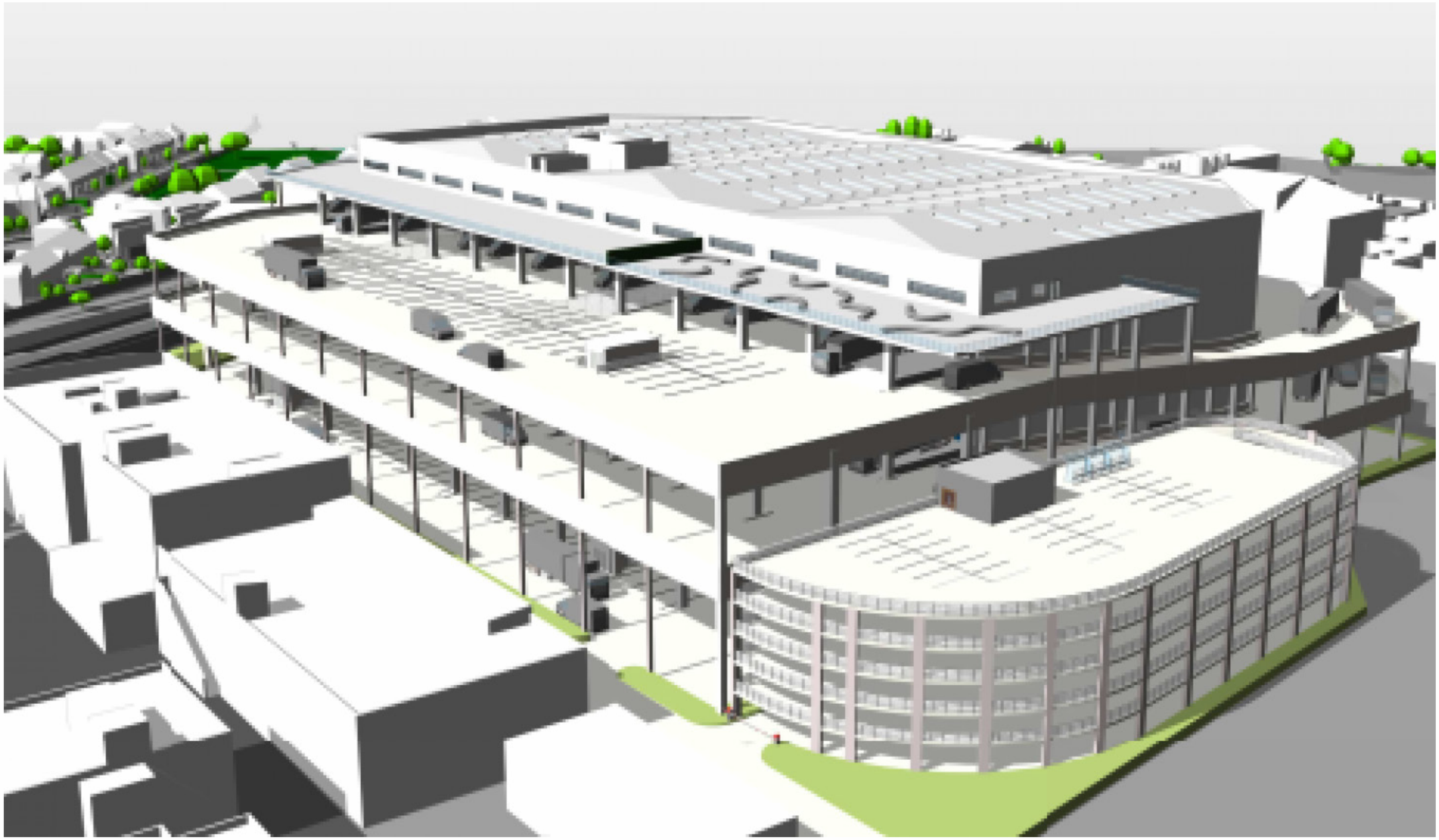
Industrial Land Intensification Study

May 2021, with updated figures (October 2021)



Industrial Land Intensification Study
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Industrial Land Intensification Study Purpose

This study informs the Bexley Local Plan, specifically the spatial strategy, land use strategy and employment land policies, ensuring conformity with London Plan Policies E4–E7.

In addition to providing a robust evidence base for the Local Plan, this study will inform design guidance to be included in the forthcoming Design Guide Supplementary Planning Document (SPD). Guidance on the intensification of industrial land will be set out in the SPD to assist developers in making best use of employment land in the borough.

Area strategies that in part cover the borough's employment land will also be informed by this study. The forthcoming Bexley Riverside OAPF and Housing and Land workstream associated with the Abbey Wood to Ebbsfleet (AW2E) Connectivity Study will use this study as the basis for spatial approaches to the future of land in the north of the borough.

