office for National Statistics (ONS) show that in 2015 LB Enfield had approximately 210,300 working age residents (men and women aged 16 to 64), which represent approximately 64.0% of the resident population. This proportion is slightly lower than the London-wide and FEMA averages (68.1% and 65.6% respectively).

4.3.2 ONS record that 160,900 (76.5%) of LB Enfield’s working age residents are economically active, with 152,900 in employment. The proportion of working age residents is lower than Greater London as a whole (77.7%) but is in line with the FEMA (76.2%). The slightly lower rate of economic activity in LB Enfield compared to Greater London could be explained by the high rate of students over 16 years old, which represent 31.3% of the working-age population being economically inactive.

---

27 Even though the FEMA area will be defined later on within this ELR, it makes sense in terms of benchmarking and socio-economic profile to compare Enfield and its FEMA.


29 ONS, (2016); Mid-year Population Estimates 2015.
4.4 Earnings

4.4.1 The Annual Survey of Hours and Earnings (ASHE) (2016) records that in 2015 the median gross weekly earnings of LB Enfield residents as £564, which is respectively £34 and £57 lower than the average earnings by FEMA and Greater London residents. ASHE records the median gross weekly earnings of people working in LB Enfield as £527. The earnings differential in favour of jobs located outside of the Borough reflect the out commuting of residents to better paid jobs. Further details are shown in Table 4-1.

Table 4-1 LB Enfield Resident and Workplace Earnings 2015

<table>
<thead>
<tr>
<th>Median Gross Weekly Earnings Type</th>
<th>LB Enfield (£)</th>
<th>Greater London (£)</th>
<th>FEMA (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident</td>
<td>564</td>
<td>621</td>
<td>598</td>
</tr>
<tr>
<td>Workplace</td>
<td>527</td>
<td>660</td>
<td>556</td>
</tr>
</tbody>
</table>


4.5 Skills and Training

4.5.1 LB Enfield residents generally hold lower qualification levels in comparison to the rest of Greater London, but have similar qualification levels to the FEMA. In the Borough 80.9% of working age residents hold GCSEs and 41.0% are educated to a degree level or higher (National Vocational Qualification (NVQ) 4+). This is in line with the FEMA (39.8%) but significantly lower than London as a whole (49.8%). However, the proportion of residents with no qualifications in LB Enfield is similar Greater London (7.7% and 7.4% respectively). Further information is presented in Table 4-2.

Table 4-2 Population Qualifications Profile

<table>
<thead>
<tr>
<th>Qualification Level</th>
<th>LB Enfield (%)</th>
<th>Greater London (%)</th>
<th>FEMA (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NVQ4+</td>
<td>41.0</td>
<td>49.8</td>
<td>39.8</td>
</tr>
<tr>
<td>NVQ3+</td>
<td>13.5</td>
<td>14.7</td>
<td>16.2</td>
</tr>
<tr>
<td>NVQ2+</td>
<td>12.0</td>
<td>11.6</td>
<td>14.5</td>
</tr>
<tr>
<td>NVQ1+</td>
<td>14.4</td>
<td>8.0</td>
<td>11.0</td>
</tr>
<tr>
<td>Other Qualifications</td>
<td>11.7</td>
<td>8.5</td>
<td>10.7</td>
</tr>
<tr>
<td>No Qualifications</td>
<td>7.7</td>
<td>7.4</td>
<td>7.7</td>
</tr>
</tbody>
</table>

Source: ONS, (2016); Annual Population Survey (January 2015 to December 2015). Note: figures may not sum due to rounding.

4.6 Occupational Classifications

4.6.1 Table 4-3 sets out the occupations of LB Enfield residents compared with London and FEMA averages. The following points are observed:

- Standard Classification of Occupation (SOC) 2010 major group 1-3: This group has the strongest skills base and accounts for the largest number of residents by
occupation in LB Enfield. The proportion of the resident workforce who holds such positions (42.8%) is however under the London (52.8%) and FEMA (49.0%) averages. In particular, the associate professional and technical occupations are under-represented in the Borough, accounting for 12.1% of the working population compared to 17.2% in Greater London and 15.4% in the FEMA.

- SOC 2010 major group 4-5: The proportions of LB Enfield’s residents (18.6%) in employment who hold these levels of occupations are slightly above the London average (17.7%), but lower than the FEMA (21.9%).

- SOC 2010 major group 6-9: Combined 38.5% of LB Enfield’s workforce is employed in these occupation groups, significantly higher than in Greater London (29%) and FEMA (29.0%). All four categories are over-represented in the Borough. The largest difference is in caring, leisure and other service occupations, with 12.4% of LB Enfield’s workforce employed in it versus 8.1% in Greater London and 7.9% in the FEMA.
### Table 4-3 Resident Employment by Occupation Category, 2015

<table>
<thead>
<tr>
<th>SOC Group</th>
<th>Occupation</th>
<th>LB Enfield</th>
<th>Greater London</th>
<th>FEMA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Actual</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>1</td>
<td>1 Managers, directors and senior officials</td>
<td>13,600</td>
<td>8.7</td>
<td>11.6</td>
</tr>
<tr>
<td></td>
<td>2 Professional occupations</td>
<td>34,200</td>
<td>22.0</td>
<td>24.0</td>
</tr>
<tr>
<td></td>
<td>3 Associate professional &amp; technical</td>
<td>18,900</td>
<td>12.1</td>
<td>17.2</td>
</tr>
<tr>
<td>2</td>
<td>4 Administrative &amp; secretarial</td>
<td>13,900</td>
<td>8.9</td>
<td>10.0</td>
</tr>
<tr>
<td></td>
<td>5 Skilled trades occupations</td>
<td>15,100</td>
<td>9.7</td>
<td>7.7</td>
</tr>
<tr>
<td>3</td>
<td>6 Caring, leisure and Other Service occupations</td>
<td>19,300</td>
<td>12.4</td>
<td>8.1</td>
</tr>
<tr>
<td></td>
<td>7 Sales and customer service occupations</td>
<td>13,900</td>
<td>8.9</td>
<td>6.8</td>
</tr>
<tr>
<td>4</td>
<td>8 Process plant &amp; machine operatives</td>
<td>10,000</td>
<td>6.4</td>
<td>4.4</td>
</tr>
<tr>
<td></td>
<td>9 Elementary occupations</td>
<td>16,800</td>
<td>10.8</td>
<td>9.7</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>155,700</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>


### 4.7 Travel to Work

#### 4.7.1 The most recent data on travel to work patterns is provided through origin-destination statistics collated from the Census in 2011. While the statistics may be over five years old, the figures provide a good indication of the commuting patterns of residents and workers into and out of LB Enfield.

#### 4.7.2 Of LB Enfield’s residents currently in employment, 33.7% live and work in the Borough. The most popular workplace destination outside the Borough for residents are the City of Westminster and City of London (12.4%), followed by the neighbouring boroughs of Haringey (9.2%) and Barnet (6.0%), and the inner London boroughs of Camden (5.7%) and Islington (5.0%). Furthermore, approximately 9.1% of the Borough’s residents mainly

---

30 SOC designate the 2010 “Standard Classification of Occupation”

31 ONS, (2011); Census
worked at or from home, while 10.9% had no fixed location of employment.

4.7.3 Table 4-4 presents data on the top ten employment destinations of LB Enfield’s residents, which represent where 82.9% of the Enfield’s residents work. The other 17.1% of residents who are employed work elsewhere in other parts of London and the UK.

Table 4-4 Top 10 Employment Destinations for LB Enfield Residents

<table>
<thead>
<tr>
<th>Local Authority</th>
<th>Proportion of Residents (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enfield</td>
<td>33.7</td>
</tr>
<tr>
<td>City of Westminster (inc. City of London)</td>
<td>12.4</td>
</tr>
<tr>
<td>Haringey</td>
<td>9.2</td>
</tr>
<tr>
<td>Barnet</td>
<td>6.0</td>
</tr>
<tr>
<td>Camden</td>
<td>5.7</td>
</tr>
<tr>
<td>Islington</td>
<td>5.0</td>
</tr>
<tr>
<td>Hackney</td>
<td>2.7</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>2.5</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>2.0</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>2.0</td>
</tr>
<tr>
<td>Southwark</td>
<td>1.7</td>
</tr>
<tr>
<td>Total</td>
<td>82.9</td>
</tr>
<tr>
<td>Other destinations not listed above</td>
<td>17.1</td>
</tr>
</tbody>
</table>

Source: ONS, (2011); Census.

4.7.4 Analysis of the Borough’s workforce in terms of the origin of commuting provides an indication of Enfield’s labour market catchment. The local authorities with the four largest borders with Enfield (Barnet, Broxbourne, Haringey and Waltham Forest) provide the four highest proportions of workers (6.4%, 6.3%, 5.7% and 4.4% respectively). Further details are presented in the table below.

Table 4-5 Workers of Enfield Commuting from Elsewhere

<table>
<thead>
<tr>
<th>Workplace</th>
<th>Number of Commuters</th>
<th>% Total Residents Commuting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broxbourne</td>
<td>5,002</td>
<td>6.4</td>
</tr>
<tr>
<td>Haringey</td>
<td>4,954</td>
<td>6.3</td>
</tr>
<tr>
<td>Barnet</td>
<td>4,457</td>
<td>5.7</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>3,422</td>
<td>4.4</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>1,806</td>
<td>2.3</td>
</tr>
</tbody>
</table>

Source: ONS, (2011); Census.

4.7.5 The patterns of commuting to and from Enfield suggest that the Borough’s economy is interlinked with the Central Activities Zone (CAZ), central London and the local authorities.
which neighbour it. However, given that the Borough's businesses are quite reliant on labour from neighbouring local authorities, the patterns do suggest that Enfield's own economy is more reliant upon knowledge and information from neighbouring local authorities and not central London.

4.7.6 The job density rate for both LB Enfield and the FEMA is estimated at 0.61 jobs per resident compared to 0.96 for Greater London and 0.83 for England\textsuperscript{32}. The difference in job density suggests that LB Enfield and the FEMA local authorities on average are more residentially significant than economically.

4.8 Business

Stock and Scale

4.8.1 ONS business registration statistics shows there were 11,445 enterprises in LB Enfield during 2015. Micro-businesses (defined as companies employing up to nine employees) represent 93.0% of all enterprises in LB Enfield, which is in line with the FEMA average (92.9%) and slightly under than in Greater London (90.1%). There are a total of 125 medium scale businesses (employing 50 to 249 employees) and 25 large businesses (employing more than 250 employees). Further information is shown in Table 4-6.

Table 4-6 Businesses by Size Band

<table>
<thead>
<tr>
<th>Enterprise Size</th>
<th>LB Enfield</th>
<th>Greater London</th>
<th>FEMA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of Enterprises</td>
<td>Proportion of Total (%)</td>
<td>Proportion of Total (%)</td>
</tr>
<tr>
<td>1 to 9 (Micro)</td>
<td>10,530</td>
<td>92.0</td>
<td>90.1</td>
</tr>
<tr>
<td>10 to 49 (Small)</td>
<td>765</td>
<td>6.7</td>
<td>8.0</td>
</tr>
<tr>
<td>50 to 249 (Medium)</td>
<td>125</td>
<td>1.1</td>
<td>1.5</td>
</tr>
<tr>
<td>250 + (Large)</td>
<td>25</td>
<td>0.2</td>
<td>0.4</td>
</tr>
<tr>
<td>Total</td>
<td>11,445</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: ONS, (2015); Business Counts

Business Birth and Death

4.8.2 Enterprise births and deaths rates for LB Enfield provide an indication of the entrepreneurial characteristics and dynamics of the Borough.

4.8.3 In 2014, 2,305 enterprises were created in Enfield, which represented a business birth rate of 19.1%, in line with the Outer London average of 19.0%. In comparison, the business death rate for the same year amounted to 12.5% in LB Enfield, above the Greater London average (11.4%). The 4-year survival rate for firms born in Enfield during 2010 was 46.9%, slightly above Greater London (45.8%)\textsuperscript{33}.

\textsuperscript{32} ONS, (2014); Job Density.
\textsuperscript{33} ONS, (2015); Business Demography.
4.9 Employment Sectors

4.9.1 Analysis of LB Enfield’s economic structure in comparison to Greater London and the FEMA is shown in Table 4-7. This is based upon the ONS’ Business Register and Employment Survey (BRES) (2015) using Broad Industrial Groups. The data covers how the workforce of the Borough is divided between the different industrial groups.

4.9.2 At this high level the industrial groups which align most closely with B1a/b, B1c/B2 and B8 employment uses are: financial and insurance, business administration and support services and professional, scientific and technical (which align most closely with B1a and B1b uses); manufacturing, construction and motor trades (which align to industry uses i.e. B1c/B2); and transport and storage (which aligns with B8). The professional, scientific and technical industry group could be considered as broadly aligning to research and development or office use.

4.9.3 From the above it can be seen that:

- Manufacturing employment in LB Enfield accounts totals 5,400 jobs, equivalent to 5.3% of Borough’s workforce. This is higher proportionally than the London and FEMA averages (2.3% and 4.1% respectively). The construction (5.0%) and motor trades (1.9%) industry groups account for a substantially higher proportion of workers in LB Enfield than across Greater London, but are in line with the FEMA averages.

- In LB Enfield transport and storage firms) employ 5,900 people, 5.8% of the Borough’s workforce. In comparison the London and FEMA averages are lower (4.5% and 4.2% respectively). Wholesale industry group employment accounts for 6.0% of jobs in Enfield, which is significantly above the London average (2.9%); and slightly above the FEMA average (5.0%).

- Employment in key office-related service sectors is below the London average. The information and communication, financial and insurance, property, professional, scientific and technical, and business administration and support services industry groups employ 21,700 people in LB Enfield, or 21.5% of the Borough’s total workforce. Higher proportions of the Greater London and FEMA workforces are employed in office-related industry groups (42.7% and 26.6% respectively) than in the Borough.

- There is a significantly higher level of employment in the health industry group (16.3% compared with 10.1% across Greater London and 12.8% across the FEMA); and a moderately higher level of employment in the education industry group in LB Enfield (11.9%) and the FEMA (11.5%) compared to Greater London (7.7%).

- These findings are in relative contrast with the resident-based SOC analysis in Table 4-3, suggesting that there may be a disparity between the occupations of LB Enfield’s residents and the employment available within the Borough. For example, the SOC analysis indicates that 42.8% of all residents work in managerial or professional occupations (defined as SOC major groups 1-3), whereas the BRES data shows that office-related industrial groups such as finance and insurance and information and communication are under-represented within the Borough, and only account for 21.5% of employment. This helps explain the mismatch between resident- and workplace-based earnings and the strong flow of out-commuting from the Borough, as shown Table 4-1 and Table 4-4.
### Table 4-7 Employment by Broad Industrial Group in 2015

<table>
<thead>
<tr>
<th>Broad Industry Group</th>
<th>LB Enfield</th>
<th>% of Total</th>
<th>Greater London</th>
<th>% of Total</th>
<th>FEMA</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, forestry and fishing (excluding farm agriculture)</td>
<td>100</td>
<td>0.1</td>
<td>0.0</td>
<td>0.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mining, quarrying &amp; utilities</td>
<td>900</td>
<td>0.8</td>
<td>0.1</td>
<td>0.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>5,400</td>
<td>5.3</td>
<td>2.3</td>
<td>4.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>5,000</td>
<td>5.0</td>
<td>0.2</td>
<td>6.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motor trades</td>
<td>1,900</td>
<td>1.9</td>
<td>0.3</td>
<td>1.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale</td>
<td>6,100</td>
<td>6.0</td>
<td>2.9</td>
<td>5.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>12,800</td>
<td>12.7</td>
<td>12.5</td>
<td>12.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport &amp; storage (including postal)</td>
<td>5,900</td>
<td>5.8</td>
<td>4.5</td>
<td>4.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation and food services</td>
<td>5,700</td>
<td>5.6</td>
<td>7.5</td>
<td>6.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information &amp; communication</td>
<td>3,300</td>
<td>3.3</td>
<td>7.7</td>
<td>4.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial &amp; insurance</td>
<td>1,600</td>
<td>1.6</td>
<td>7.2</td>
<td>1.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property</td>
<td>2,300</td>
<td>2.2</td>
<td>2.8</td>
<td>2.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional, scientific &amp; technical</td>
<td>4,600</td>
<td>4.5</td>
<td>14.1</td>
<td>7.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business administration &amp; support services</td>
<td>10,000</td>
<td>9.9</td>
<td>10.9</td>
<td>10.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public administration &amp; defence</td>
<td>3,600</td>
<td>3.5</td>
<td>4.3</td>
<td>3.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>12,000</td>
<td>11.9</td>
<td>7.7</td>
<td>11.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health</td>
<td>16,500</td>
<td>16.3</td>
<td>10.1</td>
<td>12.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts, entertainment, recreation &amp; other services</td>
<td>3,600</td>
<td>3.6</td>
<td>5.0</td>
<td>5.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>101,300</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td></td>
<td><strong>-</strong></td>
</tr>
</tbody>
</table>

*Source: ONS, (2015); Business Register and Employment Survey.*

4.9.4 Further analysis of the composition and recent change in key office-related industry

---

34 Employment is expressed as number of people employed, being aged 16 or over and paid directly from an organisation’s payroll. It does not include voluntary workers, self-employed and working owners not paid via PAYE.
groups based on the ONS Business Register and Employment Survey (2015)\textsuperscript{35} shows that:

- In absolute terms the largest growth has been observed in the: retail trade (except for motor vehicles); warehousing and support activities for transportation; food and beverage services; buildings and landscape services; and social work activities without accommodation. Together these sectors added around 7,500 jobs from 2009-2015.
- The fastest average growth rates between 2009 and 2015 (though for most of them smaller in absolute terms) have been observed in the warehousing and support activities for transportation (167.6%); manufacture of wearing apparel (101.7%); computer programming and related activities (54.3%); architectural and engineering activities (52.5%); and real estate activities (50.5%).
- The greatest contractions in both absolute and proportional terms have been seen in employment activities and postal and courier activities (a combined loss of approximately 1,800 jobs; and an average growth rate of -49.2% and -29.3% respectively).

Key non B-use class Employers

4.9.5 As identified in Table 4-7 above, the health and education industry groups comprise a significant proportion of the employment market within the LB Enfield (16.3% and 11.9% respectively). As premises accommodating these sectors do not constitute B-use class floorspace, it is not a requirement of this ELR to consider the floorspace and land needs of either. It should be recognised however that there are several key employers from these industries in the Borough, including Chase Farm Hospital and North Middlesex University Hospital. It should be noted that though still prominent, the education sector in Enfield has been declining since 2009, mostly due to the closure of the Middlesex University campus at Trent Park in 2012.

Location Quotient

4.9.6 Location quotients provide a comparison measure of the relative size of an industry group. A location quotient greater than 1.0 means that the concentration of employment in the industry group is above the Greater London average, whereas a location quotient below 1.0 means it is below the Greater London average. The higher the location quotient the greater the industry specialisation. Industry groups with high location quotients often pinpoint those sectors in which the local economy has a comparative advantage.

4.9.7 Table 4-8 presents the location quotient by broad industry group in the LB Enfield relative to Greater London. The table also includes data on the percentage change in employment over the period from 2010 to 2015 and the relative share of total employment each industrial group has. This helps to identify those sectors in which the Borough is relatively well represented, growing and of importance to the local economy.

4.9.8 The table shows three industry groups are well-represented (location quotient above 1.2, i.e. the sector has 20%+ more employment than expected when compared against the Greater London average) and have experienced growth rates of over 15% between 2010 and 2015: retail; property; and health.

4.9.9 It is notable that several industry groups have a location quotient which is below 1.0 (and are therefore less represented within the Borough compared with the average for Greater

\textsuperscript{35} Analysis carried out at a SIC 2-digit level, for sectors employing at least 500 people in Enfield in 2015.
London Borough of Enfield Employment Land
Review 2016

Several industries are similar to the Greater London average, but have experienced notable drops in employment between 2010 and 2015. In particular lower value industries such as construction (-11.7%) and office-related sectors including business administration and support services (-15.7%) have been affected. Both of these industries make up a relatively high proportion of employment in the Borough (14.5% combined), indicating a steady decline and that the market may be oversaturated within the Borough.

From further analysis at the SIC 2-digit level, there is a number of subsectors that are of particular interest and are expected to contribute towards strong future economic growth within the Borough, providing LB Enfield with opportunities to grow its higher value-added employment base including:

- Security and investigation;
- Civil engineering; and
- Services to buildings and landscape.

Following a 2011 paper from the Department for Business Innovation and Skills, the 2017 LB Enfield Socio Economic Assessment (SEA) defined a list of “innovative” subsectors based on a SIC 4-digit analysis\(^\text{36}\). The results show that LB Enfield has a comparative advantage in seven of the UK highest innovative propensity sectors, in the sense that the Borough is specialised in these sectors as well as they are growing in terms of employment. Among those seven sectors, three are also particularly large employers in LB Enfield (more than 3,000 employees in 2015): industrial cleaning; building, construction and real estate; and specialist retail. However, three innovative sectors had been declining since 2009 in terms of sectoral employment: financial activities; employment activities; and logistics and transportation.

\(^{36}\) It is important to note that the following “innovative” sectors only comprises the specific SIC 4-digit subsectors that have been identified as “innovative” by the 2011 DBIS paper. As such, a local authority can have growing employment and specialisation in one SIC 2-digit broader sector, but decline in the specific SIC 4-digit subsectors that have been identified as having a high innovative propensity.
Table 4-8 Location Quotients within the LB Enfield (Greater London = 1.0) (2015) 37 38

<table>
<thead>
<tr>
<th>Broad Industry Group</th>
<th>Location Quotient</th>
<th>% Change in Employment 2010-2015</th>
<th>Employment (Actual)</th>
<th>% Employment Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>0.1</td>
<td>N/A</td>
<td>100</td>
<td>0.1</td>
</tr>
<tr>
<td>Mining, quarrying &amp; utilities</td>
<td>1.3</td>
<td>-7.2</td>
<td>900</td>
<td>0.8</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2.3</td>
<td>32.0</td>
<td>5,400</td>
<td>5.3</td>
</tr>
<tr>
<td>Construction</td>
<td>1.8</td>
<td>-11.7</td>
<td>5,000</td>
<td>5.0</td>
</tr>
<tr>
<td>Motor trades</td>
<td>2.4</td>
<td>30.4</td>
<td>1,900</td>
<td>1.9</td>
</tr>
<tr>
<td>Wholesale</td>
<td>1.9</td>
<td>9.1</td>
<td>6,100</td>
<td>6.0</td>
</tr>
<tr>
<td>Retail</td>
<td>1.5</td>
<td>20.9</td>
<td>12,800</td>
<td>12.7</td>
</tr>
<tr>
<td>Transport &amp; storage (including postal)</td>
<td>1.3</td>
<td>2.1</td>
<td>5,900</td>
<td>5.8</td>
</tr>
<tr>
<td>Accommodation and food services</td>
<td>0.7</td>
<td>18.4</td>
<td>5,700</td>
<td>5.6</td>
</tr>
<tr>
<td>Information &amp; communication</td>
<td>0.4</td>
<td>25.2</td>
<td>3,300</td>
<td>3.3</td>
</tr>
<tr>
<td>Financial &amp; insurance</td>
<td>0.2</td>
<td>-26.2</td>
<td>1,600</td>
<td>1.6</td>
</tr>
<tr>
<td>Property</td>
<td>0.8</td>
<td>52.2</td>
<td>2,300</td>
<td>2.2</td>
</tr>
<tr>
<td>Professional, scientific &amp; technical</td>
<td>0.3</td>
<td>14.5</td>
<td>4,600</td>
<td>4.5</td>
</tr>
<tr>
<td>Business admin &amp; support services</td>
<td>0.9</td>
<td>-15.7</td>
<td>10,000</td>
<td>9.9</td>
</tr>
<tr>
<td>Public admin &amp; defence</td>
<td>0.8</td>
<td>-22.4</td>
<td>3,600</td>
<td>3.5</td>
</tr>
<tr>
<td>Education</td>
<td>1.5</td>
<td>12.0</td>
<td>12,000</td>
<td>11.9</td>
</tr>
<tr>
<td>Health</td>
<td>1.6</td>
<td>20.8</td>
<td>16,500</td>
<td>16.3</td>
</tr>
<tr>
<td>Arts, entertainment, recreation &amp; services</td>
<td>0.7</td>
<td>4.4</td>
<td>3,600</td>
<td>3.6</td>
</tr>
</tbody>
</table>

Source: ONS, (2015); Business Register and Employment Survey. Shaded cells represent those sectors which:
- Have an LQ greater than 1.2
- Have seen employment growth greater than 15% between 2010 and 2015
- Currently support more than 10% of LB Enfield’s total employees count.

37 Because of the small size of the sample, employment change the ‘agriculture, forestry and fishing’ industry has not been computed.
38 Employment is expressed as number of people employed, being aged 16 or over and paid directly from an organisation’s payroll. It does not include voluntary workers, self-employed and working owners not paid via PAYE.
4.10 Summary

4.10.1 This section has introduced the socio-economic profile of LB Enfield with the most up to date data, benchmarked against London.

4.10.2 In summary, LB Enfield has a growing population which is expected to keep expanding in the future. The population is relatively well skilled in comparison to the Borough's FEMA, but is not as well paid and holds lower proportions of jobs in higher skilled occupations. Residents who do not work in the Borough are most likely to commute to central London. The local workforce commutes in from the surrounding FEMA and is less well paid than the residents. This suggests that jobs in LB Enfield are lower value in comparison to the ones residents out commute to elsewhere in London.

4.10.3 The Borough's economy in its current state is based upon public services, industrial and warehouse associated activities and lower value services such as retail. Recent economic growth has mainly been in these sectors. However, there has also been employment expansion in sectors more typically associated with higher value jobs such as information and communications and professional, scientific and technical. Innovative sub-sectors such as civil engineering and industrial cleaning are also flourishing. These sectors could provide a base from which the Borough’s economy can use as a foundation to develop more high value jobs.

4.10.4 Key indicators for this ELR are changes to the supply and demand of employment land and we analyse how this has changed in the following sections of the report.
5. Supply

5.1 Introduction

5.1.1 This section provides a summary of the key findings of the site and desk based survey and identifies the prominent characteristics of LB Enfield’s employment land. Our analysis considers which employment clusters are currently successfully supporting various types of occupiers. It also identifies the clusters that are both unsuitable for different use types and those which could potentially be redeveloped or intensified to improve the Borough’s employment land offer.

5.2 Employment Land Surveyed

5.2.1 Employment clusters were identified by utilising the Borough’s Core Strategy (2010) and previous ELR (2012), the Industrial Land Supply and Economy Study (2015) produced by AECOM for the GLA, the Council planning team’s knowledge of the Borough and a desktop survey. In total, 35 employment clusters were identified for survey.

5.2.2 Table 5-1 and Figure 5-1 present all of the employment clusters that were surveyed during November 2016. The sites were appraised against a set of criteria authored by AECOM, which was drawn primarily from the Land for Industry and Transport SPG (2012) and subsequently agreed with the Council. The appraisal criterion was partly tailored based upon the surveying team’s employment land experience and the unique context of the Borough.

5.2.3 The 35 clusters total 415.3ha in area. The clusters by typology accounted for the following amounts of land out of the total 415.3ha surveyed: SIL 332.1ha, LSIS 34.6ha; Town Centres 33.6ha; and non-designated 15.0ha. Though land within clusters may be used by non-B-class employment uses such as retail these other uses are integral to each cluster and add to its identity and role, so clusters are assessed as a whole rather than at a site specific level.

5.2.4 Analysis of the clusters in section 5.4 has been done by sub-area. The sub-areas are based upon either defined areas in the Council’s LDF (e.g. Central Leeside), the strategic routes which clusters sit on or are close to and whether there are any geographical factors which separate clusters (e.g. distance, railway lines). The sub-areas are: Freezy Water and Innova Park; Brimsdown; Central Leeside; A10 and Southbury Road Junction; North Circular Corridor; Town Centres; and Other clusters.
Figure 5-1 LB Enfield Employment Land Clusters: Context Map

Source: AECOM 2016.
Industrial Employment Land Supply

5.2.5 A portion of the land located within the Borough’s employment clusters is referred to as ‘industrial employment land’. This is defined as land falling within the industrial uses identified in the 2015 Industrial Land Supply and Economy Study. The Study identifies industrial uses as being either ‘core’ (e.g. general industry and warehousing), ‘wider’ (e.g. land for transport functions, utilities, waste management and recycling) and ‘vacant’.

5.2.6 Building on the GLA 2015 Industrial Land Supply and Economy Study with use of data collected in this study the survey work established that LB Enfield contains 451.5ha of industrial land broken down as follows:

- core\textsuperscript{39}: 326.2ha
- wider\textsuperscript{40}: 122.4ha; and
- vacant developable land including land with derelict buildings, 2.9ha.

5.2.7 During the survey it was observed that since the GLA 2015 supply assessment approximately 10.2ha of vacant industrial land had been re-developed for industrial uses; 0.4ha had been redeveloped for non industrial uses (retail), and 10.8ha remained vacant but was judged to be undevelopable as land lay outside designated boundaries or was not marketed.

5.2.8 The majority of industrial employment land in the Borough lies within clusters designated as SIL and LSIS. Some is located outside in non-designated clusters such as C26 and C32 that are over 0.25ha. These clusters were not surveyed as they did not match the PPG minimum threshold of >0.25ha.

5.2.9 In summary, the supply of industrial employment land in LB Enfield is that presented in the 2015 GLA study, amended to take into account significant changes of use to non-industrial uses and vacant land. The supply of land comprises land both within the clusters surveyed and on-sites smaller than 0.25 ha which is in industrial use, as defined by the 2015 GLA study. The total supply of industrial land comprising core, wider uses and vacant land including land with derelict buildings in the borough is 451.5ha. Core uses total 326.2ha.

Office Employment Land Supply

5.2.10 A portion of the land found within the employment clusters surveyed is in office use. The 2015 GLA study identifies land currently in office use within designated industrial land i.e. SIL, LSIS. However, a comprehensive database identifying sites outside these areas which contain floorspace for office uses is not available. Where greater than 0.25 ha every effort has been made to include these sites as clusters for survey. However it is recognised that there is a supply of floorspace in office use which lies dispersed outside of the employment clusters identified and is of an unknown scale.

5.2.11 This section of the report therefore provides commentary on the scale, distribution and

\textsuperscript{39} Light and general industry, warehouses and storage  
\textsuperscript{40} Wholesale markets, waste management and recycling, utilities, land for transport
quality of supply of office premises and floorspace both at a cluster level where office uses exist, and separately at a more general level for the floorspace that is smaller in scale and lies outside of the clusters.

5.2.12 For the purpose of the forecasting demand for office premises and floorspace set out in Section 6, the most recent Valuation Office Agency (VOA) data on the supply of floorspace in LB Enfield has been used\(^\text{41}\). This dataset in effect comprises office floorspace both within clusters surveyed and those which are dispersed outside of these clusters, identifying that the total stock of office premises in LB Enfield is 165,000sqm.

**Surveyed Employment Clusters**

**Table 5-1 Surveyed Employment Clusters – November 2016**

<table>
<thead>
<tr>
<th>Cluster No.</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>Area (hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Freezy Water</td>
<td>SIL</td>
<td>10.8</td>
</tr>
<tr>
<td>C2</td>
<td>Innova Park</td>
<td>SIL</td>
<td>26.8</td>
</tr>
<tr>
<td>C3</td>
<td>Brimsdown Part A</td>
<td>SIL</td>
<td>20.5</td>
</tr>
<tr>
<td>C4</td>
<td>Brimsdown Part B</td>
<td>SIL</td>
<td>64.1</td>
</tr>
<tr>
<td>C5</td>
<td>Brimsdown Part C</td>
<td>SIL</td>
<td>50.5</td>
</tr>
<tr>
<td>C6</td>
<td>Meridian Business Park</td>
<td>SIL</td>
<td>14.2</td>
</tr>
<tr>
<td>C7</td>
<td>Redburn Trading Estate</td>
<td>SIL</td>
<td>4.1</td>
</tr>
<tr>
<td>C8</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part A</td>
<td>SIL</td>
<td>33.4</td>
</tr>
<tr>
<td>C9</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part B</td>
<td>SIL</td>
<td>17.2</td>
</tr>
<tr>
<td>C10</td>
<td>Montagu Industrial Area North</td>
<td>SIL</td>
<td>9.6</td>
</tr>
<tr>
<td>C11</td>
<td>Montagu Industrial Area South</td>
<td>LSIS</td>
<td>6.2</td>
</tr>
<tr>
<td>C12</td>
<td>Aztec 406</td>
<td>SIL</td>
<td>16.6</td>
</tr>
<tr>
<td>C13</td>
<td>Eley's Estate</td>
<td>SIL</td>
<td>29.0</td>
</tr>
<tr>
<td>C14</td>
<td>Edmonton Eco Park</td>
<td>SIL</td>
<td>16.1</td>
</tr>
<tr>
<td>C15</td>
<td>Harbet Road industrial Estate</td>
<td>SIL</td>
<td>19.2</td>
</tr>
<tr>
<td>C16</td>
<td>Alma Road</td>
<td>LSIS</td>
<td>4.8</td>
</tr>
<tr>
<td>C17</td>
<td>New Southgate Industrial Estate</td>
<td>LSIS</td>
<td>0.7</td>
</tr>
<tr>
<td>C18</td>
<td>Regent's Avenue</td>
<td>LSIS</td>
<td>2.0</td>
</tr>
<tr>
<td>C19</td>
<td>Oakthorpe Dairy</td>
<td>LSIS</td>
<td>3.2</td>
</tr>
<tr>
<td>C20</td>
<td>Commercial Road and North Middlesex Estate</td>
<td>LSIS</td>
<td>10.1</td>
</tr>
<tr>
<td>C21</td>
<td>Langhedge Lane Industrial Estate</td>
<td>LSIS</td>
<td>0.7</td>
</tr>
</tbody>
</table>

### Cluster No.  Cluster Name  Designation  Area (hectares)

<table>
<thead>
<tr>
<th>Cluster No.</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>Area (hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C22</td>
<td>Claverings Industrial Estate</td>
<td>LSIS</td>
<td>3.3</td>
</tr>
<tr>
<td>C23</td>
<td>Queensway Industrial Estate</td>
<td>LSIS</td>
<td>3.5</td>
</tr>
<tr>
<td>C24</td>
<td>Kingswood Industrial Estate</td>
<td>Not Designated</td>
<td>2.0</td>
</tr>
<tr>
<td>C25</td>
<td>Dairy Crest Depot</td>
<td>Not Designated</td>
<td>0.4</td>
</tr>
<tr>
<td>C26</td>
<td>Brettenham Road Warehouse</td>
<td>Not Designated</td>
<td>0.3</td>
</tr>
<tr>
<td>C27</td>
<td>Park Avenue Garage</td>
<td>Not Designated</td>
<td>0.4</td>
</tr>
<tr>
<td>C28</td>
<td>Picketts Lock Wholesale</td>
<td>Not Designated</td>
<td>2.5</td>
</tr>
<tr>
<td>C29</td>
<td>GR Wright and Sons</td>
<td>Not Designated</td>
<td>2.1</td>
</tr>
<tr>
<td>C30</td>
<td>Wharf Road Industrial Estate</td>
<td>Not Designated</td>
<td>0.6</td>
</tr>
<tr>
<td>C31</td>
<td>Ripmax</td>
<td>Not Designated</td>
<td>0.5</td>
</tr>
<tr>
<td>C32</td>
<td>Argon Road Industrial Estate</td>
<td>Not Designated</td>
<td>5.9</td>
</tr>
<tr>
<td>C33</td>
<td>Barrow Well Green Recycling Centre</td>
<td>Not Designated</td>
<td>0.4</td>
</tr>
<tr>
<td>C34</td>
<td>Enfield Town Centre</td>
<td>Town Centre</td>
<td>23.3</td>
</tr>
<tr>
<td>C35</td>
<td>Southgate Town Centre</td>
<td>Town Centre</td>
<td>10.4</td>
</tr>
</tbody>
</table>

**Total** 415.3

Source: AECOM 2016.

#### 5.3 Sub-Area Analysis

#### 5.3.1 Freezy Water and Innova Park

The 35 clusters are grouped and analysed at sub-areas levels: Freezy Water and Innova Park; Brimsdown; Central Leeside; A10 and Southbury Road Junction; North Circular Corridor; town centres; and additional clusters. The sub-areas have been identified by a combination of geography, whether there are unique characteristics that an area has and/or there is specific policy context (e.g. Central Leeside AAP area).

**Freezy Water and Innova Park**

#### 5.3.2 The Freezy Water sub-area located north of Brimsdown is composed of Freezy Water (C1) and Innova Park (C2). The sub-area is situated in close proximity to M25 Junction 25 and two WAML stations (Enfield Lock and Waltham Cross). The clusters are presented in Table 5-2 and Figure 5-2.

#### Table 5-2 Freezy Water and Innova Park Sub-area Clusters

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Freezy Water</td>
<td>SIL</td>
<td>B2, B8</td>
<td>10.8</td>
</tr>
<tr>
<td>C2</td>
<td>Innova Park</td>
<td>SIL</td>
<td>B1a, B8, C1</td>
<td>26.8</td>
</tr>
</tbody>
</table>

**Total** 37.6
5.3.3 Freezy Water (C1) is the northern most employment cluster in LB Enfield. The cluster was constructed recently and contains B2 and B8 class uses. Occupiers include Tesco, Yodel and Kevin Hughes. The former two have large distribution centres, while the latter manufactures high technology radar systems. The cluster has a high quality internal environment, and benefits from good strategic road access due to being located close to the M25 and A10. Parking is ample and the cluster does not induce any bad neighbour effects on nearby land uses.

5.3.4 The second cluster in the sub-area is Innova Park (C2). The cluster was developed recently and contains a mix of large warehousing, small to medium size offices and a hotel. Major tenants in the warehousing include John Lewis, Iceland and XPO Logistics. The offices are occupied by a variety of organisations such as Eurotech Monitoring Services and Airswift. The buildings and environment in the cluster are very good quality, with an ample supply of dedicated parking for employees. There is no impact on surrounding residential
Figure 5-2 Freezy Water and Innova Park Sub-area

Source: AECOM 2016
Brimsdown

5.3.5 The Brimsdown sub-area is located south of Freezy Water and Innova Park and covers a large area of the Lee Valley in LB Enfield. The A1055 and WAML run through the centre of the sub-area, providing access to a strategic road and three train stations at its heart (Brimsdown, Enfield Lock and Ponders End). Table 5-3 lists the employment clusters in the sub-area.

Table 5-3 Brimsdown Sub-area Clusters

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3</td>
<td>Brimsdown Part A</td>
<td>SIL</td>
<td>B2, B8, Sui generis</td>
<td>20.5</td>
</tr>
<tr>
<td>C4</td>
<td>Brimsdown Part B</td>
<td>SIL</td>
<td>B8, Sui generis</td>
<td>64.1</td>
</tr>
<tr>
<td>C5</td>
<td>Brimsdown Part C</td>
<td>SIL</td>
<td>B2, B8, A1 and Sui generis</td>
<td>50.5</td>
</tr>
<tr>
<td>C6</td>
<td>Meridian Business Park</td>
<td>SIL</td>
<td>B2, B8</td>
<td>14.2</td>
</tr>
<tr>
<td>C7</td>
<td>Redburn Trading Estate</td>
<td>SIL</td>
<td>B2, B8, A1</td>
<td>4.1</td>
</tr>
<tr>
<td>C16</td>
<td>Alma Road</td>
<td>LSIS</td>
<td>B2, Sui generis</td>
<td>4.8</td>
</tr>
<tr>
<td>C29</td>
<td>GR Wright and Sons</td>
<td>Not Designated</td>
<td>B2</td>
<td>2.1</td>
</tr>
<tr>
<td>C30</td>
<td>Wharf Road Industrial Estate</td>
<td>Not Designated</td>
<td>B2</td>
<td>0.6</td>
</tr>
<tr>
<td>C31</td>
<td>Ripmax</td>
<td>Not Designated</td>
<td>B8</td>
<td>0.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>161.2</strong></td>
</tr>
</tbody>
</table>

Source: AECOM 2016.

5.3.6 The main Brimsdown SIL is composed of three clusters (C3, C4 and C5). C3 forms the northern most part of the overall SIL. The cluster contains a variety of B2, B8 and sui-generis uses, with premises including medium to large warehousing and some small manufacturing space. Notable occupiers include Anovo, Hermes and Magazine Printing Co. Mostly in good condition, poorer quality areas are found on the eastern side of Bilton Way. There is no impact on sensitive uses to the north.

5.3.7 C4 is the largest of the three Brimsdown SIL clusters (64.1ha), equating for 47.4% of total land when the three are combined. The cluster is occupied by a variety of businesses, with larger occupiers including Greggs, Makro, NLL and Warburtons. A substantial area in the north of the cluster is taken up by Brimsdown Power Station. Overall, the condition of premises and environment is good. Some poorer quality areas exist, but these are in the minority. There is little vacancy within current premises, but some areas do have potential for redevelopment and intensification.

5.3.8 C5 is the most southern of the three Brimsdown SIL clusters. Premises in the cluster include the UOP petrochemical plant, small to medium warehouse space, small manufacturing space and a presence of non-B uses such as retail. The premises and
environment of the cluster are generally good quality with some poorer quality stock around Jeffrey Road. High quality floorspace is being built-out at Enfield Distribution Park.

5.3.9 Overall the Brimsdown SIL functions well, with direct strategic road access, though some opportunities for change and intensification may exist under the right market conditions. The SIL is notable as it has a high industrial employment density and a low proportion of non-B use employment floorspace, as outlined in Error! Reference source not found. and Error! Reference source not found. of Appendix B.

5.3.10 Meridian Business Park is the most southern cluster in the Brimsdown sub-area. It is bordered by Wharf Road to the north, River Lee Navigation to the east, A1055 to the west, and Picketts Lock golf course to the south. The large warehousing found in the Navigation Park sub-division of the cluster is recently developed and some of the units are available to let (4,500 – 10,900sqm). Both building quality and environment are in very good condition. Key occupiers include DPD, Interlink, Euromix and LB Enfield Council. One 1.8 hectare site is currently being marketed.

5.3.11 The Redburn Trading Estate (C7) is located east of Meridian Business Park (C6) over the A1055. The cluster is accessed via residential roads, limiting the potential for 24hr working. Premises in the cluster are composed of workshop and medium warehouse space, in mostly good condition. There is currently some vacancy in the cluster, with units available ranging in size from 1,700sqm to 23,000sqm.

5.3.12 C16 is located west of C5 over the WAML and is situated on Alma Road. Premises include small manufacturing and workshop space which is occupied by various businesses including motor trades and small manufacturing firms. The buildings and internal environment are in poor condition. Parking is on-street and considered inadequate given little available space and poor layout. There is limited or no potential for intensification of the site is floorspace as surrounded by sensitive uses.

5.3.13 GR Wright and Sons (C29) are located just north of Meridian Business Park (C6). It is bounded by the A1055, River Lee Navigation and Wharf Road. The sole occupier of the cluster is GR Wright and Sons who run a flour mill which seemed well functioning.

5.3.14 Wharf Road Industrial Estate (C30) is located just east of C29 on Wharf Road. The cluster is solely occupied by a business that specialises in construction related light processing. The buildings on site are in poor condition, while the internal environment is in an average state. There is no vacancy in the cluster currently and no obvious potential for redevelopment.

5.3.15 C31 is solely occupied by Ripmax, a distributor of radio control models. The cluster fronts onto Enstone Road and is bordered by the WAML to the east, and is solely occupied by two poor quality medium size warehouses. The cluster functions well enough for its current purpose.
Figure 5-3 Brimsdown Sub-area

Source: AECOM 2016
The Central Leeside sub-area is located south of the Brimsdown and contains clusters within the Central Leeside AAP boundary. The main body of clusters are focused around the A1055 and North Circular Junction. Angel Road station is located near to the junction. Details of the clusters contained in the sub-area are shown in Table 5-4 and Figure 5-4.

### Table 5-4 Central Leeside Sub-area Clusters

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C10</td>
<td>Montagu Industrial Area North</td>
<td>SIL, LSIS</td>
<td>B2, B8, Sui-generis</td>
<td>9.6</td>
</tr>
<tr>
<td>C11</td>
<td>Montagu Industrial Area South</td>
<td>LSIS</td>
<td>Sui-generis</td>
<td>6.2</td>
</tr>
<tr>
<td>C12</td>
<td>Aztec 406</td>
<td>SIL</td>
<td>B2, B8</td>
<td>16.6</td>
</tr>
<tr>
<td>C13</td>
<td>Eley's Estate</td>
<td>SIL</td>
<td>B2, B8</td>
<td>29.0</td>
</tr>
<tr>
<td>C14</td>
<td>Edmonton Eco Park</td>
<td>SIL</td>
<td>B2, Sui-generis</td>
<td>16.1</td>
</tr>
<tr>
<td>C15</td>
<td>Harbet Road industrial Estate</td>
<td>SIL</td>
<td>B2, B8, Sui-generis</td>
<td>19.2</td>
</tr>
<tr>
<td>C22</td>
<td>Claverings Industrial Estate</td>
<td>LSIS</td>
<td>B1a, B8, D uses</td>
<td>3.3</td>
</tr>
<tr>
<td>C28</td>
<td>Picketts Lock Wholesale</td>
<td>Not Designated</td>
<td>B8</td>
<td>2.5</td>
</tr>
<tr>
<td>C32</td>
<td>Argon Road Industrial Estate</td>
<td>Not Designated</td>
<td>B8</td>
<td>5.9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td>108.6</td>
</tr>
</tbody>
</table>

Source: AECOM 2016.

5.3.17 C10 is located north of C11 and east of C12 over the WAML and A1055. It contains medium warehousing, workshop space, open storage areas and a banqueting and wedding centre. Land uses in the cluster are B2, B8 and sui-generis. Some occupancy by faith groups was noted. The internal environment and premises overall are in poor condition. Servicing is inadequate due to the tight and congested internal road network. Some sites along Stacy Avenue are either in poor condition and/or under-utilised and could be redeveloped.

5.3.18 Montagu Industrial Area South (C11) is formed of two segments. The first connects with C10 and the other is located south over Conduit Lane. The premises in the cluster include small warehousing, workshops, yard / open storage areas and a metal recycling plant. The premises are used for small scale distribution, motor trades, scrap works and metal recycling. The environment and buildings are poor quality, except for the metal recycling plant in the southern part. The cluster has no negative impacts on the neighbouring Kenninghall Open Space. The southern half functions well, while the northern part could be redeveloped.

5.3.19 C12 is located north of Eley’s Estate (C13) and is bordered by the WAML to the west. The cluster is occupied by a number of large warehouses and a recycling depot run by Biffa.
The key warehouse occupiers include Lidl, Heal’s and Premier Workplace Solutions. The buildings and internal environment are of good quality. There is some potential to develop an un-touched area of land west of Pymmes Brook. Overall, the cluster functions well currently.

5.3.20 Eley’s Estate (C13) is bounded by Aztec 406 (C12) to the north, Edmonton Ecopark (C14) to the east and North Circular ring-road to the south. Premises on the Estate include large scale manufacturing space, medium warehousing and storage yards. The largest occupier is Coca Cola Enterprises, other occupiers businesses are generally of a smaller scale. The quality of premises and environment is variable, some parts being considered very good (e.g. Advent Business Park) and others being poorer such as along Nobel Road. Servicing is not adequate due to the congested internal road network, caused partly by significant amounts of on-street parking. There is currently some vacancy (e.g. 1,200sqm unit in Advent Business Park).

5.3.21 Edmonton Ecopark (C14) is bounded by Eley’s Estate (C13) to the west, the North Circular ring-road to the south, River Lee Navigation to the east and Aztec 406 (C12) to the north. It is occupied by a waste to energy plant with capacity to power 72,000 dwellings\textsuperscript{42}. The buildings and internal environment are in good condition. Activities at the plant do not appear to negatively impact upon surrounding land uses. The cluster functions well.

5.3.22 Harbet Road Industrial Estate (C15) is situated within the Meridian Water regeneration area and bordered by the River Lee Navigation and River Lea. Large scale redevelopment of Stonehill Business Park sub-area has recently begun. The remaining premises include small warehouse and manufacturing space, workshops, yard storage and a bus depot. The environment and premises are poor quality, except from the Hastingwood Trading Estate sub-area which is in good condition. A significant amount of new employment floorspace will come forward in the future within the cluster. It is noted that the previous Lea Valley Business Centre site has been vacant for a number of years.

5.3.23 C22 is located to the west of Deephams Sewage Treatment Works across the WAML and A1055. The cluster contains small to medium warehousing and small to medium offices. Occupiers include SAS International, LB Enfield Council Services, Art Start Studio and some faith groups. The cluster is derelict, under-used, in poor condition and could be redeveloped in the future.

5.3.24 C28 is situated parallel to the A1055 and west of the Lee Valley Athletics Centre. The cluster contains one large warehouse accommodating three occupiers. The warehouse and environment around it are in good condition. There is no potential for 24hr working due to the dwellings adjacent to the main entrance on Pickett’s Lock Lane.

5.3.25 Argon Road Industrial Estate (C32) is located south of the North Circular and is bounded by the River Lee Navigation to the east. The cluster is dominated by a large warehouse previously occupied by BOC, with much of the estate is occupied by storage and removals businesses in good quality premises. A significant amount of land is used for storing motor vehicles and containers and could be used more intensive.