The study sets out recommendations for delivering intensification through the development management process and inform future engagement with landowners. The identification of specific intensification opportunities and the development of associated delivery strategies will be progressed through the Belvedere Design Pilot.

This pilot project will, in collaboration with the GLA's Housing and Land Team, develop site specific proposals building upon the work in this strategy. In addition to further testing the architectural resolution of intensification typologies, the study will also provide transport and commercial analysis of intensification sites. This will identify particular infrastructural deficiencies that may need resolving in order to deliver intensification and provide further demand-side analysis of the industrial market in the Belvedere area. The Belvedere Design Pilot will also inform the Abbey Wood to Ebbsfleet (AW2E) Connectivity Study and Bexley Riverside OAPF.

Industrial Intensification Policy Review

NPPF

National policy seeks to encourage efficient use of land. Specific reference to making use of space above commercial uses supports vertical intensification of industrial land.

In areas of high housing demand, the use of employment land for homes is supported, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres.

Aside this spatial intensification, the NPPF supports a shift to higher value activities, such as provision for clusters or networks of knowledge and data-driven, creative of high technology industries. Storage and distribution operations at a variety of scales are also encouraged.

London Plan

The plan sets out a number of policies that have significant impact on industrial development in the borough. Policy E4 requires boroughs ensure a sufficient supply of land and premises be provided and maintained taking into account the evidence in employment land reviews, industrial land audits and the potential for intensification, co-location and substitution. Intensification is defined as an increase in employment space by site area.

Policy E5 and E6 state that boroughs should set the boundaries of SIL and LSIS having regard to the scope for intensification, and to develop local policies to protect, intensify and make best use of land of SILs.

Policy E7 requires that boroughs are proactive in encouraging intensification to facilitate the consolidation of SIL or LSIS and supports optimising the potential of industrial sites for housing on selected parts of SIL or LSIS where existing capacity can be consolidated or appropriately substituted. This should be done through a carefully co-ordinated plan-led approach.

The plan encourages a proactive, plan led approach to encouraging the intensification of business uses in Use Classes E(g)iii, B2 and B8 occupying all categories of industrial land.

This intensification must protect industrial activities, particularly those requiring 24-hour operation. Challenges in creating good quality living conditions and operational industrial spaces should be resolved through design. The plan sets out a higher affordable housing requirement where the scheme would result in a net loss of industrial capacity.

In consultation with the GLA, LBB has agreed a series of industrial compensation principles that ensure the development capacity of sites are optimised and delivers the retention of industrial capacity.

This real-world capacity and demand will be realised by measuring supply and capacity in terms of floorspace and operational yard space.

LB Bexley Growth Strategy

The vision for growth in the borough focusses on the opportunity areas in the north of the borough within the context of the wider sub-regional focus of development within the Thames Gateway. Release of industrial land for mixed use development plays an important role in the creation of integrated town centres and maximising the growth potential of infrastructural improvements in these areas.

The growth strategy identifies logistics, construction and manufacturing as key sectors. In recent years, growth has also been in education, health, scientific and technical activities.

The Growth Strategy defines four economic ambitions for the borough:

- Use growth to secure economic development – investment in infrastructure, particularly in public transport, to create opportunities whilst ensuring housing development creates employment locally.
- Create a broader, more resilient and higher quality economic base – encourage the growth of a wider range of sectors, such as low carbon goods and services and food production. Manufacturing and cultural offer are elements of a broader 'maker movement' that could be fostered.
- Make Bexley a thriving and ambitious place of opportunity through education and employment – opportunities for training to ensure local people can benefit from growing sectors and higher value added activities.
- Enhance Bexley's image – developing an identity that draws on the borough's heritage

Core industrial areas retained for employment will be improved and intensified, fostering a growing movement of artisans and other manufacturers.

Areas of protected industrial land that is released will be re-purposed to allow for housing, other commercial activities, live/work units, and land for necessary services and facilities such as schools, medical centres and open space.

New employment space will attract new and emerging sectors to growth areas, enabled by improved transport and digital connectivity.

New development, both employment led and residential, will draw upon existing industrial heritage to attract new economic sectors and create residential areas with a distinctive character.

LB Bexley Local Plan Regulation 18 Consultation Draft

The plan focusses growth in parts of the borough with high levels of existing industrial uses and SIL/LSIS designations.

The plan sets out a need to stimulate land-use intensification in the most sustainable employment locations, particularly uses that increase employment densities and broaden the mix of business uses in employment areas.

Whilst encouraging the release of employment land for mixed use and residential development, the Council will promote sustained economic development and employment growth by protecting designated strategic industrial locations.