\textsuperscript{42} \url{http://www.londonwaste.co.uk/community/ecopark-energy/}, accessed November 2016.
Figure 5-4 Central Leeside Sub-area

Source: AECOM 2016.
### A10 and Southbury Road Junction

**5.3.26** Great Cambridge Road and Martinbridge Trading Estate Parts A and B (C8 and C9) and Queensway Industrial Estate (C23) form an employment sub-area in the vicinity of where the A10 meets Southbury Road. Southbury station sits in the middle of the sub-area. Details about the sub-area clusters are presented in Table 5-5 and Figure 5-5.

**Table 5-5 A10 and Southbury Junction Sub-area Clusters**

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C8</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part A</td>
<td>SIL</td>
<td>B1a, B2, B8, A1</td>
<td>33.4</td>
</tr>
<tr>
<td>C9</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part B</td>
<td>SIL</td>
<td>B2, B8, Sui-generis</td>
<td>17.2</td>
</tr>
<tr>
<td>C23</td>
<td>Queensway Industrial Estate</td>
<td>LSIS</td>
<td>B2, B8, A1, Sui-generis</td>
<td>3.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>54.1</strong></td>
</tr>
</tbody>
</table>

*Source: AECOM 2016.*

**5.3.27** Great Cambridge Road and Martinbridge Trading Estate Part A is made up of SIL located north and south of Southbury Road. Premises in the cluster include medium offices, medium to large warehouses, large manufacturing space and car dealerships. Notable occupiers include BM Polyco and Asda. There are also a high proportion of non-B use occupiers. The premises are in good or very good condition except for a few examples. There is potential for some redevelopment in the northern part of the cluster (e.g. vacant/derelict Carcraft site, car auctions area). Overall, the cluster functions well.

**5.3.28** Part B of the Great Cambridge Road and Martinbridge Trading Estate (C9) is located south of Part A (C8). The cluster is composed of SIL north and south of Lincoln Road and includes the recently developed Lumina Park. The building typologies include medium warehousing, medium manufacturing space and car showrooms. Occupiers include Medlock Electrical Distributors and ADI Global Distribution. The buildings and environment are in good condition. Currently some new warehouses in Lumina Park are available for occupancy. There is a proliferation of non-B use tenants in the units already let in Lumina Park and across the cluster as a whole. The cluster has a high proportion of non-B uses in comparison to other employment clusters in the Borough as shown in Error! Reference source not found. of Appendix B.

**5.3.29** C23 is located east of C8 and C9 over a branch line of the WAML. It is bordered to the south by a now vacant Middlesex University campus and a Tesco Extra superstore to the north. The cluster contains a number of premises such as medium manufacturing space, workshops and a bus depot which are mostly in poor condition. Occupiers include Arriva, Furnatic and a significant number of faith groups. A new Royal Mail Delivery Office is currently being constructed in the cluster.
Figure 5-5 A10 and Southbury Junction Sub-area

Source: AECOM 2016
5.3.30 The North Circular Corridor sub-area runs along the southern border of LB Enfield with Haringey. The clusters are all either in the North Circular AAP area or within a short travel distance from the road. Clusters in the Central Leeside AAP area are excluded. The clusters that are located in the Corridor are shown in Table 5-6 and Figure 5-6.

### Table 5-6 North Circular Sub-area Clusters

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C17</td>
<td>New Southgate Industrial Estate</td>
<td>LSIS</td>
<td>B1a, B8</td>
<td>0.7</td>
</tr>
<tr>
<td>C18</td>
<td>Regent’s Avenue</td>
<td>LSIS</td>
<td>B2, B8, Sui-generis</td>
<td>2.0</td>
</tr>
<tr>
<td>C19</td>
<td>Oakthorpe Dairy</td>
<td>LSIS</td>
<td>B1a, B2</td>
<td>3.2</td>
</tr>
<tr>
<td>C20</td>
<td>Commercial Road and North Middlesex Estate</td>
<td>LSIS</td>
<td>B2, B8, Sui-generis</td>
<td>10.1</td>
</tr>
<tr>
<td>C21</td>
<td>Langhedge Lane Industrial Estate</td>
<td>LSIS</td>
<td>B2, B8</td>
<td>0.7</td>
</tr>
<tr>
<td>C26</td>
<td>Brettenham Road Warehouse</td>
<td>Not Designated</td>
<td>B1c</td>
<td>0.3</td>
</tr>
<tr>
<td>C27</td>
<td>Park Avenue Garage</td>
<td>Not Designated</td>
<td>B2, Sui-generis</td>
<td>0.4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>17.5</strong></td>
</tr>
</tbody>
</table>

Source: AECOM 2016.

5.3.31 New Southgate Industrial Estate (C17) is located in the south west corner of LB Enfield near to Barnet and Haringey. Much of the Estate has been demolished and is being developed for residential purposes. Good quality small offices and medium warehouse space remain. Occupiers include Mulalley, a funeral directors and tile depot.

5.3.32 Regent’s Avenue (C18) is located where Green Lane meets the North Circular ring-road. The main occupiers are an Arriva Bus Depot (including dial a ride services), MOT Centre and Enterprise Car rental lot. The occupiers are housed in poor quality medium manufacturing and warehouse space, the internal environment is also in a poor state. A small proportion of the cluster has been recently turned into dwellings.

5.3.33 C19 is occupied solely by a large dairy run by Arla. The dairy buildings and environment around them are in very good condition. The dairy is situated in a residential area and generates HGV traffic, but the impact appears to be minimal. The cluster functions well overall.

5.3.34 Commercial Road and North Middlesex Estate (C20) is located on LB Enfield’s boundary.
with Haringey and links into more industrial land in the other Borough. Occupiers such as Mosaic and Tile Co and Torrent Trackside are housed in poor quality small to medium warehouses, and medium manufacturing space. The environment is average quality. The cluster generates a significant amount of car traffic and some odours which could negatively impact upon surrounding land uses (residential properties and North Middlesex Hospital). There are some vacant buildings with redevelopment potential such as an 8,800sqm warehouse/factory.

5.3.35 Langhedge Industrial Estate (C21) is an LSIS situated adjacent to Commercial Road and North Middlesex Estate (C20) over a branch of the WAML. The cluster is based upon a single access road with small warehouse and workshop spaces on either side. The premises are mostly good quality, though the internal environment is poor.

5.3.36 C26 is situated 0.2km west of Montagu Industrial Area North (C10) and 0.1km south of Federation Cemetery. The cluster is solely occupied by Sinclairs Laundry in a small warehouse with some ancillary office attached. The premises and internal environment are poor quality. The cluster functions adequately for the current occupier.

5.3.37 Park Avenue Garage (C27) is located 0.3km north of Silver Street railway station. The cluster contains mixed quality small manufacturing space and workshops. Occupiers include an interior design and manufacturing firm and a number motor trades businesses. Public transport access is excellent (PTAL 5)
Figure 5-6 North Circular Corridor Sub-area

Source: AECOM 2016.
Town Centres

5.3.38 The two town centres surveyed in LB Enfield were Enfield Town (C34) and Southgate (C35). Both contain significant quantities of non-retail employment uses unlike other centres in the Borough such as Edmonton Green and Angel Edmonton. The boundaries of both town centres have been extended past the Core Strategy defined areas in places to include some B-use employment premises situated adjacent. Further details are presented in Table 5-7 and Figure 5-7.

Table 5-7 Town Centre Sub-area Clusters

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C34</td>
<td>Enfield Town Centre</td>
<td>Town Centre</td>
<td>B1a, B8</td>
<td>23.3</td>
</tr>
<tr>
<td>C35</td>
<td>Southgate Town Centre</td>
<td>Town Centre</td>
<td>B1a</td>
<td>10.4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>33.6</strong></td>
</tr>
</tbody>
</table>

Source: AECOM 2016.

5.3.39 Enfield Town Centre (C34) is the largest retail area in the Borough. It contains some B use non-retail employment space in the form of medium offices and yard/open storage space. Offices are either located above retail units or in dedicated blocks in the east and west parts of cluster. The buildings and environment are in good condition. The Centre has good public transport access through Enfield Chase station, Enfield Town station and numerous bus stops (PTAL 5). There is currently some office floorspace vacancy in Refuge House (100–500sqm) which is located in the eastern part of the centre.

5.3.40 Southgate Town Centre has a number of very good quality small to medium scale offices in dedicated blocks (e.g. the Grange and Southgate Office Village) and above retail units. The environment is in very good condition. Public transport access is good due to Southgate Underground station providing a direct link to central London and Heathrow Airport the Piccadilly Line and the bus routes passing through it (PTAL 4). Some vacancy was observed in Southgate Office Village.
Figure 5-7 Town Centres Sub-area

Source: AECOM 2016.
5.3.41 There are three additional clusters located outside of the sub-areas. The additional clusters are shown in Table 5-8 and Figure 5-8.

**Table 5-8 Other Non-Sub-area Clusters**

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>B-Class and Other Employment Uses</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C24</td>
<td>Kingswood Industrial Estate</td>
<td>Not Designated</td>
<td>B2, B8, Sui-generis</td>
<td>2.0</td>
</tr>
<tr>
<td>C25</td>
<td>Dairy Crest Depot</td>
<td>Not Designated</td>
<td>B8</td>
<td>0.4</td>
</tr>
<tr>
<td>C33</td>
<td>Barrow Well Green Recycling Centre</td>
<td>Not Designated</td>
<td>B2</td>
<td>0.4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>2.8</strong></td>
</tr>
</tbody>
</table>

Source: AECOM 2016.

5.3.42 Kingswood Industrial Estate (C24) is located in Crews Hill. The surrounding land and much of Crews Hill contains a high number of plant nurseries and garden centres. Most of the cluster land area is taken up by yard/open storage space that is in poor condition. However, the Estate functions adequately for its current purposes. No notable B class uses were observed outside of C24 in Crews Hill during the survey.

5.3.43 C25 is singularly occupied by Dairy Crest who utilise the cluster as a milk float depot. The medium scale warehouse that occupies the cluster is dated but in good condition, the environment being of average quality. The cluster functions well for its current purpose.

5.3.44 Barrow Well Green Recycling Centre (C33) is situated adjacent to Clowes Sports Ground and accessed via Barrowell Green. The cluster comprises a recycling plant and depot where households can dispose of non-commercial waste. The premises and internal environment are good quality. Neighbouring dwellings are well shielded by high quality landscaping. Overall, the cluster appeared to be functioning well.
Figure 5-8 Other Clusters

Source: AECOM 2016.
5.4 Quality of Existing Employment Clusters

5.4.1 Table 5-9 below provides an overview of the performance and characteristics of the employment clusters surveyed against some of the criterion assessed in the ELR. This is in order to consider what clusters are performing well or those that based upon PPG/SPG guidance have the potential for intensification, redevelopment, or change of employment use where appropriate.\(^{43}\)

5.4.2 The table suggests that the majority of employment land in LB Enfield is good or average quality and is fit for the purposes that occupy it. There are a few clusters in poor condition and have issues such as C10, C22 and C23. These clusters present opportunities for redevelopment to provide new space for other employment uses as they could function more effectively than at present. See section 5.6 for further consideration of prospects for intensification.

5.4.3 The map which follows the table, Figure 5-9, supports the assessment of strategic road access and PTAL by illustrating the layout of the road network and rail and tube stations.

\(^{43}\) Strategic Road access is based upon whether a cluster is located on a road that is part of the national Strategic Road Network, the Transport for London Road Network or Principal Road as defined in LB Enfield’s most recent Highway Infrastructure Asset Management Plan (2015). If a cluster is not directly located on one of these roads then it is considered as having either indirect or no access to a strategic road.
<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Designation</th>
<th>Overall Quality of Environment (Good / Average / Poor)</th>
<th>Overall Condition of Buildings (Good / Average / Poor)</th>
<th>Parking (Adequate / Inadequate)</th>
<th>Servicing (Adequate / Inadequate)</th>
<th>Public Transport Access (Good / Poor)</th>
<th>Strategic Road Access (Direct / Indirect / No Access)</th>
<th>Vacant / Derelict Land Suitable for Development (Yes / No)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Freezy Water</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C2</td>
<td>Innova Park</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C3</td>
<td>Brimsdown Part A</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C4</td>
<td>Brimsdown Part B</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C5</td>
<td>Brimsdown Part C</td>
<td>SIL</td>
<td>Average</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C6</td>
<td>Meridian Business Park</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C7</td>
<td>Redburn Trading Estate</td>
<td>SIL</td>
<td>Average</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>No</td>
</tr>
<tr>
<td>Cluster Number</td>
<td>Cluster Name</td>
<td>Designation</td>
<td>Overall Quality of Environment (Good / Average / Poor)</td>
<td>Overall Condition of Buildings (Good / Average / Poor)</td>
<td>Parking (Adequate / Inadequate)</td>
<td>Servicing (Adequate / Inadequate)</td>
<td>Public Transport Access (Good / Poor)</td>
<td>Strategic Road Access (Direct / Indirect / No Access)</td>
<td>Vacant / Derelict Land Suitable for Development (Yes / No)</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------</td>
<td>-------------</td>
<td>-------------------------------------------------------</td>
<td>------------------------------------------------------</td>
<td>--------------------------------</td>
<td>-----------------------------------</td>
<td>--------------------------------</td>
<td>--------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>C8</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part A</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C9</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part B</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C10</td>
<td>Montagu Industrial Area North</td>
<td>SIL</td>
<td>Poor</td>
<td>Poor</td>
<td>Adequate</td>
<td>Inadequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>No</td>
</tr>
<tr>
<td>C11</td>
<td>Montagu Industrial Area South</td>
<td>LSIS</td>
<td>Poor</td>
<td>Poor</td>
<td>Inadequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>No</td>
</tr>
<tr>
<td>C12</td>
<td>Aztec 406</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C13</td>
<td>Eley's Estate</td>
<td>SIL</td>
<td>Average</td>
<td>Poor</td>
<td>Inadequate</td>
<td>Inadequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>Cluster Number</td>
<td>Cluster Name</td>
<td>Designation</td>
<td>Overall Quality of Environment (Good / Average / Poor)</td>
<td>Overall Condition of Buildings (Good / Average / Poor)</td>
<td>Parking (Adequate / Inadequate)</td>
<td>Servicing (Adequate / Inadequate)</td>
<td>Public Transport Access (Good / Poor)</td>
<td>Strategic Road Access (Direct / Indirect / No Access)</td>
<td>Vacant / Derelict Land Suitable for Development (Yes / No)</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------</td>
<td>-------------</td>
<td>--------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
<td>--------------------------------</td>
<td>---------------------------------</td>
<td>--------------------------------------</td>
<td>-------------------------------------------------------------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td>C14</td>
<td>Edmonton Eco Park</td>
<td>SIL</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C15</td>
<td>Harbet Road industrial Estate</td>
<td>SIL</td>
<td>Poor</td>
<td>Poor</td>
<td>Inadequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C16</td>
<td>Alma Road</td>
<td>LSIS</td>
<td>Poor</td>
<td>Poor</td>
<td>Inadequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>No</td>
</tr>
<tr>
<td>C17</td>
<td>New Southgate Industrial Estate</td>
<td>LSIS</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C18</td>
<td>Regent's Avenue</td>
<td>LSIS</td>
<td>Poor</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Good</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C19</td>
<td>Oakthorpe Dairy</td>
<td>LSIS</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Inadequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C20</td>
<td>Commercial Road and North Middlesex Estate</td>
<td>LSIS</td>
<td>Average</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>Yes</td>
</tr>
<tr>
<td>Cluster Number</td>
<td>Cluster Name</td>
<td>Designation</td>
<td>Overall Quality of Environment (Good / Average / Poor)</td>
<td>Overall Condition of Buildings (Good / Average / Poor)</td>
<td>Parking (Adequate / Inadequate)</td>
<td>Servicing (Adequate / Inadequate)</td>
<td>Public Transport Access (Good / Poor)</td>
<td>Strategic Road Access (Direct / Indirect / No Access)</td>
<td>Vacant / Derelict Land Suitable for Development (Yes / No)</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------</td>
<td>-----------------</td>
<td>--------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
<td>--------------------------------</td>
<td>-----------------------------------</td>
<td>--------------------------------------</td>
<td>--------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>C21</td>
<td>Langhedge Lane Industrial Estate</td>
<td>LSIS</td>
<td>Poor</td>
<td>Good</td>
<td>Inadequate</td>
<td>Adequate</td>
<td>Good</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C22</td>
<td>Claverings Industrial Estate</td>
<td>LSIS</td>
<td>Poor</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C23</td>
<td>Queensway Industrial Estate</td>
<td>LSIS</td>
<td>Poor</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>Yes</td>
</tr>
<tr>
<td>C24</td>
<td>Kingswood Industrial Estate</td>
<td>Not-Designated</td>
<td>Average</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>No Access</td>
<td>No</td>
</tr>
<tr>
<td>C25</td>
<td>Dairy Crest Depot</td>
<td>Not-Designated</td>
<td>Average</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C26</td>
<td>Brettenham Road Warehouse</td>
<td>Not-Designated</td>
<td>Good</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>No</td>
</tr>
<tr>
<td>C27</td>
<td>Park Avenue Garage</td>
<td>Not-Designated</td>
<td>Average</td>
<td>Poor</td>
<td>Inadequate</td>
<td>Adequate</td>
<td>Good</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>Cluster Number</td>
<td>Cluster Name</td>
<td>Designation</td>
<td>Overall Quality of Environment (Good / Average / Poor)</td>
<td>Overall Condition of Buildings (Good / Average / Poor)</td>
<td>Parking (Adequate / Inadequate)</td>
<td>Servicing (Adequate / Inadequate)</td>
<td>Public Transport Access (Good / Poor)</td>
<td>Strategic Road Access (Direct / Indirect / No Access)</td>
<td>Vacant / Derelict Land Suitable for Development (Yes / No)</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------</td>
<td>--------------</td>
<td>-------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------</td>
<td>-------------------------------------</td>
<td>-------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>C28</td>
<td>Picketts Lock Wholesale</td>
<td>Not-Designated</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C29</td>
<td>GR Wright and Sons</td>
<td>Not-Designated</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C30</td>
<td>Wharf Road Industrial Estate</td>
<td>Not-Designated</td>
<td>Average</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C31</td>
<td>Ripmax</td>
<td>Not-Designated</td>
<td>Average</td>
<td>Poor</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C32</td>
<td>Argon Road Industrial Estate</td>
<td>Not-Designated</td>
<td>Average</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C33</td>
<td>Barrow Well Green Recycling Centre</td>
<td>Not-Designated</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Poor</td>
<td>Indirect</td>
<td>No</td>
</tr>
<tr>
<td>C34</td>
<td>Enfield Town Centre</td>
<td>Town Centre</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Good</td>
<td>Direct</td>
<td>No</td>
</tr>
<tr>
<td>C35</td>
<td>Southgate Town Centre</td>
<td>Town Centre</td>
<td>Good</td>
<td>Good</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Good</td>
<td>Direct</td>
<td>No</td>
</tr>
</tbody>
</table>

Source: AECOM 2016
Figure 5-9 Strategic Transport Routes and Public Transport Accessibility

Source: AECOM 2016.
5.5 Vacant Industrial Land and Vacant Floorspace

Vacant Industrial Land

5.5.1 The GLA's 2010 Industrial Land Supply Baseline study estimated that LB Enfield in the same year had 38.9ha of vacant industrial land and land with vacant buildings, the subsequent 2015 update found that this area had decreased by 37.5% to 24.3ha. Over the same time period 21.2ha of industrial land was redeveloped for other uses in LB Enfield (4.4% of all stock as of 2010). This rate of ‘release’ is over 2.5 times as high as benchmarked in the Land for Industrial and Transport SPG (2012). The rate of decrease in the area of vacant land in LB Enfield and rate of release suggests that the previously vacant land is either being redeveloped for commercial uses or has been released for uses such as residential.

5.5.2 During the field survey, some vacant sites were identified in clusters designated as either SIL or LSIS. These were identified in clusters C11, C15 and C20. The sites are all completely vacant and clear of structures with no plans for future redevelopment yet outlined. Further details are shown in Table 5-10.

Table 5-10 Clusters with Vacant Industrial Land

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Vacant Area (ha)</th>
<th>Vacant Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>C11</td>
<td>Montagu Industrial Area South</td>
<td>0.9</td>
<td>An area of land in the cluster is situated between the northern part of the cluster that is occupied by businesses, Conduit Lane to the south and a recently developed playground to the west.</td>
</tr>
<tr>
<td>C15</td>
<td>Harbet Road Industrial Estate</td>
<td>1.7</td>
<td>The site where the Lee Valley Business Centre used to sit in the north was clear of structures vacant and marketed.</td>
</tr>
<tr>
<td>C20</td>
<td>Commercial Road and North Middlesex Estate</td>
<td>0.3</td>
<td>The site previously occupied by Innovation Schoolwear was vacant and clear of structures.</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>2.9</td>
<td></td>
</tr>
</tbody>
</table>

Source: AECOM 2016.

5.5.3 Other vacant sites within employment clusters were observed during the survey. However, these were either already undergoing redevelopment (e.g. Enfield Distribution Park) or there are plans to redevelopment in the near future. For example, the Stonehill Business Park site in C15 is currently void of structures, but the site was only cleared to replace the original Estate with new premises. Overall very few of LB Enfield’s employment clusters contain vacant sites, and what sites are vacant represent a small proportion of LB Enfield’s total employment land stock.

Vacant Industrial Floorspace

5.5.4 Commercial units available for rent or for sale were seen on 14 clusters during the site survey (C1, C2, C4, C5, C6, C7, C8, C9, C13, C20, C21, C22, C23, C32, C34 and C35). The advertised units that are not under construction are located in Freezy Water (C1) and the
Navigation Park development in Meridian Business Park (C6). The large premises were recently developed and have the potential to provide the Borough’s already successful logistics and distribution sector with more space to grow and thrive. Examples of clusters with smaller commercial premises advertised include C7 (for example, 1,700 – 2,300sqm warehouses) and C20 (a 1,200sqm, warehouse).

5.5.5 Office floorspace is currently available in both of the town centres (C35). In Enfield Town office floorspace is available in Refuge House (100 – 500sqm); likely poor quality floorspace in Southgate is available above retail units along the high street, with some medium-quality space available in Southgate Office Village. Offices of low quality and small floorplate were being marketed in C22.

5.5.6 When considering the surveyed clusters in whole, generally few vacant premises/workspaces were observed during the site survey.

5.6 Prospects for Intensification of B Use Classes

5.6.1 Based upon observations during site surveys and findings of the characteristics above, we have identified clusters, or areas within clusters which have prospects for intensification of B use classes. These areas have been identified through considering the quality of sub-areas within clusters, how intensely land is utilised and whether clusters function well for their current purposes. If a cluster is poor quality, has under-utilised plots of land and/or does not function well as a whole then there may be potential in the future to intensify uses or induce change through targeted interventions. Table 5-11 presents the clusters with prospects for intensification.
Table 5-11 Clusters with Prospects for Intensification or Change

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Cluster Name</th>
<th>Area (ha)</th>
<th>Prospects for Intensification of B Use Classes</th>
</tr>
</thead>
<tbody>
<tr>
<td>C4</td>
<td>Brimsdown Part B</td>
<td>64.1</td>
<td>There are opportunities for intensification between the western border of the A1055 and WAML. The current premises mainly consist of poor quality warehousing and manufacturing space which could be redeveloped and intensified. The width of the corridor could constrain development to smaller premises such as medium manufacturing, warehousing or office floorspace. Error! Reference source not found. shows that the cluster as a whole has a low employment floorspace density.</td>
</tr>
<tr>
<td>C8</td>
<td>Great Cambridge Road and Martinbridge Trading Estate Part A</td>
<td>33.4</td>
<td>Most of the cluster is well built out and has limited possibility for future intensification. Though there are some small units on the southern part of Crown Road which could be refurbished or redeveloped to intensify B class uses. Additionally, the Enfield Car Compound and Travis Perkins also on Crown Road underutilise the plots of land they are located upon.</td>
</tr>
<tr>
<td>C10</td>
<td>Montagu Industrial Area North</td>
<td>9.6</td>
<td>The northern parts of the cluster are used intensely. However, areas in the south near to where C10 borders C11 could be intensified. There are a number of plots that contain plant hire, storage and motor trade businesses that under-utilise the plots of land they are located upon. Road access to the cluster will need to be improved to handle intensifying uses.</td>
</tr>
<tr>
<td>C11</td>
<td>Montagu Industrial Area South</td>
<td>6.2</td>
<td>There are no opportunities for intensification in the area of the cluster south of Conduit Lane. In the area north of the road there are a number of sites occupied by plant hire, waste and motor trade businesses that are under-utilised. Road access to C10 will need to be improved to handle intensification of uses.</td>
</tr>
<tr>
<td>C15</td>
<td>Harbet Road industrial Estate</td>
<td>19.2</td>
<td>There is a large amount of land where Stonehill Business Park and the Lea Valley Business</td>
</tr>
</tbody>
</table>
Cluster Number | Cluster Name | Area (ha) | Prospects for Intensification of B Use Classes
---|---|---|---
C20 | Commercial Road and North Middlesex Estate | 10.1 | Centre used to exist before the buildings on each site were demolished. The land now vacant represents a significant opportunity for developing and intensifying B-use premises in C15. The Stone Business Park site is about to redevelop.
C22 | Claverings Industrial Estate | 3.3 | Much of the Estate is in poor condition, partly vacant and not well laid out. Particular sites with potential for intensification or change include the Dominion Tiles plot and vacant Hall’s Floorings factory.
The Estate is in poor condition, many of the buildings are derelict, under-used or vacant, especially the offices surrounding the central courtyard. Overall, The land which the Estate occupies could be better used, presenting the opportunity to redevelop and intensify B-use classes in it.
Total | | 146.1 | Source: AECOM 2016.
5.7 Recent Development

5.7.1 Recent development of employment floorspace can provide an expression of what types of premises and locations are in demand.

5.7.2 During the cluster survey it was observed that there are or have been a number of recent developments within Enfield’s employment clusters, including new B-use and non B-use premises. In the north the Borough in the Lee Valley, Freezy Water (C1) and Innova Park (C2) both contain large new distribution centres occupied by nationally significant companies (e.g. Iceland and John Lewis), exemplifying that demand for land and premises for B8 use is strong here.

5.7.3 Further south down the Lee Valley, large warehouses have recently been constructed as part of the Navigation Park development within Cluster 6). At the time of survey, the warehouses were not all occupied, with active marketing observed. Occupiers already in place include DPD and Camden Town Brewery. In Brimsdown Part C (C5), the Enfield Distribution Park development (under construction) is offering warehouse space from 1,900–2,300sqm. Based upon occupier trends in C1, C5 and C6 and the known specification of floorspace it is likely that incoming occupiers will be logistics/distribution focused.

5.7.4 In the A10 and Southbury Road Junction sub-area some development has recently occurred in C8 and C9. In C8 a large distribution and technology centre occupied BM Polycro has been developed. The development was the largest non-warehousing development observed during the survey. In C9 small to medium scale warehouses have been built as part of the Lumina Park development, and are mainly occupied by non-B use occupiers (e.g. Toyota, City Electrical Factors and Jump in Trampoline Arenas). New warehouses of the same scale as in C9 have also been constructed in C13. The premises are also similarly occupied mostly by non-B use tenants such as N&C Tiles and Bathrooms, Hilti and DMARK.

5.7.5 Based upon consulting with property market agents, non-B use businesses are attracted to locate around the A10 and Southbury Road Junction (including within clusters C8 and C9), due to the retail focus of the sub-area. With the retail developments already present in the sub area (e.g. Enfield retail park) generating high footfall and the high number of cars passing along the A10, the sub-area is more attractive for non-B use businesses to locate than other sub-areas such as Brimsdown. The attractiveness of the sub-area as a location for non-B uses corresponds with Error! Reference source not found., which shows that clusters along the A10 and Southbury Road Junction sub-area have high proportions of non-B use floorspace in comparison to other clusters in the Borough.

5.7.6 A limited number of dwellings have been built in LB Enfield’s employment clusters. The smallest residential developments have been in C8 and C18. A block of flats on a small plot of land has been constructed in C8 on the north western corner of the A10 and Southbury Road junction. In northern part of C18 two small sets of houses have been constructed these are separated from the remainder of the cluster by landscaping. C17

44 Figures rounded to the nearest hundred.
46 It is understood that BM Polycro may be moving from their current premises on the Great Cambridge and Martinbridge Trading Estate. https://propertylink.estatesgazette.com/property-details/6190673-crown-road-enfield-en1-1tx.
has experienced a higher amount of redevelopment into residential. Much of the cluster has been redeveloped alongside the Ladderswood Housing Estate to provide 517 new dwellings in total\(^\text{47}\).

5.7.7 Overall, the survey showed that the majority of commercial space recently and currently being developed consists of warehouse space for B8 uses or premises for sui generis uses. A limited amount of non-warehouse commercial development was observed during site survey, of which none included dedicated office floorspace. There has been some residential development within cluster boundaries, but the scale is limited except in C17.

5.8 Key Sectors

5.8.1 The survey supplemented with desktop analysis identified what the key sectors in LB Enfield’s employment clusters are and what sectors could have potential for growth in the future. These are namely: logistics and distribution; food preparation and manufacturing; and high technology manufacturing.

Logistics / Distribution

5.8.2 As evidenced above in the sub-area reviews and recent development section, logistics and distribution is currently and likely to become more important to the LB Enfield’s economy in the future. LB Enfield already has a strong distribution sector and businesses including Asda, DPD, John Lewis, Lidl and Tesco all have large centres in the Borough. Logistics and distribution are concentrated in the larger industrial estates of the Borough such as the three Brimsdown clusters (C3, C4, and C5), Great Cambridge and Martinbridge Trading Estate Part A and Part B (C8 and C9) and Aztec 406 (C12).

5.8.3 Based on recent development trends, observations and views from the commercial market, the sector looks set to continue to grow in the future. There are examples of new developments Enfield Distribution Park (ENDP)\(^\text{48}\) in C5 and Navigation Park\(^\text{49}\) in C6. Both do and will contain large premises dedicated to businesses in the sector.

5.8.4 ENDP is promoted as a prime London location for distribution activities. The scale of the site allows it is able to accommodate a single building of up to 120,000sqft (c.11,150sqm). Units can be tailored in line with individual occupier requirements. At Navigation Park there are 8.8 acres of design and build opportunity for warehouse / industrial units from 41,890sqft (c.3,900sqm) up to 197,820sqft (c.18,400sqm). Navigation Park is marketed as having ‘immediate’ access to the M25/A406 and of high quality specification. The units are grade A which are ‘the first carbon neutral industrial buildings in London’ (BREEAM rating Excellent) and EPC rating A+.

5.8.5 The scale and quality of these developments suggest there is strong demand for high specification industrial and warehousing space in LB Enfield. Demand is likely to come from established companies which have a strong financial base seeking locations near inner London markets and which are willing to pay well for quality builds.

5.8.6 New business rates that will apply from April 2017 will increase, on average, by 14% for

\(^{47}\) [http://www.ladderswoodregen.co.uk/index.html](http://www.ladderswoodregen.co.uk/index.html), accessed December 2016.

\(^{48}\) [http://www.endp.co.uk/](http://www.endp.co.uk/)

retail highstreet shops, while rates for online retailers operating from warehouse
distribution units out of town will increase by 2%. The cost of rents and rates paid by online
retailers are therefore much lower than highlight street locations. This cost differential,
when passed in part to the consumer, is a key driver of demand for distribution/
warehousing space (and the contraction of shop space on highstreets).50

Food Processing

5.8.7 There are a high number of businesses specialising in food preparation, manufacturing
and distribution in LB Enfield. Most of the clusters observed during the survey had some
form of business in the sector. These businesses vary in scale. Principal examples are
Greggs and Warburtons bakeries located in Brimsdown Part B (C4), the Coca Cola
production facility in Eley’s Estate (C13) and Arla’s Oakthorpe dairy in their own dedicated
premises next to the North Circular (C18). All four manufacture their products on site for
onward distribution.

5.8.8 There are a high number of smaller food businesses who focus on specific market niches
(e.g. food distributors servicing the local eastern Mediterranean communities). These
businesses can be found in a high number of the employment clusters which have
considerably different characteristics, occupying, primarily, poorer quality premises.

5.8.9 It was notable that small newly developed units were being occupied by businesses
involved in the food industry, suggesting that the sector is growing and new premises may
be needed to house its growth in the future unless current premises are used more
intensely.

Knowledge and High Technology Industries

5.8.10 A number of knowledge and high technology firms were observed during the site survey.
The businesses are not all in one specific sector and there are no obvious clusters of high
technology businesses in the same sector. However, they do give the Borough a
foundation to build upon to make knowledge and high technology sectors a more
significant part of LB Enfield’s economy in the future. The businesses include BM Polyco
(C8), Kevin Hughes (C1) and Metaswitch Networks (C36). BM Polyco and Kevin Hughes are
both focused upon advanced manufacturing (laboratory equipment and radar
respectively), while Metaswitch Networks develops network software.

5.8.11 The three businesses are all located in different clusters and occupy very good quality
space will have been purpose built for the businesses. The premises that BM Polyco and
Kevin Hughes occupy were both recently developed, while Metaswitch Networks’ offices
were likely developed during the late 1980s or early 1990s. The locations of the businesses
differ in that BM Polyco and Kevin Hughes are located on industrial estates, while
Metaswitch Networks is located on the edge of the town centre.

5.8.12 It should be noted that based upon consulting with property market agents bringing
higher value sectors into the Borough was previously un-successful. The offices present in
the Innova Park (C2) were originally marketed as a science park, but failed to attract
scientific firms due to the Borough’s lack of higher education connections, which are more
limited today with the closure of Middlesex University’s Trent Park and Ponders End
campuses.

50 Financial Times, (7th February 2017); Rise in business rates favour online retailers over high street
5.9 Activities Supporting the Functioning of Inner London

5.9.1 LB Enfield’s employment clusters contain a number of businesses in sectors that support the CAZ and the rest of Inner London. The first point of call is the Borough’s distribution industry. One of the largest examples is Lidl’s distribution centre in Aztec 406 (C12). The distribution centre acts as the company’s regional headquarters and as the main distribution centre its 100 stores in Greater London\(^51\). The other large supermarket distribution centres run by Tesco and Asda likely perform similar roles, though Tesco’s location near to the M25 also positions it as a centre that may service the wider region and not have an Inner and Greater London wide focus. Similar examples on the periphery of Greater London include the large Sainsbury’s depot in Epping Forest near to the border that the local authority shares with LB Enfield.

5.9.2 The UK is continuing to buy more goods online and less on the high-street, with this brings changes to the way logistics and distribution networks operate\(^52\). Rather than simply delivering goods to a store as the end point, goods can require delivery to anywhere on the UK’s accessible road network. Businesses that are likely to form part of the distribution network for online retailers include DPD in C6, FedEx in C3 and C6 and Yodel in C1. Some goods will likely flow out from Greater London to the wider region through the facilities that these businesses occupy in the Borough, but goods will also flow in the opposite direction and moved into Inner London and the CAZ.

5.9.3 The other main support industry to Inner London observed during the site survey was food. Food as discussed above is one of LB Enfield’s key sectors, it may not be showing the same growth potential as distribution currently, but that could change if an economic shift were to happen in the coming future. Based upon consultations with property market agents, the large food manufacturers who have manufacturing and distribution facilities in the Borough (Arla, Coca Cola, Greggs and Warburtons) export their products to Inner London to be sold. They also service the wider London region and likely export some goods outside of the capital. However, the main focus of the businesses is to service the Greater London. This is partly due to the Borough’s good strategic road connections. The A10 is a good thoroughfare for transporting goods down into the CAZ and the North Circular offers fast access to other roads which travel to Inner London such as the A12 and Hendon Road.

5.9.4 Some smaller food businesses in LB Enfield also likely ship goods to Inner London and the CAZ. London Bread and Cake Company in Eley’s Estate bake goods and distribute them across London (including Inner London and the CAZ) and into neighbouring counties (e.g. Essex, Hertfordshire and Kent)\(^53\). Sova Foods, also located in Eley’s Estate specialise in the import of Jewish foods, which are likely to be transported for consumption in the large Jewish community around Stamford Hill\(^54\).

5.10 Summary

5.10.1 AECOM’s qualitative survey of employment clusters within LB Enfield compromised site visits to 35 separate clusters. This was combined with some elements of desktop


\(^54\) [http://www.sovafoods.co.uk/](http://www.sovafoods.co.uk/), accessed December 2016.
research. The clusters include: 14 SIL; nine LSIS, ten non-designated employment areas; and two town centres.

5.10.2 The assessment was conducted based on a set of site appraisal criteria (which were agreed with the Council in advance) from which detailed analysis was carried out to identify the typologies of employment land within the Borough. Our survey identified that employment land within LB Enfield consists of a number of larger, established business locations (Brimsdown and Central Leeside), contrasted by a number of smaller business centres (Redburn Trading Estate and Kingswood Industrial Estate) and town centres with some B-use premises (Enfield Town and Southgate). Clustering of employment uses was typically seen in larger employment areas which contain a high number of logistics and distribution warehouses, which hold businesses not typically associated with agglomeration economies.

5.10.3 Our assessment concludes that the majority of clusters surveyed are functioning well for the uses contained within them, have high occupancy rates and support a diverse range of business types. The Borough’s SIL areas comprise a significantly large amount of strategic quality land in Greater London and are generally in good or very good condition accommodating many medium and large firms with a focus on supermarket logistics, food processing and increasingly e-commerce fulfilment centres, with some retail/trade counter uses also observed. The Borough’s LSIS are more mixed in character with some good quality examples (e.g. Oakthorpe Dairy C19), and several poorer ones, with a prevalence of sui-generic and non-B uses in several instances. Non-designated clusters vary in character from underused/derelict land to sites of reasonable quality. Office uses are concentrated mostly in or adjacent to Enfield (C34) and Southgate (C35) town centres, with some additional fairly new examples in the south of Innova Park (C2) SIL, and occasional examples within LSIS. Stock is mostly characterised by medium sized buildings of fair quality, some in multiple-occupancy others singly used. Smaller units are uncommon with some examples at Chase Road, Southgate (C35).

5.10.4 There is little evidence that industrial employment land has been lost to pure residential or residential led mixed–use development. Development in clusters is focused upon either large warehousing or small to medium warehousing and manufacturing units. The large warehousing is being occupied by logistics and distribution businesses, while medium to small units are being occupied by a high number of non-B use businesses. No office development within any employment clusters was observed during the site survey.

5.10.5 The survey found that there are a number of large, medium and small scale opportunities for redevelopment and intensification within clusters. There are major opportunities in clusters such as Harbet Road Industrial Estate, Claverings Industrial Estate and both parts of the Montagu Industrial Area, smaller opportunities are present in clusters including Brimsdown Part B. Many of the sites surveyed within the Borough serve a strategic role, and our demand assessment in Chapter 7 helps to clarify planning options for the future role of the 35 employment clusters surveyed.
6. Commercial Property Market

6.1 Introduction and Approach

6.1.1 This section provides an assessment of the trends in industrial and office property markets. It examines Enfield’s commercial property market within the context of the wider FEMA and covers the following key indicators:

- Stock and distribution by size of units
- Premises and occupiers
- Rental values; and
- Vacancy, availability and net absorption.

6.2 Industrial Markets

Supply and Distribution of Stock

6.2.1 The Borough has a large supply of industrial floorspace. There are a number of large SILs and medium scale LSIS in the Borough. The largest concentrations are located along the Upper Lee Valley around Brimsdown, Central Leeside and the A10 and Southbury Road Junction. The main Brimsdown SIL is the second largest in London behind Old Oak and Park Royal. Other smaller clusters of stock are scattered throughout the remainder of the Borough. The most notable characteristic of the Borough’s industrial stock is the high number of logistics and distribution warehouses, which are a prominent feature in many of the larger clusters (e.g. Aztec 406 and Innova Park).

6.2.2 A breakdown of industrial floorspace across local authorities in the FEMA is presented in Table 6-1.

Table 6-1 Stock of Industrial Floorspace (2016)

<table>
<thead>
<tr>
<th>Industrial Floorspace (sqm)</th>
<th>% of Overall Stock</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td>1,271,800</td>
</tr>
<tr>
<td>Barnet</td>
<td>214,400</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>404,900</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>271,700</td>
</tr>
<tr>
<td>Haringey</td>
<td>587,500</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>284,300</td>
</tr>
<tr>
<td>Redbridge</td>
<td>218,900</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>481,700</td>
</tr>
<tr>
<td>Welwyn Hatfield</td>
<td>627,400</td>
</tr>
<tr>
<td>FEMA</td>
<td>4,362,500</td>
</tr>
</tbody>
</table>

6.2.3 Table 6-1 shows that LB Enfield supports the largest quantum of industrial floorspace (1,271,800sqm), representing almost a third (29.2%) of the FEMA total. LB Enfield has over double the quantum of floorspace than the next highest local authority, Haringey (584,500sqm), and represents nearly half (45.8%) of all industrial stock within the boroughs in London.

6.2.4 Figure 6-1 presents the changing stock of industrial floorspace across the nine local authority areas in the FEMA from 2007, covering the period of data availability.

Figure 6-1 Stock of Industrial Floorspace (2009 to 2016)


6.2.5 It shows that trends across the FEMA have been relatively stable over this period. Overall, the stock of industrial floorspace in LB Enfield grew by 0.9% (11,200sqm), a rate slightly lower than across the FEMA (1.2%), where stock increased by 53,700sqm. Only Hertsmere (21,400sqm) and Haringey (18,100sqm) saw a greater increase in stock over this period.

6.2.6 Within this trend however are divergent rates of change: manufacturing space is falling but this is being offset by the growth in logistics space. E-commerce firms for example are one sector which is driving the demand for shed space and there is evidence from developers such as Segro that there is pent up demand in this sector.

6.2.7 In the context of industrial supply contraction and demand for land from certain B use classes and other uses such as residential etc., stakeholders highlighted the need for a more efficient use of industrial land. This could include multi-tier commercial units and/or mixed use development. Concepts such as multi-storey warehousing are relatively untested, with few examples in the UK, due to viability thresholds rather than construction or technological constraints.

6.2.8 Comparison between the quantum of floorspace and number of units provides an indication of the average (mean) unit size of industrial units. Figure 6-2 presents these results for the nine local authorities in the FEMA.
Figure 6-2 Average Size of Industrial Units (2016)


6.2.9 Figure 6-2 shows that the average industrial unit in LB Enfield (2,500sqm) is the third largest in the FEMA and the largest of the London local authorities, with only Welwyn Hatfield (3,400sqm) and Broxbourne (2,800sqm) having a larger average size. Given the propensity for storage/distribution (B8) activities to generally occupy larger units, relative to light industry/general industrial (B1c/B2) uses, the large average unit size implies that Enfield supports a relatively large share of storage/distribution activity.

Premises and Occupiers

6.2.10 Table 6-2 presents a breakdown of the office stock in LB Enfield by unit size.

Table 6-2 Industrial Stock by Unit Size (2016)

<table>
<thead>
<tr>
<th>Unit Size (sqm)</th>
<th>Units</th>
<th>Floorspace (sqm)</th>
<th>% of Floorspace Stock</th>
<th>Vacancy (%)</th>
<th>FEMA Vacancy (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 250</td>
<td>86</td>
<td>11,400</td>
<td>0.9%</td>
<td>0.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>250 to 500</td>
<td>60</td>
<td>21,900</td>
<td>1.7%</td>
<td>0.0%</td>
<td>0.9%</td>
</tr>
<tr>
<td>500 to 1,000</td>
<td>80</td>
<td>59,000</td>
<td>4.6%</td>
<td>0.9%</td>
<td>0.6%</td>
</tr>
<tr>
<td>1,000 to 2,000</td>
<td>98</td>
<td>144,400</td>
<td>11.3%</td>
<td>1.2%</td>
<td>2.7%</td>
</tr>
<tr>
<td>2,000 to 10,000</td>
<td>163</td>
<td>700,100</td>
<td>54.9%</td>
<td>4.6%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Over 10,000</td>
<td>20</td>
<td>337,500</td>
<td>26.5%</td>
<td>5.4%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Total</td>
<td>507</td>
<td>1,274,300</td>
<td>-</td>
<td>4.7%</td>
<td>2.5%</td>
</tr>
</tbody>
</table>


6.2.11 Table 6-2 shows that the 183 units in LB Enfield over 2,000sqm in size represent 36.1% of units and over four-fifths (81.4%) of LB Enfield’s total floorspace stock. In terms of
vacancy, a clear relationship is observed with unit size; each step up in unit size band is
associated with a higher vacancy rate. No vacancy is identified in the data for units
500sqm or lower, while comparison with **Table 6-2** indicates that nearly half (45.5%) of all
vacant industrial floorspace across the FEMA is in units in LB Enfield over 2,000sqm in
size. This suggests tighter market conditions for smaller units compared with larger ones.

**Rental Values**

6.2.12 **Table 6-3** presents average industrial rents for each of the local authorities in the FEMA.

<table>
<thead>
<tr>
<th></th>
<th>Rental Values (£ per sqm)</th>
<th>Total Rent (£m)</th>
<th>Total Rent as % of FEMA Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td>£102</td>
<td>£124</td>
<td>30.7%</td>
</tr>
<tr>
<td>Barnet</td>
<td>£111</td>
<td>£23</td>
<td>5.8%</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>£83</td>
<td>£33</td>
<td>8.1%</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>£78</td>
<td>£21</td>
<td>5.1%</td>
</tr>
<tr>
<td>Haringey</td>
<td>£115</td>
<td>£67</td>
<td>16.6%</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>£81</td>
<td>£23</td>
<td>5.6%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>£80</td>
<td>£17</td>
<td>4.3%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>£92</td>
<td>£44</td>
<td>10.9%</td>
</tr>
<tr>
<td>Welwyn Hatfield</td>
<td>£86</td>
<td>£53</td>
<td>13.0%</td>
</tr>
<tr>
<td>FEMA</td>
<td>£95</td>
<td>£404</td>
<td>-</td>
</tr>
</tbody>
</table>

*Source: CoStar 2016; AECOM 2016.*

6.2.13 **Table 6-3** shows that industrial floorspace in LB Enfield commands the third highest rental
value across the FEMA (£102 per sqm), behind Haringey (£115 per sqm) and Barnet (£111 per sqm). Rents LB in Enfield are on average £7 per sqm higher than the FEMA average. The average rental values across London boroughs in the FEMA (£102 per sqm) are £20 (or 24%) greater than the non-London equivalent (£83 per sqm), reflecting the locational
benefits for industrial businesses of being located closer to central London.

6.2.14 **Figure 6-3** presents the changing rental values across the FEMA between 2009 and 2016.
6.2.15 **Figure 6-3** shows that industrial rents have increased across the FEMA. Rents grew in LB Enfield by £30 (40.8%) over this period, representing the largest absolute and proportional increase of all local authorities in the FEMA. Of the additional £96.8m achieved in total rent across the FEMA over period, LB Enfield has captured 40.6% (£39.3m). Of all local authorities in the FEMA only Epping Forest (~£13 per sqm) saw a decline in rental values, equivalent to 14.4% over this period.

### Vacancy, Availability and Net Absorption

6.2.16 CoStar records floorspace being actively marketed in terms of vacancy and availability. Availability represents the floorspace that is either vacant or occupied and available for re-let. Available space gives an indication of future vacancy. A positive gap between the vacancy rate and availability rate indicates that there may be a future risk of increased vacancy.

6.2.17 **Table 6-4** presents the current vacancy and availability rates of industrial premises.

<table>
<thead>
<tr>
<th>Local Authority</th>
<th>Vacancy (sqm)</th>
<th>Vacancy (%)</th>
<th>Availability (sqm)</th>
<th>Availability (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td>59,900</td>
<td>4.7%</td>
<td>71,800</td>
<td>5.6%</td>
</tr>
<tr>
<td>Barnet</td>
<td>4,500</td>
<td>2.1%</td>
<td>6,900</td>
<td>3.2%</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>10,200</td>
<td>2.5%</td>
<td>13,900</td>
<td>3.4%</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>6,500</td>
<td>2.4%</td>
<td>7,300</td>
<td>2.7%</td>
</tr>
<tr>
<td>Haringey</td>
<td>4,800</td>
<td>0.8%</td>
<td>8,500</td>
<td>1.4%</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>4,400</td>
<td>1.5%</td>
<td>8,600</td>
<td>3.0%</td>
</tr>
</tbody>
</table>
6.2.18 **Table 6-4** shows that LB Enfield has the highest rate of vacancy (4.7%) across the local authorities in the FEMA, 2.2 percentage points higher than across the FEMA. The vacancy rate is nearly double that of Broxbourne (4.7%), the second highest. The 59,900sqm of vacant industrial floorspace in LB Enfield represents 54% of all vacant floorspace across the FEMA, and 78.2% in the London boroughs in the FEMA. LB Enfield’s availability rate (5.6%) is also the highest across each local authority, 2.2 percentage points higher than the FEMA as a whole, while representing 47.9% of all available floorspace.

6.2.19 **Figure 6-4** presents the vacancy rates across the FEMA since 2007.

![Figure 6-4 Vacancy Rates by Local Authority Area and the Overall FEMA (2007 to 2016)](source: CoStar 2016)

6.2.20 **Figure 6-4** shows a general fall in vacancy rates across the FEMA since 2009. Across the FEMA vacancy fell steadily from 7.8% in 2009 to 2.5% in 2016. In LB Enfield, while vacancy fell from 7.6% in 2009 to 4.7% in 2012, reflecting the broader pattern across the FEMA. However, from 2012 onwards, LB Enfield is the only local authority that has not seen vacancy rates fall across the FEMA.