In designated SIL and LSIS Class E(g)iii, B2 and B8 will be permitted and safeguarded. In addition, E(g)i Offices will be permitted in the Foots Cray Business Area.

Policy Review
Growth Strategy – Key Diagram

Good growth will be secured by focussing new residential development on a series of well-connected public transport nodes, making the most of Bexley's riverside location and industrial heritage. Core industrial areas retained for employment uses will be improved and intensified, fostering the growing movement of artisans and other manufacturers. The borough's valued suburban heartland and quality open spaces will be preserved and enhanced. Shopping, culture and leisure facilities will be vibrant, supported by innovative industries and businesses.

A new neighbourhood will be created in Belvedere focussed on a public transport interchange including a potential new Crossrail station and a new town centre that will host a sub-regional shopping destination. Up to 8,000 new homes will be accommodated, with the area generating up to 3,500 new jobs.

Erith will provide the opportunity to deliver an exciting and well-connected urban river front destination of up to 6,000 new homes, with the area supporting up to 2,000 new jobs through a shift to new engineering and manufacturing activities.

Thamesmead will provide up to 4,000 new homes and 5,000 new jobs, triggered by the Mayor's Housing Zone and a new Crossrail station and supported by local transport improvements, a new local centre at Abbey Wood station and with better access to green and digital infrastructure.

Situated next to one of London's remaining marshlands along the River Thames, Slade Green will be transformed into a high quality neighbourhood with a new local town centre set around a potential new Crossrail station and access to outstanding recreational spaces, delivering up to 8,000 new homes and 1,000 new jobs.

Crayford will provide the opportunity to consolidate and redefine the town centre, opening up the north of the area to up to 1,000 new high quality homes with increased access to a more naturalised River Cray. Employment will remain important to Crayford, with uses consolidated to the east, delivering 1,000 additional jobs.

KEY

- New District Centre
- District Centre
- Major District Centre
- Focus of New Development
- Metropolitan Open Land/ Green Belt
- Rivers
- Opportunity Area
- New Local Centre
- Railway line and station
- Crossrail and station
- Potential Crossrail ext.
- Potential DLR Extension
- Potential River Crossing
- Potential Rapid Transit

Growth Strategy Key Diagram

Source: LBB Growth Strategy

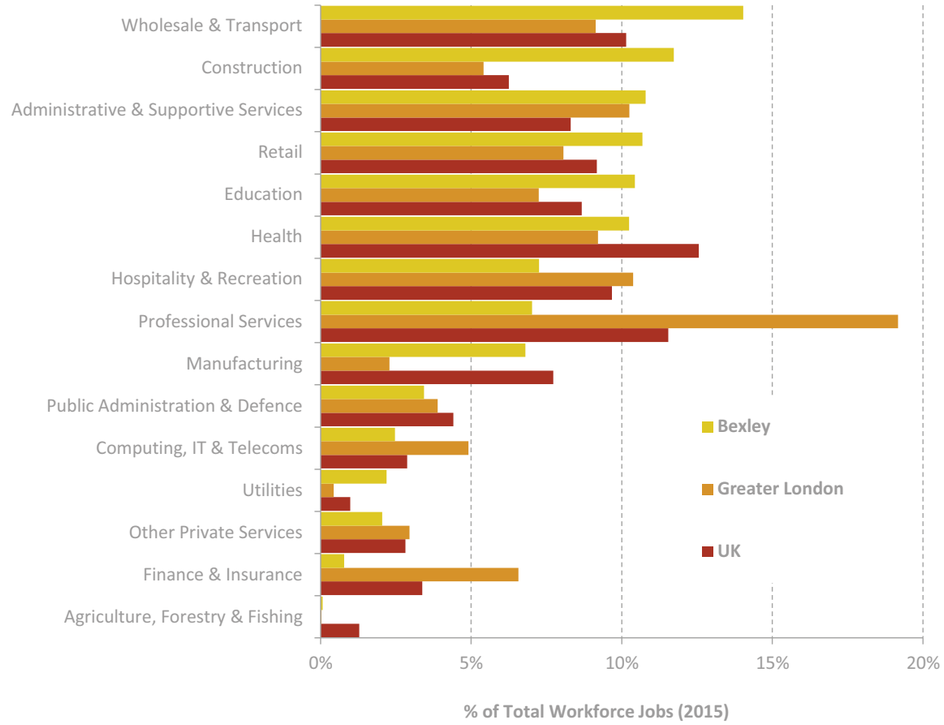
Employment

General employment trends

- In recent years Bexley has lagged behind London in terms of employment growth.
- Bexley is a significant net exporter of labour to local areas, principally to Central London.
- Employment is generally concentrated in the north and east of borough.
- Having plateaued for roughly a decade, employment has grown steadily since 2011.
- Industrial jobs have accounted for the majority of this growth since 2011.
- Identified growth areas in the boroughs currently account for 30.3% of B class floorspace, 8.7% of total businesses and 16.5% of total employment in the Borough.