6.2.21 **Figure 6-5** presents net absorption values 2009 to 2016. Net absorption provides another angle on demand. The measure expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next. Net absorption is not the reverse of vacancy as vacancy is an expression of the level of non-occupancy against total stock. Negative absorption in 2016 is likely to be due to land and premises
being cleared for redevelopment, which has yet to come forward.

Figure 6-5 Net Absorption of Industrial Floorspace in Enfield and the FEMA (2007 to 2016)

![Graph showing net absorption of industrial floorspace in Enfield and the FEMA (2007 to 2016)](image)


6.2.22 Figure 6-5 shows that net absorption has been generally positive across this period, indicating positive demand for industrial occupation. Overall net absorption was positive in LB Enfield (23,200sqm). However, while Table 6-4 shows that LB Enfield represents 29.2% of all industrial floorspace, the Borough accounted for only 14.1% of positive net absorption across the FEMA (164,300). Only in 2009 and 2016 was net absorption negative across both LB Enfield and the FEMA, with negative net absorption in LB Enfield contributing 95.6% of the FEMA total in the latest year.

6.2.23 Consultations with industrial property market agents and other businesses stakeholders suggested that the industrial land and premises market in the borough is tightening. The loss of industrial land to other uses is one driver. Loss has pushed out some businesses and driven some rental values up where demand is constrained by supply. Locations which can offer well located, suitable premises at relatively low cost are therefore in demand.

6.3 Office Markets

Supply and Distribution of Stock

6.3.1 By comparison to LB Enfield’s industrial stock the office market is small. Supply is mainly focused two of the Borough’s town centres, Enfield Town and Southgate, which have a number of dedicated office blocks within and close to their boundaries as well as offices located above shops. Notable examples include Range House close to Enfield Town and the Grange in Southgate. Outside of the town centres, some office floorspace can be found in SIL, for example at Innova Park (C2), and at LSIS such as at Claverings Industrial Estate (C22) and Queensway (C23), though not of significant quantum. Further ancillary offices can be found attached to other premises such as warehouses and manufacturing plants in the SIL and LSIS areas.

6.3.2 According to CoStar data, the FEMA currently supports 1,841,400sqm of office...
floorspace. Table 6-5 provides a breakdown of the distribution of floorspace across each local authority area.

**Table 6-5 Stock of Office Floorspace (2016)**

<table>
<thead>
<tr>
<th>Cluster Number</th>
<th>Office Floorspace (sqm)</th>
<th>Share of FEMA Floorspace (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td>217,500</td>
<td>11.8%</td>
</tr>
<tr>
<td>Barnet</td>
<td>365,800</td>
<td>19.9%</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>74,100</td>
<td>4.0%</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>75,200</td>
<td>4.1%</td>
</tr>
<tr>
<td>Haringey</td>
<td>215,700</td>
<td>11.7%</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>271,700</td>
<td>14.8%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>213,100</td>
<td>11.6%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>106,500</td>
<td>5.8%</td>
</tr>
<tr>
<td>Welwyn Hatfield</td>
<td>301,900</td>
<td>16.4%</td>
</tr>
<tr>
<td>FEMA</td>
<td>1,841,400</td>
<td>-</td>
</tr>
</tbody>
</table>

*Source: CoStar 2016; AECOM 2016.*

6.3.3 **Table 6-5** shows that LB Enfield supports 217,500sqm of office floorspace, the fourth largest local authority in the FEMA, representing 11.8% of all office floorspace. Across the FEMA approximately 1,118,600sqm (60.7%) of office floorspace is in London, of which Enfield represents under a fifth (19.4%).

6.3.4 The quality of the Borough’s office stock has already been considered in the supply section of this study (Section 5). When the supply analysis is combined with the analysis on stock it shows that the options for office occupiers are currently limited in Enfield. There are only a limited number of larger dedicated office blocks, of which the majority are in the town centres. Small offices are available above retail units and some offices are scattered in around certain employment clusters, but the number is limited. No new speculative office developments were observed during the site survey.

6.3.5 **Figure 6-6** presents the changing stock of office floorspace across the nine local authority areas in the FEMA from 2007, covering the period of data availability.

---

55 [http://www.costar.co.uk](http://www.costar.co.uk), accessed November 2016.
6.3.6 Figure 6-6 shows that trends in office floorspace stock have been relatively static across this period. LB Enfield has seen a slight contraction in its stock over this period of 900sqm, equivalent to 0.4% of current stock, with only Broxbourne (-7,700sqm) showing a greater contraction over this period. Overall the quantum of stock across the FEMA increased by 41,200sqm (2.3%) across this period. While both Figure 6-6 and Table 6-5 indicate the greater relative stock is in the London boroughs, there is some evidence of the local authorities outside of London strengthening. Of the net change in floorspace across the FEMA, 85.2% (35,100sqm) is observed outside of London.

6.3.7 Comparison between the quantum of floorspace and number of units provides an indication of the average (mean) unit size of offices. Figure 6-7 presents these results for the nine local authorities in the FEMA.
Figure 6-7 Average Size of Office Units (2016)

![Average Office Unit Size (sqm)](image)


6.3.8 **Figure 6-7** shows that the average unit size in LB Enfield is 729.9sqm. This is 104.4sqm (12.5%) lower than the FEMA average (834.3sqm). Of the five London boroughs, only Redbridge (1,087sqm) has a larger average size. Excluding Epping Forest, the other local authorities (Broxbourne, Hertsmere and Welwyn and Hatfield) located outside of London have larger average units (1,986sqm, 1,319sqm and 903sqm respectively).

Premises and Occupiers

6.3.9 **Table 6-6** presents a breakdown of the office stock in Enfield by unit size.

<table>
<thead>
<tr>
<th>Unit Size (sqm)</th>
<th>Units</th>
<th>Floorspace (sqm)</th>
<th>% of Floorspace Stock</th>
<th>Vacancy (%)</th>
<th>FEMA Vacancy (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 250</td>
<td>175</td>
<td>21,900</td>
<td>10.1%</td>
<td>2.9%</td>
<td>1.1%</td>
</tr>
<tr>
<td>250 to 500</td>
<td>36</td>
<td>12,700</td>
<td>5.8%</td>
<td>0.0%</td>
<td>1.3%</td>
</tr>
<tr>
<td>500 to 1,000</td>
<td>30</td>
<td>21,400</td>
<td>9.8%</td>
<td>4.4%</td>
<td>1.6%</td>
</tr>
<tr>
<td>1,000 to 2,000</td>
<td>35</td>
<td>49,700</td>
<td>22.8%</td>
<td>0.5%</td>
<td>3.0%</td>
</tr>
<tr>
<td>2,000 to 10,000</td>
<td>21</td>
<td>84,100</td>
<td>38.6%</td>
<td>1.0%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Over 10,000</td>
<td>2</td>
<td>28,000</td>
<td>12.9%</td>
<td>0.0%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Total</td>
<td>299</td>
<td>217,800</td>
<td>-</td>
<td>1.1%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>


6.3.10 **Table 6-6** shows that over half (58.5%) of office units in LB Enfield are under 250sqm in size, equating to 10.1% of total stock. The majority of floorspace (51.5%) is provided by
the 23 units sized over 2,000sqm. In terms of vacancy, the greatest rate is in units sized between 500 to 1,000sqm (4.4%), while vacancy is also high in the under 250sqm sized units. By contrast, across the FEMA vacancy is second lowest (1.6%) and lowest (1.1%) within these categories. Within LB Enfield, decreasing rates of vacancy with increasing unit sizes, together with the increasing stock associated with each size band, suggests that the availability of grow-on space may potentially constrain the growth of businesses as they move up the accommodation ladder. This also entails that there may be some unmet demand for medium to large offices in the Borough. However, consultations with property market did reveal that demand for offices in LB Enfield is likely from public bodies and non-businesses organisations such as charities. Demand created by businesses in the Borough was said to be small. The Borough is not by business as a major office location.

Rental Values

6.3.11 Table 6-7 presents average office rents for each of the local authorities in the FEMA.

<table>
<thead>
<tr>
<th>Local Authority</th>
<th>Rental Values (£ per sqm)</th>
<th>Total Rent (£m)</th>
<th>Total Rent as % of FEMA Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td>£182</td>
<td>£39</td>
<td>11.8%</td>
</tr>
<tr>
<td>Barnet</td>
<td>£212</td>
<td>£73</td>
<td>22.0%</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>£175</td>
<td>£13</td>
<td>3.8%</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>£158</td>
<td>£12</td>
<td>3.6%</td>
</tr>
<tr>
<td>Haringey</td>
<td>£163</td>
<td>£35</td>
<td>10.5%</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>£210</td>
<td>£55</td>
<td>16.5%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>£139</td>
<td>£29</td>
<td>8.7%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>£173</td>
<td>£18</td>
<td>5.3%</td>
</tr>
<tr>
<td>Welwyn Hatfield</td>
<td>£203</td>
<td>£58</td>
<td>17.6%</td>
</tr>
<tr>
<td>FEMA</td>
<td>£182</td>
<td>£331</td>
<td>-</td>
</tr>
</tbody>
</table>


6.3.12 Table 6-7 shows that LB Enfield has the fourth highest rental values of office floorspace (£182 per sqm) in the FEMA, and the second largest in London to Barnet (£212 per sqm). Office floorspace across the FEMA generates £331m in rental value, of which Enfield represents 11.8%, broadly in line with its share of stock. £194m (or 58.4%) of the total rent accrued in the FEMA is in London, which is 2.3% lower than its share of floorspace (60.7%), indicating that office floorspace is relatively more valuable in the local authorities outside of London excluding Broxbourne.

6.3.13 Figure 6-8 presents the changing rental values across the FEMA between 2007 and 2016.
6.3.14 **Figure 6-8** shows that the rental values across the FEMA showed a slight decline over the period 2007-2014, although the most recent two years indicate some increase. Across this period rents have increased by £25 per sqm in LB Enfield, increasing at a rate (16%) greater than across the FEMA as a whole (10%), which saw a £16 increase. All of the growth in rental values across both LB Enfield and the FEMA has been since 2014, equivalent to £36 per sqm and £28 per sqm respectively.

6.3.15 Increasing rental values in LB Enfield and the Borough’s non-growing supply of office floorspace point to increasing demand for offices, with a lack of additional supply to meet demand driving up rents for current office stock. The Borough with the likely highest visible amount of demand is Welwyn and Hatfield which contributed the majority of new office floorspace in the FEMA between 2007 and 2016 (56.1%). Rents in Welwyn and Hatfield have increased at a higher rate (17.8%) over the time period than Enfield (16.2%) and FEMA (9.6%). Pointing to a combination of additional supply coming forward which is not enough to meet current demand, meaning that rents are continuing to increase.

**Vacancy, Availability and Net Absorption**

6.3.16 CoStar records floorspace being actively marketed in terms of vacancy and availability. Availability represents the floorspace that is either vacant or occupied and available for relet. Available space gives an indication of future vacancy. A positive gap between the vacancy rate and availability rate indicates that there may be a future risk of increased vacancy. **Table 6-8** presents these results.
### Table 6-8 Vacancy and Availability of Office Premises

<table>
<thead>
<tr>
<th></th>
<th>Vacancy (sqm)</th>
<th>Vacancy (%)</th>
<th>Availability (sqm)</th>
<th>Availability (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td>2,500</td>
<td>1.1%</td>
<td>3,300</td>
<td>1.5%</td>
</tr>
<tr>
<td>Barnet</td>
<td>20,900</td>
<td>5.7%</td>
<td>33,200</td>
<td>9.1%</td>
</tr>
<tr>
<td>Broxbourne</td>
<td>1,900</td>
<td>2.5%</td>
<td>2,100</td>
<td>2.8%</td>
</tr>
<tr>
<td>Epping Forest</td>
<td>400</td>
<td>0.5%</td>
<td>1,100</td>
<td>1.5%</td>
</tr>
<tr>
<td>Haringey</td>
<td>1,200</td>
<td>0.5%</td>
<td>1,300</td>
<td>0.6%</td>
</tr>
<tr>
<td>Hertsmere</td>
<td>10,900</td>
<td>4.0%</td>
<td>18,200</td>
<td>6.7%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>4,100</td>
<td>1.9%</td>
<td>5,900</td>
<td>2.7%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>4,100</td>
<td>3.9%</td>
<td>4,300</td>
<td>4.0%</td>
</tr>
<tr>
<td>Welwyn Hatfield</td>
<td>14,800</td>
<td>4.9%</td>
<td>23,100</td>
<td>7.7%</td>
</tr>
<tr>
<td>FEMA</td>
<td>60,800</td>
<td>3.3%</td>
<td>92,500</td>
<td>5.0%</td>
</tr>
</tbody>
</table>


6.3.17 Table 6-8 shows that Enfield has only 2,500sqm of vacant floorspace, equivalent to 1.1% of total stock. This rate is 2.2 percentage points lower than the FEMA average (3.3%). Only Epping Forest and Haringey (both 0.5%) have lower vacancy rates across the FEMA. While LB Enfield represents 11.8% of all floorspace, it contributes only 4% of vacant floorspace across the FEMA. LB Enfield’s availability rate (1.5%) is joint second-lowest across the FEMA, with only Haringey (0.6%) showing a lower rate. It is 3.5 percentage points lower than the FEMA average (5%).

6.3.18 Figure 6-9 presents the vacancy rates across the FEMA since 2007.

**Figure 6-9 Vacancy Rates by Local Authority Area and the Overall FEMA (2007 to 2016)**
6.3.19 Figure 6-9 shows a general decline in vacancy rates across the FEMA, indicating an increase in occupancy. Overall the level of vacancy across the FEMA peaked in 2011 (8.8%) and has since fallen year-on-year to its current rate of 3.3%. Vacancy rates in LB Enfield show a similar profile to the FEMA, peaking in 2009 (8.4%) before gradually declining. Relative to other local authorities in the FEMA LB Enfield’s performance has also improved over this period, moving from having the third highest vacancy rates in 2007 (lower than only Welwyn Hatfield and Hertsmere) to the third lowest currently.

6.3.20 Net absorption values are shown in the following figure. The measure expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Figure 6-10 shows that net absorption have been broadly positive across the Borough and the FEMA across this period. Over this period net absorption in LB Enfield equated to 11,800sqm, or 5.4% of current floorspace stock, while across the FEMA this rate was equal to 6.6%. Net absorption LB in Enfield since 2012 has been overall negative in the Borough (-600sqm), which may in part reflect the introduction of Permitted Development Rights (PDR) in May 2013.

Figure 6-10 Net Absorption of Office Floorspace in Enfield and the FEMA (2007 to 2016)


6.4 Summary

6.4.1 A summary of the information presented in this chapter on LB Enfield’s industrial market is as follows:

- LB Enfield has the largest industrial market within the FEMA, representing almost a third of all stock.
- Industrial units in LB Enfield are large, implying a significant presence of storage/distribution uses, as also observed during the site survey.
Rental values in LB Enfield are slightly higher than average for the FEMA.

The highest rates of both vacancy and availability across the FEMA are observed in LB Enfield.

Vacancy increases with the size of units, suggesting that there may be limited availability of smaller units to accommodate SMEs.

Positive net absorption across LB Enfield and the FEMA suggests positive trends in the demand for industrial occupation.

Manufacturing (B1c/B2) floorspace has overall seen a net increase in the period since 2000, although no overall pattern is observed. Growth in floorspace is concentrated in the Enfield Highway and Enfield Lock wards, offsetting a contraction observed elsewhere.

However, information on permissions that have been started but not yet completed indicates that around 283,000sqm of manufacturing floorspace could soon be lost to other uses.

6.4.2 A summary of the information presented in this chapter on LB Enfield's office market is as follows:

- LB Enfield has a relatively small office market, dominated by smaller units.
- Both vacancy and availability rates are low relative to the wider FEMA, implying a tighter market environment.
- Lower levels of vacancy for larger units suggests that the limited availability of grow-on space may constrain the growth of businesses as they move up the accommodation ladder.
- Average unit sizes and rental values are broadly in line with the FEMA averages.
- Net absorption is observed to be positive across both LB Enfield and the FEMA, suggesting positive future demand for office space.
7. Demand Forecast

7.1 Introduction and Approach

7.1.1 This section forecasts the demand for office floorspace and manufacturing/warehousing land. The forecast is largely driven by quantitative analysis, though it is informed by qualitative findings from other sections of this review. The section concludes with a value of the net additional demand required to accommodate growth in businesses associated with B-use class premises and land over the Local Plan period.

7.1.2 Forecasting methodologies vary. One approach to forecasting employment floorspace or land requirements is to use projections based on macro-economic growth forecasts, which model the projected structural changes in the economy at large. As such they capture drivers and processes such as economic agglomeration, specialisation and globalisation. Macro-economic forecasts provide a top down logic to forecasting based on nation or regional economic growth, which is apportioned at lower geographies. Typically these forecasts place less emphasis on local economic circumstances.

7.1.3 An alternative approach is to a macro-economic driven forecast is to project forward the historic rate of change. This approach captures local circumstances and characteristics of place. However, the long term future growth prospects of a place may differ from past growth as the structure and focus of the economy changes over time or as a consequence of large scale projects such as infrastructure investment.

7.1.4 Our approach looks at both the macro-economic forecast and historic trend based forecast and considers their suitability for forecasting future land and floorspace needs. Our approach involves the following steps:

- A review historic trends in floorspace and employment and the relationship between these two variables, drawn from ONS data
- A review projections in office and manufacturing/warehousing employment using GLA Economics data and consider how these compare against historic trends; and
- Based on historic trends and future projections, or a combination of the two, forecast employment floorspace and land requirements for office, manufacturing and warehousing space.

7.1.5 At each step, the analysis considers trends for office and industry across Enfield and the wider FEMA so that local and wider economic and property markets can be compared. As per the PPG guidance our demand forecast presents an unconstrained assessment of future need (though implicit within past trends data are constraining factors such as the nature of the commercial property market, market failure, etc). The assessment is undertaken independently of any assessment of whether there is a sufficient supply of land available to meet future need, or constraints from other policy requirements such as the need to provide new housing. Similarly, the results do not constrain demand by the potential viability or deliverability of specific existing/potential employment sites.

56 Autumn 2015
7.2 Historic Trends and Future Projections

Trends in Historic Floorspace

7.2.1 The Valuation Office Agency (VOA) records the amount of floorspace in an area for tax purposes (the assessment of business rates), by building type. The VOA provides information on the stock of commercial floorspace by office (B1a/b) and industrial (B1c/B2/B8) use classes. While this data is available up to 2016, we will consider the period 2001 to 2015 to align with availability of employment data provided by the ONS.

7.2.2 Table 7-1 presents the change in floorspace across Enfield and the FEMA, considering the change across this period in terms of the difference, compound annual growth rate (CAGR)\(^{57}\) and an average annual net change trend line.

<table>
<thead>
<tr>
<th>Use Class</th>
<th>2001</th>
<th>2015</th>
<th>Difference</th>
<th>Change (%)</th>
<th>CAGR (%)</th>
<th>Average Net Change (pa)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>175,000</td>
<td>166,000</td>
<td>-9,000</td>
<td>-5.1%</td>
<td>-0.4%</td>
<td>-607</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>1,388,000</td>
<td>1,212,000</td>
<td>-176,000</td>
<td>-12.7%</td>
<td>-1.0%</td>
<td>-11,711</td>
</tr>
<tr>
<td>FEMA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>1,283,000</td>
<td>1,372,000</td>
<td>89,000</td>
<td>6.9%</td>
<td>0.5%</td>
<td>4,204</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>5,397,000</td>
<td>4,900,000</td>
<td>-497,000</td>
<td>-9.2%</td>
<td>-0.7%</td>
<td>-35,032</td>
</tr>
</tbody>
</table>

Source: VOA, 2016.

7.2.3 Between 2001 and 2015 the stock of office floorspace in Enfield contracted by approximately 9,000sqm (5.1%). This is equivalent to a CAGR of -0.4% per annum. This direction of change is not reflected across the FEMA, which saw an increase of 89,000sqm (6.9%) across the same period. Over this period, Enfield and the FEMA lost on average 607sqm of floorspace annually, while the FEMA gained on average 4,204sqm pa. Should this trend continue over the plan period up to 2036, Enfield would lose 12,143sqm of floorspace, equivalent to 7.3% of 2015 stock, while the FEMA would gain over 6.1% of stock (84,071sqm).

7.2.4 Figure 7-1 presents the trend in office floorspace across the FEMA over the period 2001 to 2015.

\(^{57}\) A CAGR estimates the growth of a variable over time assuming a constant rate of return. It provides a useful tool for comparing changes across different variables and data sets as the magnitude of growth is considered relative to the initial level, and thus is not contingent on the absolute estimate of stock at any given point.
7.2.5 The net growth in office floorspace across the FEMA has been largely concentrated at Welwyn Hatfield, which saw an increase of 73,000sqm over this period, equivalent to 82% of the total net increase across the FEMA. For the remaining seven local authorities, the overall pattern is relatively stable. Alongside Enfield, Redbridge (-20,000sqm) and Haringey (-18,000sqm) also saw a net loss of floorspace stock across this period. In Enfield, there has been no net change in office floorspace since 2006.

7.2.6 As set out in Figure 7-2 Industrial floorspace also contracted over this period (by approximately 176,000m, equivalent to 12.7% of current stock). The rate of contraction of industrial floorspace is broadly in line with the wider FEMA which lost 9.2% (497,000sqm) of floorspace over this period, although Enfield contributes over a third (35.4%) of total net loss. The average net change in industrial floorspace equates to -11,711sqm and -35,052sqm across Enfield and the FEMA respectively. Should this trend continue over the plan period we would anticipate total stock to contract by 234,214sqm (19.3%) in Enfield and -700,643sqm (14.3%) across the FEMA.

Source: VOA, 2016.
7.2.7 Figure 7-2 confirms that over the period covered industrial floorspace has slowly contracted across Enfield. Performance across the rest of the FEMA suggests a similar trend, with a net increase in floorspace observed in only two local authorities, Broxbourne (196,000sqm) and Epping Forest (95,000sqm).

**Trends in Historic Employment**

7.2.8 Historic employment data is drawn from the Annual Business Inquiry (ABI) between 1998 and 2008 and the Business Register and Employment Survey (BRES) from 2008 to 2015. Both datasets are compiled by the Office for National Statistics (ONS). Employment is expressed at a Standard Industrial Classification (SIC) level, not by use class.

7.2.9 Our analysis converts Standard Industrial Classification (SIC) level data into B use classes B1a/b, B1c/B2 and B8. To estimate employment by these use classes we identify the SIC levels which typically operate from offices (B1a/b), manufacturing premises (B1c/B2) and warehousing premises (B8). The linking of SIC levels to use class draws upon extensive prior work on employment land studies that AECOM have undertaken.

7.2.10 The next table summarises the historic growth in employees\(^59\) in each use class across Enfield and the FEMA.

---

\(^{59}\) Note that we report on employees (in paid work, supported by a business) not employment (the number of people in work). Employment consists of employees, self-employed people, unpaid family workers and people on government supported training and employment programmes. For this analysis it is more suitable to consider trend in employee numbers as an expression of economic growth.
Table 7-2 Employees by B Use Class 2001 to 2015

<table>
<thead>
<tr>
<th>Use Class</th>
<th>2001</th>
<th>2015</th>
<th>Difference</th>
<th>Change (%)</th>
<th>CAGR (%)</th>
<th>Average Net Change (pa)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>18,000</td>
<td>16,100</td>
<td>-1,900</td>
<td>-10.4%</td>
<td>-0.8%</td>
<td>-101</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>14,000</td>
<td>9,700</td>
<td>-4,300</td>
<td>-31.0%</td>
<td>-2.6%</td>
<td>-295</td>
</tr>
<tr>
<td>Warehousing (B8)</td>
<td>10,100</td>
<td>10,300</td>
<td>200</td>
<td>2.2%</td>
<td>0.2%</td>
<td>6</td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>97,300</td>
<td>120,300</td>
<td>23,000</td>
<td>23.7%</td>
<td>1.5%</td>
<td>1,373</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>61,600</td>
<td>47,600</td>
<td>-14,000</td>
<td>-22.6%</td>
<td>-1.8%</td>
<td>-1,151</td>
</tr>
<tr>
<td>Warehousing (B8)</td>
<td>40,000</td>
<td>44,600</td>
<td>4,600</td>
<td>11.7%</td>
<td>0.8%</td>
<td>248</td>
</tr>
</tbody>
</table>

Source: ONS, (2016); AECOM calculations.

7.2.11 The above table shows that Enfield has seen a net loss of approximately 1,900 office employees across this period, equivalent to a 10.4% loss relative to 2001 and at a CAGR of -0.8%. By contrast, office employment across the FEMA has grown by 23,000 (23.7%) over this period. This equates to a CAGR of 1.5% across the two time points (2001 and 2015).

7.2.12 Based on a linear regression of each data series, we estimate that Enfield experiences an overall average net loss of employees in Enfield of 101, while the number of employees grows across the FEMA by 1,373 per annum. Should this trend continue over the plan period up to 2036, Enfield would lose an additional 2,018 office jobs (equivalent to 12.5% of current jobs) while the overall FEMA would gain 27,462 office jobs (a 22.8% increase on current levels).

7.2.13 Figure 7-3 illustrates the changing number of office employees in Enfield’s office market compared to other local authorities in the FEMA.
7.2.14 The figure above shows that across the FEMA there is generally little volatility in office employment. Across the FEMA, 95% of the overall net growth across this period (22,000 jobs) has occurred from 2009 onwards. Enfield has the third largest number of office employees across the FEMA, with only Barnet (31,000) and Redbridge (17,800) supporting more office workers.

7.2.15 Figure 7-4 presents the trend in manufacturing employees over the period 2001 to 2015.

7.2.16 The figure shows that all local authorities in the FEMA experienced a net loss of manufacturing jobs over the period. The FEMA overall lost 13,900 manufacturing jobs, of which Enfield represents the largest share (4,300, or 31.1%). However, from 2011 onwards, the number of manufacturing jobs across the FEMA rose (by 4,800 jobs), of which Enfield contributed 1,800 jobs (37.3%). This upward trend is picked up in the forecast data in
7.2.17 **Figure 7-5** presents the trend in warehousing employees over the period 2001 to 2015.

**Figure 7-5 Warehousing Employees (2001 to 2015)**

![Figure 7-5 Warehousing Employees (2001 to 2015)](image)

*Source: ONS, (2016); AECOM calculations.*

7.2.18 The figure above shows a stronger performance in warehousing employment across the FEMA. In Enfield, warehousing employment grew by approximately 200 (2.2%) over this period, while across the FEMA an additional 4,700 jobs (11.7%) were generated over this period. The strongest net performance across the FEMA is observed at Welwyn Hatfield, which contributed 4,300 net additional jobs (92.6% of all net additional jobs) across this period.

**Relationship of Historic Trends in Employees and Floorspace Change**

7.2.19 **Table 7-3** compares the historic data on floorspace and employees by use class.

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Employees CAGR (%)</th>
<th>Floorspace CAGR (%)</th>
<th>Ratio (A : B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>-0.8%</td>
<td>-0.4%</td>
<td>1 : 0.5</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>-1.3%</td>
<td>-1.0%</td>
<td>1 : 0.8</td>
</tr>
<tr>
<td>FEMA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>1.5%</td>
<td>0.5%</td>
<td>1 : 0.3</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>-0.7%</td>
<td>-0.7%</td>
<td>1 : 1.0</td>
</tr>
</tbody>
</table>

*Source: ONS, (2016); VOA, (2016); AECOM calculations.*

7.2.20 The ratios presented in Error! Reference source not found.**Table 7-3** provide an indication of, on average across the period 2001 and 2015, the relationship between the change in floorspace and the change in employment. A ratio less than 1.0 indicates that employment densities (the average floorspace per worker) have fallen, while a ratio of above 1.0 indicates the opposite.

7.2.21 The summary table shows that across the FEMA the rate at which the number of office
employees grows is three times larger than the equivalent growth in floorspace. This relationship may be a result of increasing employment densities as a consequence of more efficient use of space such as flexible hours and working practices, increasing the ratio of employees to space. While both measures are contracting across Enfield a similar pattern is observed with the rate of contraction of employees double that of floorspace.

7.2.22 For industrial uses, Table 7-3 indicates that the relationship between employees and floorspace is more closely aligned. A 1% increase in the number of employees is associated with a 0.8% increase in floorspace within Enfield, while across the FEMA the floorspace impact proportionately equal. Given a decline in both measures, this ratio may be lower in Enfield due to the relative increase in warehousing which have lower employment densities compared with other B-use class businesses.

7.3 Employment Forecasts

7.3.1 Workplace employment projections are one of the inputs used to forecast demand for employment land across the plan period. Two sources of employment forecasts are included in this analysis.

7.3.2 Employment forecasts for local authorities outside of London in Enfield’s FEMA are taken from the East of England Forecasting Model (EEFM), which is produced by Cambridge Econometrics in autumn 2016. For local authorities in Enfield’s FEMA within London, forecasts are based on GLA Economics projections, published in autumn 2015. These projections provide separate indications of the growth in employment by borough and by sector across the next London plan period. In order to identify the share of B use class employment within each borough, we triangulate these two projections with a third series that considers the historic sectoral change across boroughs. The employment forecast is therefore driven to a large extent by historic trends.

7.3.3 While the two employment forecasting sources apply differing methods to projecting future workplace employment, from a review of their approach, and based on our professional experience, we believe that they are robust and suitable for projecting change over the longer term in Enfield to inform strategic planning.60

7.3.4 Table 7-4 presents the projected employment growth by use class across Enfield and the FEMA over the plan period.

<table>
<thead>
<tr>
<th>Use Class</th>
<th>2016</th>
<th>2036</th>
<th>Difference</th>
<th>Change (%)</th>
<th>CAGR (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield Office (B1a/b)</td>
<td>17,300</td>
<td>22,200</td>
<td>4,900</td>
<td>28.2%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>17,500</td>
<td>20,900</td>
<td>3,400</td>
<td>19.2%</td>
<td>0.9%</td>
</tr>
<tr>
<td>FEMA Office (B1a/b)</td>
<td>131,900</td>
<td>180,700</td>
<td>48,800</td>
<td>37.0%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Industrial</td>
<td>88,600</td>
<td>103,000</td>
<td>14,400</td>
<td>16.3%</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

60 Given the complexity of market forces it is less suitable to use quantitative forecasting for periods in excess of 20 years.
7.3.5 Table 7-4 indicates that, across both geographies, the net employment change is anticipated to be positive for both use classes. For office uses, employment is anticipated to be stronger across the FEMA (1.6% CAGR) than Enfield (1.3% CAGR), while for industrial uses the relationship is reversed, with Enfield (0.9% CAGR) due to grow at a faster rate than the FEMA (0.8% CAGR). This would mean a reversal to the past trends in industrial employment change.

7.4 Alternative Methods to Forecasting Demand

7.4.1 The PPG\(^{61}\) outlines the need for future trends to consider a range of approaches to forecasting including:

- Demographically derived assessments of future employment needs (labour supply techniques); and
- Analyses based on the past take-up of employment land and/or future property market requirements.

7.4.2 In addition to this an employment space to jobs calculation can be made based on the projected growth in employment set out under Table 6-4.

7.4.3 We outline below the scale of growth resulting from these alternatives and the suitability of these approaches to estimating future B use class floorspace requirements.

Labour Supply Approach

7.4.4 This approach assumes that future growth in the resident population will influence the demand for jobs and consequently employment space. It assumes an inherent equilibrium in the labour market where employment opportunities are created to satisfy the employment needs of the local population. The ONS Sub-National Population Projections (2016) provide an indication of the future demographic profile across local authorities in England.

7.4.5 Table 7-5 presents the labour supply-driven growth rates for Enfield and the FEMA across the plan period. It suggests a 1.1% and 1% CAGR increase in employment across the Borough and FEMA respectively.

<table>
<thead>
<tr>
<th>Use Class</th>
<th>2016</th>
<th>2036</th>
<th>Additional Population</th>
<th>CAGR (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>334,300</td>
<td>412,100</td>
<td>77,800</td>
<td>1.1%</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>334,300</td>
<td>412,100</td>
<td>77,800</td>
<td>1.1%</td>
</tr>
<tr>
<td>FEMA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>1,926,000</td>
<td>2,357,300</td>
<td>431,300</td>
<td>1.0%</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>1,926,000</td>
<td>2,357,300</td>
<td>431,300</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

\(^{61}\) Paragraph: 033 Reference ID: 2a-033-20140306.
7.4.6 However, while providing a broad estimate of employment need across all sectors in the economy, the labour supply approach does not make any distinction between which sectors in the economy are expected to grow and hence does not account for structural economic changes. A simple review of population growth does not capture the potential for residents to travel elsewhere to work (whether in or out of the Borough). Analysis based on the Census 2011 indicates that only 33.7% of Enfield’s employed residents are retained in the Borough as employees (see Section 3). Therefore, at a local level, it is unlikely that a proportional relationship will exist between new resident population and workforce jobs.

7.4.7 Historic data outlined above identified a contraction in both office and industrial employment over recent years. Assuming that employment densities are static over the plan period, the labour supply approach implies a steady growth in all sectors across the economy. This approach does not therefore provide appropriate estimate of future employment, and hence floorspace demand, across the plan period.

Property Trends Approach

7.4.8 This approach estimates a continuation of historic trends in the take-up of commercial floorspace. Over the long term take up can be considered tantamount to stock less vacancy. Table presents the growth rate implied by historic occupancy from 2001 to 2015 across both the Borough and the FEMA, which shows that growth in office floorspace ranges from -0.4% to 0.5% CAGR for the Borough and the FEMA respectively, and for industry floorspace between -1.0% and -0.7% CAGR for the Borough and the FEMA respectively.

7.4.9 The suitability of this approach is contingent on the extent to which we may reasonably expect past trends to continue. This approach is also sensitive to the effects of short term fluctuations in data, which do not provide an accurate representation of long term growth trends. This therefore may not provide the most accurate indication of future expectations. For instance, based on past trends in occupancy rates in Enfield alone, this approach assumes that the office market would contract by approximately -7.3% and the industrial market would contract by -17.6% over the period 2016 to 2036. This magnitude of change is not supported by the body of evidence gathered through analysing future economic data, which suggests a more positive outlook for both the office and industrial markets. As a result, historic take-up rates alone are not considered a suitable method of estimating future floorspace demand.

Floorspace to Employment Ratio

7.4.10 A another method to estimate the potential demand for office or industrial space is to apply the average ratio of employment floorspace per job by use class to the projected growth in employment by use class.

7.4.11 The following table sets out this calculation drawing on Table 7-4. Under this estimate the floorspace is anticipated to grow across all use classes: 73,500sqm for office; 104,000sqm for manufacturing and 53,900sqm for warehousing. This floorspace translates as a land requirement of 3.7ha of office space (assuming an average plot ratio of 2.0 - four storeys over 50% of the site) and 36.8ha of industrial space (assuming a plot ratio of 40% to 50% of the site). This growth rate is the equivalent to 1.8% CAGR for office...
space, 0.8% CAGR for manufacturing and 0.4% CAGR for warehousing.

Table 7-5 Net Employment Floorspace / Land Requirement 2016 to 2036 based on Employment to Floorspace Ratios (Enfield)

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Projected Additional Jobs</th>
<th>Assumed Average Floorspace to Job Ratio (GEA sqm / job)</th>
<th>Estimated Net Additional Floorspace</th>
<th>Assumed Plot Ratio</th>
<th>Estimated Net Land</th>
<th>CAGR Equivalent (Floorspace)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>4,900</td>
<td>15</td>
<td>73,500</td>
<td>2.0</td>
<td>3.7 ha</td>
<td>1.8%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2,600</td>
<td>40</td>
<td>104,000</td>
<td>0.4</td>
<td>26.0 ha</td>
<td>0.8%</td>
</tr>
<tr>
<td>(B1c/B2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Warehousing</td>
<td>700</td>
<td>77</td>
<td>53,900</td>
<td>0.5</td>
<td>10.8 ha</td>
<td>0.4%</td>
</tr>
<tr>
<td>(B8)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: EEFM, (2016); ONS, (2016); GLA Economics (2015); ODPM Employment Land Review Guidance Notes (Dec 2004); AECOM assumptions and calculations.

7.4.12 The drawback of this approach is that average floorspace to job densities are applied, and the changing nature of how businesses use space is not captured. For example, the rise of flexible working practices and the numerical flexibility which some businesses apply to their operations may not be adequately captured.

7.5 Summary of Forecast Growth Rates

7.5.1 Table 7-6 presents the future floorspace growth rates should the historic relationship between floorspace and employment by applied to future employment projections.

Table 7-6 Calculated Future Floorspace Growth Rates

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Future Employment CAGR (%)</th>
<th>Historic Ratio</th>
<th>Future Floorspace CAGR (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LB Enfield</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>1.3%</td>
<td>0.5</td>
<td>0.6%</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>0.9%</td>
<td>0.8</td>
<td>0.7%</td>
</tr>
<tr>
<td>FEMA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>1.6%</td>
<td>0.3</td>
<td>0.5%</td>
</tr>
<tr>
<td>Industrial (B1c/B2/B8)</td>
<td>0.8%</td>
<td>1.0</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

Source: VOA, (2016); EEFM, (2016); ONS, (2016); GLA Economics (2015); AECOM calculations.

7.5.2 Table 7-6 indicates that on this basis positive growth is anticipated across both use classes. The FEMA is considered a more suitable level of geography to forecast at. On that basis the calculation indicates that Enfield’s office stock will grow at an average rate of 0.5% pa and industrial stock will grow by 0.8% pa. These rates suggest Enfield has good potential to grow as an office location and will continue to be a focus of industrial activity, with potential to enhance its industrial employment base.

7.5.3 These estimated growth rates are used to calculate office floorspace and industrial land demand in the next section.
7.6  Factors Driving a Step Change in Demand

7.6.1  Our demand forecast assumes that the relationship between floorspace provision and employment change, as seen in the past, continues, and the growth in employment aligns with that projected by GLA Economics.

7.6.2  The GLA Economics’ employment forecast is based on past sector trends and therefore does not capture any significant intervention in the economy or step change in drivers which impact on the economy. Factors which could promote a change in demand for businesses to locate in Enfield include:

- **Large scale transport improvements**
  - Investment in the West Anglia Main Line (WAML): Public transport access will be greatly improved with an approved £122m of rail investment to provide 4 trains per hour (tph) service at Angel Road from 2018 alongside improvements to the station. There is significant planned investment in track and stations along the Main Line to achieve a regular 4 tph with the rail industry developing a phased programme of enhancements. Initially, enhancements will be made to introduce a 4 tph service between Stratford, Tottenham Hale and Angel Road (the STAR scheme). This will strengthen the link between the ULV and Stratford, the Lower Lee Valley and the Isle of Dogs.
  - Crossrail 2: The proposed route of Crossrail 2, which is in its early stages of assessment and planning, follows the existing WAML corridor. Existing plans include new services at four stations in Enfield: Enfield Lock, Brimsdown, Ponders End and Angel Road. This investment includes the ‘four tracking’ of the WAML north of Angel Road, further increasing rail capacity and reducing journey times along this route. Crossrail 2 could have a significant impact on the accessibility, acting as a catalyst for regeneration along the existing rail corridor. Given the close proximity of these stations to a large quantity of Enfield’s industrial land stock, this investment could have implications for the changing use of employment land along this corridor.

- **Regeneration and place making**
  - The aspiration to see regeneration at Meridian Water and more widely across the ULV is set out in planning policy and reflected in the Council’s economic development objectives. The London Plan (2016) and Upper Lee Valley Opportunity Area Planning Framework (OAPF) (2013) support substantial development of new dwellings and jobs. The aim is to deliver 20,100 new dwellings and 15,000 new jobs in the ULV by 2031. The OAPF identifies that Meridian Water is one of the key schemes that will help deliver a substantial proportion of this growth. Additionally, Meridian Water is identified as one of the developments which will play a key role in delivering the growth aspirations of 117,000 new dwellings and 170,000 new jobs within the LSCC by 2034. The Council’s aspiration is to deliver 10,000 new dwellings and 6,700 net additional permanent jobs on the site over the next 20 years, beginning in 2017.

- **Commercial property market drivers**
  - A relatively low cost location for offices: As the central London office market has strengthened over time, with occupier confidence rising and office supply level

---

GLA, (2016); London Plan.
GLA, (2013); Upper Lee Valley Opportunity Area Planning Framework.
LSCCC, (2014); An Agenda for Jobs, Growth and Improved Liveability.
The jobs figure excludes those provided through the public sector. See [http://meridianwater.co.uk/employment/](http://meridianwater.co.uk/employment/)
decreasing, rental values commanded have increased. Rents in King’s Cross for example have increased from £40 per sqft (£430 per sqm) to £70 per sqft (£753 per sqm) in space of five to seven years prior to May 2015. Rents at Silicon Roundabout are approaching levels similar to core rents in the City of London.\textsuperscript{66} Research by Savills identifies affordable accommodation as a key driver in the movement of office based businesses from more central London locations and observe that ‘tenants are increasingly prepared to move from traditional locations in search of more affordable locations’.\textsuperscript{67} The potential to attract large occupiers to cost competitive locations which are well served by public transport networks is evidenced by the recent announcement of HM Revenue and Customs taking 184,000 sqft (17,000sqm) office block on a 25-year lease at One Ruskin Square next to East Croydon station, which will see more than 2,500 civil servants set to be employed in the nine-storey building.\textsuperscript{68}

- Contracting supply of industrial land: Occupiers of industrial land provide goods and services to support the effective functioning of the city as well as exports to national and world markets. Accordingly industrial land has been protected and within Enfield there are 11 SILs and 14 LSIS’ providing a relatively large of land designated for industrial activities and associated uses. Industrial land requires protecting given the low value of industrial land relative to other uses, primarily residential but also office or retail and the high demand for these alternative uses.\textsuperscript{69} This dynamic creates significant market pressure for the release of industrial land to alternative higher value uses. This pressure has been particularly strong in inner London boroughs and has led to some businesses being relocated from sites to outer borough locations.

- AECOM’s recent update for the GLA on the supply of industrial land identified that 528ha of industrial land was lost between 2010 and 2015 - a reduction of 7% in stock and a loss well in excess of that planned and set out in the GLA’s Land for Industry and Transport SPG (2012)\textsuperscript{70}. Furthermore, this rate of loss is estimated to be faster than seen historically. As the release of industrial land has outpaced the contraction in industrial employment, land and rental values have increased. Coupled with this, the increase in demand for land by competing uses and consequent increase in land values has also seen non-designated industrial land lost to higher value uses such as residential. Evidence suggests that there has been an outward movement of industrial businesses seeking lower cost locations in outer London boroughs. This demand is likely to strengthen if the loss of industrial land continues above rates advised.

- There is evidence from the market that the lack of land / premises of suitable of suitable size and locations could constrain growth of certain sectors. Segro, the UK’s largest industrial property developer, has highlighted concern over the depletion of warehouse sites in London arguing that this is leading to a shortage of land for fast growing e-commerce hubs, online retailers, data centres and caterers. To help address this issue Segro has stated interest in a planning policy to enable multi-storey warehousing.\textsuperscript{71}

\textsuperscript{66} ARUP commissioned by LBE, (2015); Meridian Water Enfield: Business Park Development at Meridian Water.
\textsuperscript{67} Savills, (May 2015); Meridian Water Development: Evidence report to support the development of Meridian Water (p.12)
\textsuperscript{68} http://developcroydon.com/ (accessed 26th August 2016)
\textsuperscript{69} The London Plan (2016) states that the capital could grow by 91,000 – 106,000 pa in the decade to 2021, and over the term of the Plan to 2036 by 64,000 - 88,000 pa.
\textsuperscript{70} The SPG suggested that between 2011 and 2031 only 733ha of industrial land should be released across London.
\textsuperscript{71} Financial Times ( 2nd February 2017); Alarm Raised on Dearth of London Warehouse Space
Technological application and new market opportunities

- As with any projection, there is uncertainty over how the economy different the future could look to the past, particularly with the rapid advancement of technology application in business which is changing the way in which business is conducted, opening up new markets and revitalising old ones. Through efficiencies, technology can also drive contractions land and premises requirements and alter the geography of locational need. The Government’s recent Green Paper, Building Our Industry Strategy highlights this issue: ‘...many of the most important companies in the world today did not even exist 25 years ago. Unlike in the past, industrial strategy must be about creating the right conditions for new and growing enterprise to thrive, not protecting the position of incumbents.’ (HM Government, Jan 2017, Green Paper; Building Our Industrial Strategy).

7.6.3 Enfield must therefore be responsive and flexible in its approach to supporting industrial uses and monitor regularly how the economy changes, how business needs change and signals from the commercial market and developer community.

7.7 Summary

7.7.1 This section has analysed past and projected data on employment and floorspace to inform a view on the indicative direction and strength of demand for office and industrial uses could be over the longer term to 2036. The projected rate of growth is unconstrained in that it is not limited by supply (availability and suitability of sites and premises), though implicit within the trend analysis data are constraints on demand (access to finance and suitably skilled labour, appropriately accommodation, rental and leasing arrangements etc.).

7.7.2 Table 7.6 presents the potential future floorspace growth rates assuming that the historic relationship between floorspace provision and employment change holds true for future employment projections. There are however a number of driving factors which could bring about a step change in demand for businesses space in Enfield. Examples of factors driving a step change include: strategic transport improvements; large scale regeneration; and an accelerated loss of industrial land in North / East / West London, driven by demand and financial gain from redevelopment for other uses, primarily residential. As such the calculated projected rate of growth should be used as an indicator of the potential direction and strength of requirement to inform policy setting, but not as a definitive requirement, which must be met.
8. **Comparison between Supply and Demand**

8.1 **Introduction**

8.1.1 This section quantifies the demand for industrial land and office floorspace over the period 2016-2036 and compares this projected future demand with existing supply conditions across the Borough, taking into account vacant floorspace and land which is vacant and developable or has derelict buildings.

8.2 **Calculating the Future Demand**

8.2.1 This section completes the numerical exercise of calculating demand for office and industrial uses.

8.2.2 It is worth re-emphasising that the demand projection is based on data representative of economic growth across the Borough and FEMA level. As the FEMA is an approximation of the geography of property markets, our projection is also an approximation of the likely scale of change which could occur in the office and industrial markets. The forecast is unconstrained by supply or constraints from policy. The calculated projected demand should be used as an indicator of the potential direction and strength of requirement to inform policy setting, but not as a definitive requirement, which must be met.

**Industrial and Warehousing Land**

8.2.3 Industrial land comprise:

- **Core uses** such as general industry, light industry, warehouses, open storage and self-storage

- **Wider industrial uses** comprise wholesale markets, waste management and recycling facilities, utilities, land for rail, land for buses, airport related land and other industrial land. Such uses are industrial in nature and support the functioning of London for instance by way of providing space for infrastructure; and

- **Vacant industrial land** comprises sites which are vacant and cleared, land with derelict buildings and / or land with vacant buildings capable of occupation.

8.2.4 This calculation of demand is made for core industrial uses based upon the rate of change set out in *Table 7-6*, taking into account the requirement for other uses of industrial land and the provision of vacant developable land.

**Wider Industrial Uses**

8.2.5 Waste Management and Recycling: Based on the borough waste apportionment outputs in the London Plan and making allowance for re-use of surplus waste transfer capacity the SPG on Land for Industry and Transport estimates the likely future land requirement for new waste facilities in each borough 2011-2031\(^2\). Land requirements depend on a number of factors including, the number, type, scale and location of waste treatment and recycling facilities selected to manage the apportionment in collaboration with neighbouring boroughs where appropriate.

8.2.6 In LB Enfield’s case, sites and their contribution towards meeting waste management

---

\(^2\) Land for Transport and Industry SPG Annex 2, (2012); GLA
requirements going forward were identified in its Site Specific Allocations Document (2016), which translated into a requirement for 3.9 ha of land based on a need to manage 80,000 tonnes per hectare. The requirement is met by these existing sites and as such there is no need to plan for the provision of additional land to meet London waste apportionment targets as part of the net demand forecast in this study.

8.2.7 Utilities and Land for Public Transport: The draft GLA London Industrial Land Baseline (2015) measured 122.4ha of land for these uses, the largest single use being land for utilities (81.6ha) and land for waste management and recycling (32.2ha). No additional demand for land for these uses has been identified through planning policy.

Vacant Floorspace: Land Equivalent

8.2.8 The calculation of net additional demand is expressed as land and as such vacant floorspace, which is netted off the occupied stock figure and used as a forecasting base, needs to be calculated. CoStar measures vacant Industrial floorspace to be 4.7%, which is applied to total land stock of land supporting core industrial uses.

Net Additional Demand for Industrial and Warehousing Land

8.2.9 Error! Not a valid bookmark self-reference. presents the net requirement for industrial land across the plan period.

Table 8-1 Net Additional Requirement for Industrial Land up to 2036

<table>
<thead>
<tr>
<th>Demand for Industrial Land</th>
<th>Industrial Land (Ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Total stock of core industrial land (2016) plus vacant land [B+C]</td>
<td>329.1</td>
</tr>
<tr>
<td>B. Current vacant industrial land equivalent (4.7%)</td>
<td>15.5</td>
</tr>
<tr>
<td>....of which is actively marketed vacant land</td>
<td>2.9</td>
</tr>
<tr>
<td>C. Supply of occupied core industrial land (2016) [A-B]</td>
<td>313.6</td>
</tr>
<tr>
<td>D. Land demand to 2036</td>
<td>46.1</td>
</tr>
<tr>
<td>E. Optimum frictional vacancy at 2036 [5% of C+D]</td>
<td>18.0</td>
</tr>
<tr>
<td>F. Additional Demand for Utilities, Transport and Waste Management 2016-2036</td>
<td>1.8</td>
</tr>
<tr>
<td>G. Surplus/deficit of vacant land in 2036 [E-B]</td>
<td>2.5</td>
</tr>
<tr>
<td>H. Gross requirement for industrial land 2016-2036 [A+D+F+G]</td>
<td>379.5</td>
</tr>
<tr>
<td>I. Net requirement for industrial land 2016-2036 [H-A]</td>
<td>50.4</td>
</tr>
</tbody>
</table>

Source: AECOM.

Note:
Point A: Industrial land stock derived from the London Industrial Land Supply and Economy Study 2016 (GLA) and the site survey 2016. Note that this only includes core industrial uses not wider uses.
Point B: 4.7% vacancy rate as estimated by CoStar Data (November 2016). Total vacant industrial land was measured at 2.9ha.
Point C: Core uses include light and general industry, warehouses and storage. This figure does not include wider
uses such as wholesale markets, waste management and recycling, utilities, land for transport, nor does it include vacant land or buildings with vacant floorspace, as this land and space is not occupied.

Point D: Derived from the FEMA CAGR % pa in Table 7-6
Point I: Assumes that the marketed vacant floorspace and land could accommodate demand.

Net Additional Demand for Office Floorspace

8.2.10 **Table 8-2** presents the net requirement for office floorspace across the plan period. The central demand forecast is based upon the rate of change set out in **Table 7-6**.

**Table 8-2 Net Additional Requirement for Office Floorspace up to 2036**

<table>
<thead>
<tr>
<th>Demand for Office Floorspace</th>
<th>Office Floorspace (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Supply of occupied office floorspace (2016)</td>
<td>163,200</td>
</tr>
<tr>
<td>B. Current vacant office floorspace (1.1%)</td>
<td>1,800</td>
</tr>
<tr>
<td>C. Total stock of office floorspace (2016) [A+B]</td>
<td>165,000</td>
</tr>
<tr>
<td>D. Floorspace demand to 2036</td>
<td>17,000</td>
</tr>
<tr>
<td>E. Optimum frictional vacancy at 2036 [5% of A+D]</td>
<td>9,000</td>
</tr>
<tr>
<td>F. Surplus/deficit of vacant floorspace in 2036 [E-B]</td>
<td>7,200</td>
</tr>
<tr>
<td>G. Gross requirement for office floorspace 2016-2036 [C+D+F]</td>
<td>189,200</td>
</tr>
<tr>
<td>H. Net requirement for office floorspace 2016-2036 [G-C]</td>
<td>24,200</td>
</tr>
</tbody>
</table>

Source: AECOM.

Note:
Point A: VOA data (December 2016).
Point B: % vacancy rate as estimated by CoStar Data (November 2016).
Point D: Derived from the FEMA CAGR % pa in Table 7-6

8.2.11 The PPG advises that where possible employment floorspace should be converted to employment land using plot ratios. However, due to the wide range of densities of offices it is less meaningful to translate the floorspace demand figures into land. The demand for office space is therefore presented in terms of floorspace (sqm).

8.3 Development Pipeline and Permitted Development Rights

Development Pipeline

8.3.1 Planning applications with consent yet to be implemented or under construction could meet the net additional demand arising over the Local Plan period. However, there is a possibility that some developments may not come forward at all, or be developed in different quantities by use class than has been consented, for example if amendments to the planning applications are made.

8.3.2 **Figure 8-1** presents the additional floorspace by use class in LB Enfield since 2000.
8.3.3 Source: LB Enfield (2016).

8.3.4 The figure shows that overall there has been a net loss of office floorspace across LB Enfield over this period, equal to 13,700sqm. Overall stock grew in five of the 17 years considered, most notably in 2002 and 2010 (by 8,500 and 9,100sqm respectively).

8.3.5 In terms of B1c/B2 floorspace, while the overall trend is positive (with stock increasing by 33,100sqm over this period), the overall pattern is generally mixed. Growth is most notable in 2005 (27,500sqm), 2009 (19,600sqm) and 2010 (25,000sqm), where the growth in floorspace was equal to 83.2%, 59.1% and 75.6% of overall change respectively. The greatest loss of B1c/B2 floorspace was observed in 2015, where stock fell by 30,100sqm, leading to a loss of 47.7% of the overall net additional floorspace. This is likely due to demolition of older premises within some of the larger SILs for redevelopment in B-class uses and construction of residential on part of New Southgate Industrial Estate.

8.3.6 The performance of B8 floorspace is more positive over this period, showing an overall increase of 133,800sqm. Growth was observed across 13 of the 17 periods covered, most notably in 2005, where 48,400sqm of net additional floorspace was delivered, equivalent to 36.2% of the overall change. The only notable contraction of B8 floorspace was in 2012, equivalent to 24,100sqm.

8.3.7 Figure 8-2 presents the distribution of completions by ward.
8.3.8 The figure shows that a positive net change in office floorspace was observed at only four of the 21 wards in LB Enfield over this period (Edmonton Green, Enfield Lock, Jubilee and Winchmore Hill). The largest positive contribution to the office stock is at Enfield Lock, where a net additional 23,100sqm of additional floorspace is provided. This is over five times larger than the next largest ward, Jubilee (4,300sqm), and without which the net loss across LB Enfield would be almost three times larger.

8.3.9 In terms of B1c/B2 floorspace, growth is focused across Enfield Lock and Enfield Highway, where an additional 49,200sqm and 20,500sqm has been provided respectively. This equates to over double (210.8%) the net change across the Borough, meaning that the rest of LB Enfield has seen a contraction of -36,600sqm of B1c/B2 floorspace. The largest contraction is observed at Jubilee, where 24,600sqm of floorspace was lost.

8.3.10 The largest net increases in B8 floorspace is also observed at Enfield Highway and Enfield Lock, where the stock of floorspace has grown by 40,700sqm and 37,700sqm respectively over this period. These two wards collectively represent the majority (58.6%) of all net additional B8 floorspace across the Borough. A further additional 50,900sqm of B8 floorspace has been supported by Edmonton Green and Lower Edmonton (25,000sqm and 25,900sqm respectively), equating to a further 38.1% of the overall net change.

8.3.11 In addition to the completions presented above, there are a number of permissions that have either not been started or are not yet completed. Figure 8-3 presents the quantum of floorspace that is due to come forward from uncompleted permissions, and the floorspace that would be realised if outstanding planning permissions are commenced.
8.3.12 **Figure 8-3** shows that the large majority of permissions not yet completed will be realised. The net impact of permissions already commenced is equal to a net loss of 27,400sqm of office floorspace, while an additional 7,200sqm may be lost if the unimplemented permissions are realised. A total of 34,600sqm could therefore be lost due to development in the pipeline.

8.3.13 For the B1c/B2 use class, the uncompleted developments would result in a net loss of 283,800sqm. This magnitude of loss is over eight times larger than the increase observed historically since 2000. While the unimplemented permissions may increase the overall stock (by 6,500sqm), this nevertheless indicates that LB Enfield is due to see a large contraction in manufacturing floorspace in the coming years. However, the outstanding permissions relating to B8 uses would result in a net additional 367,700sqm of floorspace, almost three times the growth achieved over the period since 2000 (133,900sqm). Of this, the large majority (390,200sqm, or 98.1%) has already been started. Based on started and permissions yet to be implemented the potential net change could be +106,400sqm (approximately 23.6ha assuming a plot ratio of 0.45).

8.3.14 Completions data also provides an indication of the form of office unit that the market requires. This analysis focuses on the form of the buildings constructed and as such only considers the gross size of new units (excluding any lost existing provision).

8.3.15 Of the 16 developments that came forward over this time period that contained some form of office space, the average (mean) unit size was 3,800sqm, which is over four times (420.6%) larger than the average stock size (730sqm). For the B1a and B1b use classes individually, the average size was 1,500sqm and 4,600sqm respectively. This indicates that there is more demand currently for larger scale units, which is reflected that the Borough’s lowest vacancy rates are for office units from 1,000 – 2,000 (0.5%), 2,000 – 10,000sqm (1.0%) and over 10,000sqm (0.0%) in size.

8.3.16 The completions data also provides evidence of new industrial units being relatively large.
in size. Of the 42 and 51 developments that provided some form of B1c/B2 and B8 floorspace, the average unit sizes were 3,700sqm and 4,500sqm respectively, equating to 1,200sqm (49.1%) and 2,000 (81.4%) larger than the average industrial unit size.

**Permitted Development Rights**

8.3.17 One of the drivers of the observed loss of B1a/b floorspace is through Permitted Development Rights (PDR). **Figure 8-4** presents the incidences of office conversions to residential uses in LB Enfield, and resulting loss of B1a/b floorspace in LB Enfield by financial year (FY).

**Figure 8-4 Office to Residential Conversions (2000 to 2016)**

![Graph showing office to residential conversions](image)

*Source: LB Enfield (2016).*

8.3.18 Across the period shown, LB Enfield overall lost 20,300sqm of office floorspace to residential use as a result of PDR. This equates to 9.3% of the total current stock (as presented in **Table 6-5**). These conversions resulted in an additional 564 residential units. **Figure 8-4** shows a significant increase in office conversion activity from FY2013 onwards, reflecting the introduction of PDR in May 2013. Over this period, 14 of the 24 incidences of PDR (63.2%) were observed, and 18,500sqm (91.6%) of total floorspace across this period was lost. The loss of floorspace in FY2013 alone (5,400sqm) was three times larger than measured across the preceding seven years (1,700sqm).

8.3.19 In addition, there are 14 outstanding PDR permissions that have been commenced, that will result in the additional loss of 24,300sqm of office floorspace. This equates to over double (122.2%) the quantum loss observed up to FY2016. In addition, a further 18 applications have been submitted which, if realised, would result in a further loss of 7,700sqm.

**8.4 Summary**

1.1.1 This section has quantified the net additional demand for industrial land and office floorspace and assessed the potential for the development pipeline and PDR to contribute impact on this demand. The forecast for industrial land and office space show a positive requirement. The focus of the next section is how to set policy to accommodate this demand.
9. Conclusions and Employment Land Provision Options

9.1 Introduction

9.1.1 This section sets out conclusions and recommendations for the employment land study building upon findings from previous sections of the report.

9.2 Conclusions

9.2.1 Conclusions are set out for industrial (B1c/B2/B8) land uses and office B1 (B1a/b).

Industry and Warehousing (B1c/B2/B8)

Supply

9.2.2 There are a total of 451.5ha of land currently in industrial use in Enfield, of which 326.2ha of land is occupied by core industrial and warehousing uses or is vacant.

9.2.3 The current provision of industrial floorspace is estimated to be in the region of 1,271,800sqm. Industrial uses lie within areas designated as SIL and LSIS or are on non-designated employment land. This level of floorspace stock is significantly higher than that of any of the other local authorities comprising the FEMA, and its scale emphasises the role that Enfield plays in the provision of industrial space within the North London sub-region and wider property market areas. Geographically, supply is focused along two axes; the Upper Lea Valley in the east, running north to south, and the A206 corridor in the south, running west to east.

9.2.4 The profile of industrial businesses operating within the Borough is mixed, with a reasonable contingent of larger businesses present engaged in logistics and warehousing operations (e.g. John Lewis, Tradeteam, Tesco and Asda), concentrated in the Upper Lea Valley, and SMEs with a local/sub-regional market reach dispersed throughout the Borough though principally in the south and east. Food and drink processing and onward distribution is important both small (ethnic cuisine) and large scale (Gregg’s, Warburton’s). This spread of occupiers means that businesses requirements, in terms of access and quality of land, premises and environs, vary greatly – again, symptomatic of the scale of the industrial market in Enfield and breadth and depth of its business base.

9.2.5 The majority of employment land within existing SIL and several of the LSIS areas remain the most suitable locations in Enfield for accommodating industrial and warehousing demand based on their characteristics and assessed quality. These characteristics are, principally: the excellent strategic road access to markets and supply chains, access to an appropriately skilled workforce, the size of industrial clusters, and the clear demarcation and separation from sensitive uses (allowing 24-hour working required by the strong presence of B8 operators). Their functionality in these respects and others align with the principles and criteria set out in London Plan Policy 2.17. Some less well functioning clusters of industrial land, based on quality, were observed during the survey, comprising several LSIS areas and other non-designated areas, with these conforming less well against both London Plan policy and NPPF principles.

9.2.6 From a property perspective, vacancy among industrial premises is low (lower than levels judged suitable to facilitate optimal operation of the market), vacant land churn is generally strong (illustrating regular demand across a range of premises types and locations) and
rental values are relatively buoyant – all of which point towards supply being in a generally healthy state. This is further reinforced by the pipeline development of high specification premises on a large scale at Enfield Distribution Park (C3), Innova Park (C2) and Navigation Park (C6). The scale of investment at these clusters is illustrative of an optimistic commercial property market willing to make long term investments in Enfield’s industrial future underpinned by pent up demand.

9.2.7 However, take-up of premises within designated industrial areas by non-B use class occupiers is notable, particularly by trade counter and retail uses. The survey observed that this stock often of new, good specification and hold locations with prominence (e.g. gateway / highly visible plots within clusters) with examples within SIL at Lumina Park (C9) and the View 406 (Eley’s Estate, C13). Within LSIS, occupancy by sui generis uses (car-related, e.g. showrooms) is more established and detracts less from the offer of these clusters, though congestion can impact on internal circulation and access within clusters. Amongst some LSIS’ there is however a presence of faith groups, e.g. within Queensway Industrial Estate (C23) and Claverings Industrial Estate (C22), albeit of mostly low quality units. Take-up may mean that real industrial vacancy/availability is artificially low or that industrial occupiers push potential B1c/B2/B8 to look in neighbouring boroughs.

9.2.8 Enfield, as is the case with several other large outer London boroughs, contains a supply of land occupied by wider industrial uses which serve strategically important city-functioning roles. Notable examples include the Enfield Energy Centre (power station) and Edmonton Eco Park. No specific needs have been identified on this review in terms of supporting their ongoing operation.

Demand

9.2.9 Key property market indicators and observations from surveys illustrate a market which is large and diverse but despite its size has low levels of vacancy across a range of unit sizes and locations. Five of the past eight years show a positive net absorption levels, indicating increased take up and rental levels have risen over time but remain competitive, given the relative proximity and accessibility to central London.

9.2.10 The market is active too with a focus on the provision of new high quality specifications particularly around logistics and distribution space, rather than general industrial space for manufacturing. Demand for logistics space is driven by a growing population, changing consumer patterns and habits such as online retailing, click and collect, and changes to the way businesses operate in terms of optimising supply chains, stock holding, last mile delivery and just in time provision. The geography of resident and employment growth, which has been particularly strong in inner London boroughs, has added to the demand for distribution and businesses involved in these sectors are seeking locations on the periphery of Inner London. Evidence from recently completed developments and the pipeline suggest that the market is optimistic about Enfield as a location for logistics provision, perhaps in part due to the scale of industrial land and other key factors such as advantageous strategic road links and land / rental values. It is too early to say whether existing land availability conditions could limit growth but the quantum of B8 use development in the pipeline with planning permissions granted relative but yet to start is small. Contributing to this limitation could be the erosion of industrial land by non B use classes especially trade counter, such as that seen at Lumina Park. Trends suggest that old industrial stock will be recycled over time and to provide new development opportunities.
1.1.2 On the ground a growing demand for warehouses for logistic and distribution uses has, in Enfield, to date, offset any contraction in demand from the manufacturing sector. This is not to say that there is no demand for manufacturing space in the borough, and there are examples of businesses involved in the manufacturing of high technology products.

1.1.3 Whereas historically, since 2001, the provision of industrial floorspace has contracted sharply, falling by 12.7% or c.176,000sqm, and employment has contracted for both industrial and warehousing uses, the projected industrial employment suggests a different growth trajectory – one of positive growth (+19.2% for the period 2016 to 2036). It is suitable to assume that the demand for industrial floorspace will grow. The calculated forecast (unconstrained by supply and other policy requirements) shows that demand for industrial land is projected to be relatively strong between 2016 and 2036, 50.4ha. This represents c.11% of existing stock. The positive forecast reflects the importance of the borough in supporting industrial activities across North London.

9.2.11 There are a number of drivers of change, which could further affect the strength and direction of demand. These include: strategic transport improvements; large scale regeneration; and an accelerated loss of industrial land in North / East / West London, driven by demand and financial gain from redevelopment for other uses, primarily residential, and technology. New models of consumption, production and delivery and land use economics will also shape demand for different locations and forms of accommodation. Many of these factors cannot be easily influenced by local government policy but there are some drivers which can be such as supply, through for instance the release of new development opportunities, and the creation of progressive policies and clear regeneration objectives which can send positive signals to the development community that the borough is pro-development.

9.2.12 The paragraph above highlights a key caveat to the demand forecast: that there are a range of known factors and unknown actions and influences which will impact on Enfield’s long term demand for land. Some of these have already been mentioned above. Other interventions such as Crossrail 2, the impact of which has not been considered in this scope, could radically alter the projection by way of a step change in commuting rail capacity and accessibility, alter the local land use economic context and place a greater focus, for example, on opportunities to realise office provision and residential development.

Comparison of Supply and Demand

9.2.13 A numerical comparison of supply and demand highlights an imbalance. The available marketed industrial land measures only 2.9ha. However, for the purposes of understanding how much of the net demand could potentially be accommodated within existing available supply it is useful to look at vacant floorspace and the pipeline. Vacant floorspace is known to be 4.7% (which can be quantified at 15.5ha) and the total net additional provision of industrial space coming forward in the pipeline, which has been started or yet to be implemented measures 106,400sqm, equivalent to c.23.6ha (assuming a plot ratio of 0.45). Though it is not certain that all of this floorspace will come forward, and not suitable to plan policy making on this basis, the existing pipeline could play a significant role in accommodating projected demand. Based on these three measures the total available supply position is therefore 41.8ha.

9.2.14 With demand is projected to be 50.4ha, including frictional vacant floorspace requirement, the supply and demand balance would be +8.6ha, i.e. a requirement to find additional
industrial land to accommodate projected growth. Even under this optimistic position, where all known supply options come forward, the additional unconstrained land requirement is not met.

9.2.15 In summary, findings suggest a supply constrained position where demand for industrial land is in excess of that which could be currently provided, under availability conditions. However that is not say the market will not act.

9.2.16 The implications of this supply – demand imbalance suggests a need to find a better use of existing space:

- Intensification, i.e. encouraging provision of more efficient use of existing land, such as sites layouts, land intensity (double-storey units, should financials allow), or new workspace formats, allowing higher densities of working across sites and within premises.

- Promoting mixed use development, where suitable to renew existing B use stock and enhance provision. The mixing of uses on site could allow for redevelopment of B use class floorspace and potentially densification by cross subsidising with other uses. Promoting sites for mixed use development with the aim of renewal and reprovision of B uses space or additional B use space requires careful consideration in terms of the types of uses which could be compatibility with industrial uses and their format / layout. An understanding of how business typologies could fit alongside non-industrial uses in mixed use environments is critical to ensuring that long term business operations are perceived positively within a neighbourhood and that the employment space is considered attractive from a market perspective. Appendix C, Table C-1 provides a high level analytical framework for considering the compatibility of different business typologies at various spatial scales within mixed use residential developments, and could be a starting point to inform a mixed use industrial policy.

- Identification of new industrial land sites within the borough (e.g. as part of a call for sites, Housing and Employment Land Availability Assessment or Green Belt review) or with partner boroughs districts as part of duty to cooperate discussions.

- Though there is a positive net demand requirement, consideration should be given to de-designation to allow redevelopment of some of the sites for other uses, especially where these sites lie in close proximity to other uses and lack access to the strategic road network that industrial and warehousing businesses typically seek. Redevelopment of poorer quality sites could release some developmental pressures on other industrial sites.

9.2.17 As stated the forecast is unconstrained by supply and policy, and its value is in indicating the direction and strength of potential change. The decision of how far to plan to accommodate the net additional industrial land requirement needs to be set against wider policy aspirations, as land is finite. Against the backdrop of regeneration policy, population growth and the consequential demand for land to accommodate new housing, social infrastructure and retail space as well as B use employment, the Council, when policy setting, will need to reflect carefully on its priorities.

9.2.18 It may be suitable for policies to be set which look to support long term industrial growth requirements but also provide flexibility to react and respond in the short to medium term, where advantageous to do so. The Council should monitor change in industrial land
demand and respond, keeping in mind the long term strategic goals of its Local Plan.

**Office (B1a/b)**

**Supply**

9.2.19 There is approximately 217,500sqm of office floorspace in LB Enfield, accommodating local level provision servicing local market, with some limited sub-regional reach. This stock is primarily located within or close to the town centre areas of Enfield (C34) and New Southgate (C35) with a further limited presence within the SIL and LSIS areas, including at Innova Park (C2). The stock represents a small proportion of stock in outer London, but reflects the fact that office uses require excellent public transport to flourish.

9.2.20 As discussed in Chapter 6 office floorspace in the Borough is almost entirely engaged in meeting demands of small to medium sized companies with floorspace of fair specification. The market is dominated by a supply of small units, such as at Southgate Office Village (C35), albeit with several larger multi-tenanted premises close to the town centres, with vacancy levels being low both absolutely and relative to the surrounding FEMA. Rents are broadly comparable to the surrounding area, though lower than in neighbouring Barnet.

9.2.21 Stock within industrial areas is mostly low-grade, with exceptions at Innova Park (C2), and often not occupied by office-type users, whereas that in and around town centres is of mostly better or refurbished quality such as Grange House (C35) and Refuge House (C34). Companies located in the Borough tend to be local in their orientation, such as accountants and solicitors, voluntary sector and education linked companies, albeit with occasional exceptions, such as the Metaswitch HQ in Enfield town centre.

9.2.22 When considering the characteristics of Enfield as an office location, PTAL ratings are mostly below that required to attract large-scale development, and attracting occupiers from beyond the local market is and will continue to be a challenge. The stock is therefore characterised as being mostly small and of average quality in terms of offer, though relatively low rental values will continue to attract interest from small businesses with local market reach. Current supply does not cater well in terms of providing grow-on space.

9.2.23 There is some potential for provision of higher density floorspace in locations where accessibility is good or is set to improve, though any such efforts to promote this should be cautious given the existing supply of such premises in other parts of the FEMA, and mixed-use provision typologies should be investigated if taken forward. Locations for this demand are likely to be in the southern Upper Lee Valley around Meridian Water given possible transport improvements.

**Demand**

9.2.24 Our forecasting exercise estimated that there is additional demand for approximately 24,000sqm of office floorspace in the planning period to 2036. This represents an 11% increase to existing stock. The relatively modest projected growth in office floorspace is mainly attributed to trends within the wider PMA and the market's current view on Enfield as a location an office location.

9.2.25 This is not say that demand could be stronger than that stated, particularly if the policy context supported office space growth through, for example, masterplanning of key growth areas such as Central Leeside. The industrial land forecast conclusions stated
above also point to how there is potential for step change in demand, and infrastructure such as Crossrail2, were it to come about, would act as a significant driver of office space demand.

**Comparison of Supply and Demand**

9.2.26 There is limited availability of office space in the market (1.1%) at current and there is limited vacant land providing opportunities for office development. PDR threatens loss of office space, which would add to the net space requirement. The absolute projected scale of demand is relatively small which could be accommodated through redevelopment of existing employment land or other sites.

9.2.27 Where compatible new office space could be provided as part of a site’s intensification and mixed use development. In particular new office could be provided as part of large residential schemes, such as that at Edmonton Leeside, given that uses are compatible. Mixed use provision needs to be carefully planned however. Appendix C, Table C-1 provides an analytical framework for considering the compatibility of office space with industrial and residential uses, which could inform policy thinking.

9.3 **Recommendations**

**Industry and Warehousing (B1c/B2/B8)**

**Retention**

9.3.1 At present, LB Enfield through its Local Plan designates industrial employment areas as Strategic Industrial Locations and Locally Significant Industrial Sites; designations which are consistent with London Plan policy 2.17 regarding the protection of industrial land. Such designations ostensibly protect these sites from redevelopment for non-B uses.

9.3.2 This review has concluded that the majority of SIL areas in the Borough are suitable and recommended for retention as such going forward, on the basis of their characteristics and suitability against London Plan and NPPF/PPG criteria. These areas, accounting for 93% of SIL land and 65% of the Borough’s total industrial land stock73, are:

- Freezywater (Cluster 1)
- Innova Park (C2)
- Brimsdown (C3, 4 and 5)
- Meridian Business Park (C6)
- Redburn Trading Estate (C7)
- Great Cambridge Road and Martinbridge Trading Estate Part A (C8)
- Great Cambridge Road and Martinbridge Trading Estate Part B (C9)
- Montagu Industrial Area North (C10)
- Aztec 406 (C12)
- Eley’s Estate (C13), and
- Edmonton Eco Park (C14).

---

73 Total industrial land stock includes ‘core’ and ‘wider’ uses, vacant land, and also land in uses other than B1c/B2/B8 which lies within designated industrial land, i.e. SIL and LSIS (e.g. office).
9.3.3 Enfield’s LSIS portfolio comprise mostly well performing smaller estates and single-occupier sites, and/or serve an important function in providing both local jobs and products that cater to the needs of the local economy. Those LSIS which this review recommends should be retained over the Local Plan period to 2036 account for 71% of the total area designated as LSIS and 5% of Enfield’s industrial land stock. These are:

- New Southgate Industrial Estate (C17)
- Oakthorpe Dairy (C19)
- Commercial Road and North Middlesex Estate (C20)
- Lanhedge Lane Industrial Estate (C21), and
- Queensway Industrial Estate (C23).

Change

9.3.4 In order to meet the needs of businesses for land and premises and to facilitate their continued contribution to the local and regional economy over the Local Plan period, it is important that the Council takes a proactive approach to planning to support growth, facilitating positive change which goes beyond maintaining the status quo.

9.3.5 Whilst the great majority of designated industrial land in Enfield is recommended for retention for the Local Plan period to 2036, this review has identified opportunities for intervention that the Council should consider which would act to change the supply of industrial land or characteristics of industrial areas and plan proactively to support growth. These can be classified and defined as locations which could support:

- Intensification
- Mixed-use development (where regeneration opportunities exist and demand/appetite), or
- See the release of poor quality designated employment land for more productive means.

Intensification

9.3.6 Intensification of industrial land could occur in several ways, such as; increasing building footprints within sites and plots; use of vacant land, and; changing the form or typology of buildings to provide more workspace.

9.3.7 There are several reasons why intensification of industrial land and premises is considered appropriate in Enfield, both local and wider. As assessed in section 7, there is a net requirement for additional land to accommodate industrial activities (primarily B8) over the Local Plan period, and a lack of opportunity to designate additional land to meet this. On top of this, the stock of industrial land is contracting due to pressure from higher-value uses, most notably residential, though in Enfield this has mostly occurred on non-designated sites generally of poorer quality.

9.3.8 There is therefore an identified need to do ‘more with less’ land, both in Enfield and across Greater London, as acknowledged by various publications even in spite of the majority of the Borough’s industrial land being well-suited for ongoing industrial use. Intensifying well-performing areas may in-turn provide justification for allowing redevelopment of some poor quality sites to meet regeneration objectives where appropriate (see Release below).

9.3.9 Regarding increasing the size of building footprints, whilst some potential examples were
identified during the survey of employment land, there is very limited opportunity to achieve this given densities are already high/sites well-used, reflective of Enfield’s maturity as an employment location. Whilst some vacant land has been identified (see section 4), this represents a very small proportion of Enfield’s industrial land stock and the churn of vacant sites is noted to be very strong.

9.3.10 It is therefore considered that the primary opportunity with regard to intensification lies with changing building typologies. The overwhelming majority of industrial premises in Enfield are single-storey. Whilst this is not untypical of industrial areas the GLA, developers and other actors are exploring the potential to introduce stacking or dual-storey industrial units, to serve the needs of manufacturing and potentially distribution and logistics businesses, especially given the greater land/site requirements of the latter. Other innovative typologies may also serve to intensify the use of industrial land, including examples from the retail sector which itself has a presence on industrial land in Enfield.

9.3.11 It is not within the remit of an ELR to identify/specify the means by which new typologies can be introduced (including advising of relevant consenting considerations), however broad areas where intensification would be appropriate have been identified, comprising mostly SIL areas. These include, though should be not limited to:

- Brimsdown (C5, particularly given characteristics, and to a minor extent C3 and C4)
- Great Cambridge Road and Martinbridge Trading Estate SIL (C8 and C9)
- Aztec 406 (C12), and
- Eley’s Estate (C13).

Mixed-use development

9.3.12 A means by which new employment space of specification appropriate to the needs of modern occupiers can be delivered would be via mixed-use redevelopment of sites where transport accessibility and access to facilities and amenities is strong enough to support non-B uses and B1a/b/c uses (which are those most likely to be compatible with each other). Development of floorspace could occur whereby new industrial premises are built within the same site footprint as residential/retail uses but are segregated. It could also occur through provision within the same building, albeit the range of industrial uses permitted maybe lessened.

9.3.13 Much of the justification for intensification of industrial land is also applicable to the argument for promoting mixed-use development. Additional justification is that incorporating higher-value use development with lower may serve to make the latter (industrial uses in this instance) more viable and thus sustainable over time. Further justification is that policy pertaining to Permitted Development Rights is such that residential development can already occur within designated industrial areas where offices are found, and so the integrity of industrial areas may be challenged, if left unchecked – by proactively planning the incorporation of industrial uses with non-B uses, the impact of any such development may be lessened, or even managed to an advantage.

9.3.14 The majority of Enfield’s industrial land lies within the south-east and north-east of the borough. Presently, these areas have generally low transport accessibility and access to facilities and amenities that higher density, mixed-use development would require and, for the moment, such development may therefore not be viable, if deemed appropriate. Equally, most of these areas are considered to be well-functioning and thus the impetus for mixed-use development may not exist. Opportunities may however exist in the south-
east over time through planned regeneration at sites already close to stations, for example, at and around Edmonton Leaside, such as potentially at Harbet Road (C15) and the non-designated Argon Road (C32) industrial estates which lie close to Angel Road station, or Queensway Industrial Estate (C23).

Release of designated industrial land

9.3.15 In keeping with the principles of the NPPF, when local planning authorities are assessing the appropriateness of their employment land stock for ongoing use, taking into account wider regeneration objectives and demand for other use, particular consideration should be given to sites which are in poor quality or are underused. Where such sites are identified, local planning authorities could permit a change of use away from industrial use. In Enfield’s case this applies both to sites which are designated as LSIS and non-designated sites, though change of use may already be permitted at the latter, if criteria are met.

9.3.16 Release of designated sites does not automatically mean the loss of the industrial uses and employment on-site, but opens the possibility for the market to intervene to provide sustainable redevelopment under the right conditions. It remains noted also that there is a projected net demand for industrial land in the borough over the Local Plan period and such de-designation should be similarly limited.

9.3.17 Amongst the borough’s designated LSIS areas, Alma Road (C16), Regent’s Avenue (C18) (though bus depot site unlikely to be redeveloped) and Claverings Industrial Estate (C22), which although may meet local demand for affordable premises, are considered to be of poor quality when considered against NPPF/PPG and GLA criteria and contain a presence of non-employment uses. They lie in close proximity to other uses and, with the exception of C18, lack good access to the strategic road network. Consideration should therefore be given to de-designation/release of these sites from the LSIS classification to permit redevelopment for other uses if market conditions dictate.

Office Uses (B1a/b)

9.3.18 As outlined above, the market for office floorspace in Enfield is limited in size and mostly serving demand from local businesses for traditional office activities, particularly accountancy, business support services, and third sector and voluntary organisations. Quality of stock varies between good and functional in the town centres to mostly poorer quality units in LSISs where stock is present. Affordable units and floorspace is most demanded and the existing stock serves these needs well.

9.3.19 The forecasting exercise suggests that there is a relatively modest yet ultimately positive net additional demand for office floorspace over the Local Plan period to 2036. Based on the evidence base the most suitable locations for accommodating this additional demand will be Enfield and New Southgate town centres. The Council’s LSIS designation deems that industrial uses are preferred within these areas and therefore evidence for supporting provision within these areas is weak and is not recommended.

9.3.20 However where mixed-use development opportunities as discussed above present themselves, it may be appropriate to accommodate a quantum of B1 a/b space within redeveloped sites, such as at Edmonton Leaside. As noted above, mixed-use development of reasonable density should occur only where PTAL ratings and access to facilities and amenities allow.
9.4 Monitoring

9.4.1 This study has identified that there is a positive net demand for land and floorspace both for industrial and office uses. Whilst monitoring of both take-up of vacant land/floorspace/units and of change to non-employment uses is important to ensure effective spatial planning, it is particularly important here in Enfield where demand for land/floorspace may exceed supply, and thus unmanaged changes/contractions in stock may harm economic growth.

9.4.2 Courses of action that the Council could take to effectively monitor the uptake and change of use of land and floorspace, and justification for them, are outlined below.

Industry and Warehousing uses (B1c/B2/B8)

Non-designated industrial land

9.4.3 The Council’s SIL and LSIS designation provide protection for the majority of industrial land in the borough and will continue to do so if the above recommendations are implemented. There is a supply of non-designated industrial land that lies outside these areas and are thus for the most part unprotected from redevelopment for other uses, amounting to around 27.6 hectares of land in core industrial use (industry and warehousing) and a further 2.2 hectares in use for waste management.

9.4.4 To help ensure that not too much industrial land changes use over the Local Plan period to 2036 the Council could introduce a policy in the that states that such non-designated industrial land, much of what was surveyed was assessed as of decent quality, will ideally only change to alternative uses if all of the following criteria are met:

- There is no evidence of current or future market demand for the site as evidenced through a period of at least 24 months of active marketing for industrial employment uses at realistic market rates
- poor access from the strategic road network i.e. they can be accessed only via local roads; and
- a lack of on-site servicing such as loading/unloading bays and/or inadequate parking provision.

Take-up of premises within designated land by retail, trade counter and sui-generis occupiers, and faith groups

9.4.5 The survey of employment land and consultations agents identified take up of land and premises within designated areas by retail and trade counter uses was a notable and increasing trend. Where such take-up occurs it is often of new and good quality premises which can have the unwanted effect of reducing the supply of such premises available to industrial firms, both those already based in Enfield and those looking to relocate there (potentially due to land value pressures in inner London). This likely reduction in industrial floorspace stock may be at the cost of economic growth given the positive net demand for land and floorspace identified in this ELR. Conversely, vacancy/availability levels of industrial premises may be artificially lower than expected due to such occupancy which may mean that planning to meet demand could take a wrong course.

9.4.6 To address this it is recommended that a more effective monitoring of take-up by these occupiers is implemented, potentially through policy or through development control actors. It is understood that the Council is preparing an updated retail use study, the
outcomes of which could point to means in which demand for uses is met which does not impact on the supply of industrial land, especially within SIL areas, such as Great Cambridge Road and Martinbridge Trading Estate (C8 and C9).

**Occupy by Faith Groups and Sui-generis occupiers**

9.4.7 Faith groups and sui-generis occupiers were observed to have a notable presence within parts of the Borough’s industrial land supply particularly within the LSIS clusters surveyed. The former are likely attracted by lack of suitable premises and the low cost of the often poor quality units that they occupy, with the latter being, in some cases, a more established user of industrial floorspace. The presence of faith groups may deter occupancy of neighbouring units/premises due to a degree of real or perceived use incompatibility, and potentially impact upon parking availability within such clusters. Whilst some sui-generis uses are broadly analogous to industrial uses in their characteristics and site requirements, others such as car showrooms and auction centres are considered comparable to retail uses and are also mostly low intensity uses, from an employment perspective making them not consistent with industrial land use designation policies.

9.4.8 Again within the context of there being a positive net demand for industrial land and floorspace over the Local Plan period, it is recommended that the Council employ more effective means to monitor the uptake of industrial premises. If unauthorised occupancy is identified, then proactive measures of enforcement should be undertaken. This will help ensure that land and floorspace designated for industrial use, such as within LSIS at Queensway Industrial Estate (C23), remains available for purpose.

**Office (B1a/b)**

9.4.9 Given the positive forecast for office floorspace demand to 2036, there is some need for the Council to promote the development of new space of appropriate specification in the locations noted above, i.e. principally the town centres. However, it should also act to ensure that existing fit for purpose space is retained and redevelopment of such space resisted unless where replacement provision is proposed, in order that demand and supply are kept in balance.

9.4.10 As noted above, PDR for office to residential development has resulted in a significant contraction of office floorspace since its introduction in 2013, with some 11% of B1a/b floorspace being converted to residential units if compared against current stock. It is possible that as such opportunities become scarcer, smaller office workspace may become subject to prior approvals being sought, where deemed viable. To ensure sufficient supply is retained to meet forecast demand, the council should seek to scrutinise these proposals, through whatever means available, to avoid harming local economic growth.

9.4.11 Means by which proposals could be scrutinised is through an article 4 direction whereby the scope of PDR can be restricted with respect to certain sites or areas, or for particular types of development such that these require planning permission to be sought rather than prior approval. Areas typically subject to article 4 directions are particular town centres, key development sites, or designated industrial areas. In the latter, this study considers it particularly important that redevelopment of offices in SIL and LSISs via PDR be resisted given the potential for the introduction of residential given rise to conflict between established businesses and new residents, resulting in the loss of integrity of these key reservoirs of land as employment areas.
Appendix A : LB Enfield’s Functional Economic Market Area

The UK Planning Practice guidance outlines that ‘need’ should be assessed within the context of a Functional Economic Market Area (FEMA). The guidance does not offer a standardised approach to defining a FEMA but it does provide a list of indicators that could potentially be used to. The indicators include:

- "The extent of any Local Enterprise Partnerships (LEP) with the area;
- Travel to work areas;
- Housing market area;
- Flow of goods, services and information within the local economy;
- Service market for consumers;
- Administrative area;
- Catchment areas of facilities providing cultural and social well-being; and
- Transport network”.

Considering the focus of this study on employment land. Enfield’s travel to work area, transport network, flow of goods, services and information and housing market are reviewed below to help define Enfield’s FEMA. In addition, it reviews the similarity of surrounding authorities to Enfield and how these areas may be competitors to Enfield in the economic context of London and the wider South East.

Travel to Work Area

Where a local authority’s resident population travels to work and where its own workforce comes from, can give an indication of where knowledge and information flow to and from the local authority. The 2011 Census includes origin and destination statistics, which give an indication of workforce flows between local authorities within England and Wales.74

Based upon the origin and destination statistics, LB Enfield has two common travel to work patterns. The first is that residents in employment are more likely to work outside of the Borough and that the most common local authorities that they commute to are in central London. Table 4-4 shows that the five local authorities which Enfield residents work in are City of London and City of Westminster, Haringey, Barnet, Camden and Islington.

The second pattern is that the Borough’s workforce, excluding residents, comes from the local authorities which border it. The local authorities with the four largest borders with Enfield (Barnet, Broxbourne, Haringey and Waltham Forest) provide the four highest proportions of workers (6.4%, 6.3%, 5.7% and 4.4% respectively). Further details are presented in Table 4-5.

The patterns of commuting to and from Enfield suggest that the Borough’s economy is interlinked with the Central Activities Zone (CAZ), central London and the local authorities which neighbour it. However, given that the Borough’s businesses are quite reliant on labour from neighbouring local authorities, the patterns do suggest that Enfield’s own economy is more reliant upon knowledge and information from neighbouring local authorities and not central London.

---

74 Office of National Statistics (ONS), (2011); Census.
Transport Network

Enfield has good road connections as the North Circular inner ring-road goes right through the heart of the Borough, linking in with Barnet, Waltham Forest and Redbridge. In addition, the A10 dual carriageway goes north to south through the Borough connecting Enfield to Broxbourne and Haringey via a major road connection. When the A10 reaches the Borough’s border with Broxbourne it crosses Junction 25 of the M25. This provides Enfield with direct motorway connections to Hertsmere (Junction 23), Welwyn and Hatfield (Junction 24) and Epping Forest (Junction 26), and removes the need to use local roads that go across Enfield’s borders into the neighbouring local authorities.

The WAML, East Coast Mainline and Hertford Loop Line all go through the Borough, providing it with direct rail access to Liverpool Street, Kings Cross, Moorgate, Cambridge and Stansted. Additionally, the Borough is the terminus for the Piccadilly line, ending in Cockfosters ward. In total, Enfield has five stations connected to the Piccadilly line.

The rail connections are likely used by residents commuting to work in Central London or to Stansted to catch business flights from the airport, while the Borough’s access is likely more important to the Borough’s businesses and the people commuting into Enfield. The Borough has a high number of logistics, distribution and manufacturing businesses located in industrial estates such as Brimsdown that likely rely upon the road network to deliver goods. Additionally, public transport connections are not as good with the surrounding non-London local authorities, so many workers coming to Enfield will likely commute by car.

Flow of Goods, Services and Information

Based upon Enfield’s travel to work patterns and the Borough’s transport network, flows of goods, services, information and knowledge flows into the CAZ and central London by residents commuting there through public transport such as the Piccadilly line and goods being delivered via the Borough’s road connections.

The second is the flow of labour from neighbouring local authorities to work in Enfield and goods being brought on the wider strategic road network to be distributed in London via Enfield’s distribution and logistics hubs. Additionally, components will be delivered to Enfield’s manufacturing businesses on the network given how supply chains in today’s economy span regions rather than being localised except in certain unique circumstances.

Housing Market

The Council’s latest Strategic Housing Market Assessment (SHMA) reviews what Enfield’s local housing market is. The SHMA concludes that Enfield can be considered as a local housing market in its own right, but that there are also limited links with neighbouring Broxbourne and Welwyn and Hatfield. It should also be noted that Enfield has connections with Barnet, Haringey and Waltham Forest through people moving between the local authorities.

Similarities to other Local Authorities

In 2015 the Office of National Statistics (ONS), based upon the most recent Census.

---

75 LB Enfield, (2015); Strategic Housing Mark Assessment Update – Final Report.
provided a measure to review the similarities of different local authorities in England\textsuperscript{76}. Using the measure Enfield is identified as being most similar to these local authorities in the following order: Croydon; Barnet; Waltham Forest; Redbridge; and Barking and Dagenham. In addition, Enfield is in the named in the following local authority top fives: Barnet (1st); Croydon (1st); Barking and Dagenham (2nd); Redbridge (3rd); Waltham Forest (3rd); and Hillingdon (5th).

\section*{Enfield’s FEMA}

Based upon the above analysis of Enfield’s travel to work patterns, transport network, flow of goods, services and information, housing and statistical similarities, Enfield’s FEMA is defined as being formed of the following local authorities:

- Barnet;
- Broxbourne;
- Haringey;
- Hertsmere;
- Redbridge;
- Waltham Forest; and
- Welwyn and Hatfield.

Enfield is economically connected with the CAZ and Central London, but the relationship is not two way. Enfield’s stronger economic linkages are with neighbouring local authorities rather than central London. The Borough’s FEMA could change in the future were there to be large scale interventions such as the regeneration of Meridian Water and Crossrail 2, which would both widen the opportunities for attracting businesses but also increase economic competition with other locations.

\textsuperscript{76} ONS, (2015); Area Classifications for Output Areas: 2011.
Appendix B: Mapping of Supporting Information

Figure B-1 Industrial Employment Density

Source: AECOM 2016.
### Figure B-2 Non-B Use Employment Floorspace

**KEY:**
- London Borough of Enfield Boundary
- Employment Cluster
  - SIL
  - LSIS
  - Town Centre
  - Non-Designated
- Non-B Use Employment Floorspace
  - High
  - Medium
  - Low

<table>
<thead>
<tr>
<th>% Non-B Use Floorspace</th>
<th>% Non-B Use Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>&gt;30%</td>
</tr>
<tr>
<td>Medium</td>
<td>&gt;15%</td>
</tr>
<tr>
<td>High</td>
<td>&gt;30%</td>
</tr>
</tbody>
</table>

Source: AECOM 2016.
Figure B-3 Non-B Use Employment Floorspace

KEY:
- London Borough of Enfield Boundary
- Employment Cluster
  - SIL
  - LSIS
  - Town Centre
  - Non-Designated
- Employment Floorspace Density
  - High
  - Medium
  - Low

| Use Floorspace per Hectares of Employment Land |
|----------------|---|
| Low            | >0 | 35% |
| Medium         | >35% | 60% |
| High           | >60% |

Source: AECOM 2016.
Figure B-4 Road Delay Morning (AM)
Figures represent delays in seconds; longer delays presented as thicker lines

Source: AECOM; SATURN Software Transport Modelling
Note: Simulation links: Flow-weighted delay to include: (a) transient delays, (b) V>C queuing delays and (c) any delays associated with link capacity restraint (speed-flow) curves.
Figure B-5 Road Delay Afternoon (PM)
Figures represent delays in seconds; longer delays presented as thicker lines

Source: AECOM; SATURN Software Transport Modelling
Note: Simulation links: Flow-weighted delay to include: (a) transient delays, (b) V>C queuing delays and (c) any delays associated with link capacity restraint (speed-flow) curves.
Appendix C : Mixed Use Typologies

Business Typologies and Compatibility with Mixed Use Development

The co-location of employment and residential uses can be implemented at various spatial scales including:

- The individual building scale - mixing uses within a single building horizontally or vertically;
- The block scale - mixing single use buildings adjacent to one another in a neighbourhood block; and
- The multi-block scale - mixing single use blocks across a larger area.

An understanding of how business typologies can fit alongside non-industrial uses in mixed use environments is also critical to ensuring that long term business operations are perceived positively within a neighbourhood and that the employment space is considered attractive from a market perspective.

Figure C- provides a high level analytical framework for considering the compatibility of different business typologies at various spatial scales within mixed use residential developments. It is colour coded to indicate the potential scale of design considerations in integrating each typology within a residential led mixed use development. These design requirements include access and servicing of units, negative environmental (such as air quality, visual, noise or congestion) and exterior and interior design.

Figure C-1: Employment Typologies and Mixed Use Development

<table>
<thead>
<tr>
<th>Typology</th>
<th>Compatibility at Multi-block Scale</th>
<th>Compatibility at Block Scale</th>
<th>Compatibility at Building Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small Office Type Space</td>
<td>Fully compatible</td>
<td>Fully compatible</td>
<td>Fully compatible</td>
</tr>
<tr>
<td>Large Office Type Space</td>
<td>Fully compatible</td>
<td>Fully compatible</td>
<td>Some design considerations</td>
</tr>
<tr>
<td>Workshop Type Space</td>
<td>Some design considerations</td>
<td>Some design considerations</td>
<td>Some design considerations</td>
</tr>
<tr>
<td>Small Industrial / Warehousing Type Space</td>
<td>Some design considerations</td>
<td>Significant design considerations</td>
<td>Significant design considerations</td>
</tr>
<tr>
<td>Large Industrial / Warehousing Type Space</td>
<td>Some design considerations</td>
<td>Significant design considerations</td>
<td>Not typically suitable</td>
</tr>
<tr>
<td>Yard / Open Storage Type Space</td>
<td>Significant design considerations</td>
<td>Significant design considerations</td>
<td>Not typically suitable</td>
</tr>
</tbody>
</table>

Source: AECOM.

As Figure C- shows, office and light industrial workshop type spaces are largely compatible (in functional and design terms) with mixed use development at all spatial scales.
scales. The use classes associated with these typologies (B1a/b/c) are mostly desk based activities such as creative services and industries, professional and business services, light industrial activities and research and development operations. These businesses can be considered ‘clean’ industries, have minimal environmental considerations, relatively less service and access requirements compared with distribution businesses due to the lack of deliveries of goods and are more easily integrated into mixed use developments horizontally or vertically.

Successful integration of industrial and warehousing typologies into mixed use development would require more consideration of the design of access and servicing including appropriate access and circulation space for goods and service vehicles and potential separation of access and servicing routes from residential users. Consideration would need to be given to the hours of operation of likely employment activities and any restrictions which could be placed on industrial uses. Uses associated with these typologies have the potential to generate environmental issues for sensitive nearby receptors given the nature of the activities they accommodate and the frequency of deliveries they are likely to generate. Sensitive design of appropriate environmental mitigation measures to control air and noise emissions should also be considered.

**Considerations for Redevelopment**

The compatibility of business typologies with mixed-use development is primarily determined by the operational requirements of businesses and the potential adverse environmental considerations arising from business activities.

For the purposes of this study the operational requirements of existing business activities are taken to include:

- Access requirements, including suitable access and circulation routes- e.g. for heavy goods vehicles;
- Servicing requirements, including the frequency of servicing - e.g. off road or on road loading/unloading; and
- Parking requirements for customers and staff.

Potential adverse environmental characteristics of existing business activities which could affect the successful integration of these activities with more sensitive uses such as residential are also considered and include:

- Adverse noise, visual and air quality impacts
- Consideration of the nature of activities taking place (e.g. heavy industries vs clean industries) and
- Businesses’ likely requirements for hours of operation.

Operational requirements and potential adverse environmental activities of the existing business typologies on site have been considered and a view provided on the extent to which these activities could be integrated into redevelopment proposals at three scales:

- Multi-block;
In addition, development viability can influence whether business typologies are compatible alongside non-business uses. Introducing mixed-use development within designated industrial areas will impact on land values and rents, which could affect the retention of industrial and warehousing uses. Though residential land values may be significantly more than industrial land values, industrial land provides economically viable space for businesses and industrial activities including lower value, affordable space. Over time as the stock of industrial land contracts industrial land values are expected to increase relatively faster.