Makeup of the workforce

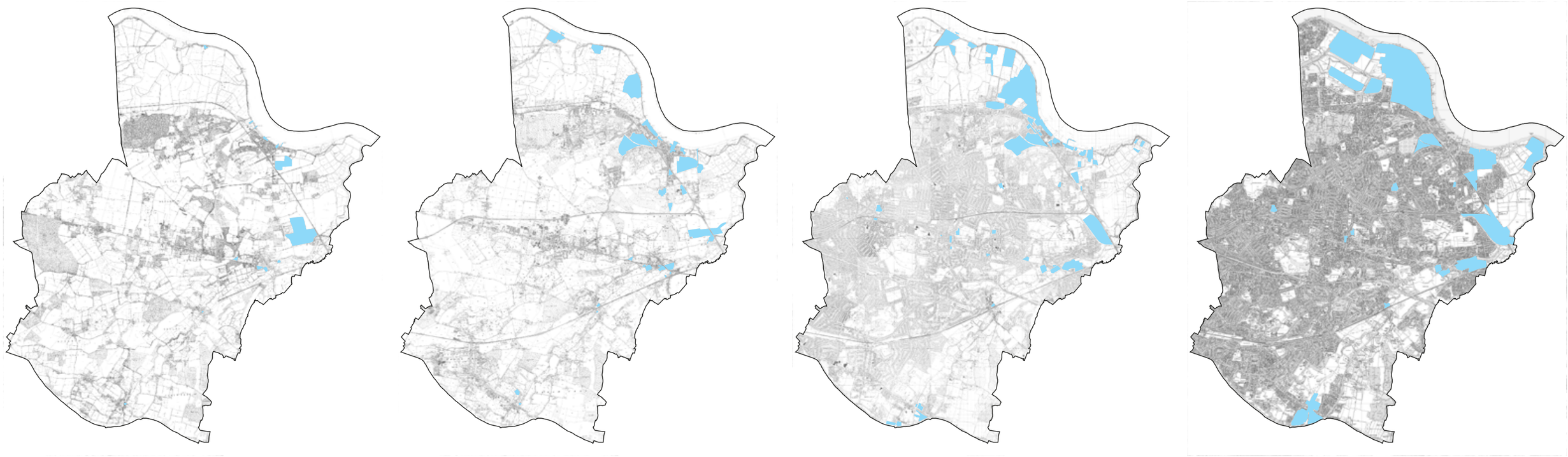
- The largest sectors in Bexley in 2015 were wholesale & transport (14.0%), construction (11.7%), administrative services (10.8%), retail (10.7%), education (10.4%), and healthcare (10.2%).
- Compared with London, Bexley is significantly over-represented in employment terms in wholesale & transport, construction, and manufacturing, while being significantly under-represented in such higher-value sectors as professional services and finance & insurance.



Total workforce by sector, 2015

Source: Experian 2015/Lichfields

Industrial Development
Historic Evolution



1870

Industrial development is dependent on access to the rivers for transportation of goods and power.

- Wharfs around Erith along the banks of the Thames.
- Large brick works along river valley between Erith and Crayford.
- Small factories and print works in Crayford.
- Mills along the river Cray at Hall Place, Bexley and Foots Cray.

1910

Development continues to be reliant on access to rivers, but the expansion of the railway system create more substantial industrial facilities.

- Munitions and engineering factories in Erith.
- Large wharfs at interchanges between rail and the river.
- Large pits for aggregates and clay linked to brick works.
- Gas works along the river Thames.
- Tannery adds to expanding print works in Crayford.
- Higher ground along Watling Road intensified agriculture through nursery gardens but remains non-industrial.

1960

Importance of rail and road infrastructure increases, and some industrial facilities related to the Thames begin to contract. Industrial sites become more consolidated and larger, whilst also spreading into residential areas.

- Expanding gas and water infrastructure along the river.
- Some wharfs in Erith contract, whilst industrial areas become contiguous around rail infrastructure.
- Clay pits contract making space for residential development in Slade Green.
- Small depot sites in residential areas.
- Large sites linked to A2 and A20 form around Thames Road and Foots Cray.

2018

Further consolidation in to large contiguous industrial areas mainly in the north of the borough. Contraction of industrial areas close to town centres.

- Large utilities facilities north of Belvedere.
- Retraction of industry around Erith to make way for residential development.
- Growth of Darrant industrial area into a dense estate.
- Expansion around rail sidings and A2/A20.

Industrial Development
Sub-Regional Context

The relationship between development and protected industrial land in the wider sub-region impacts significantly on the economy of Bexley.

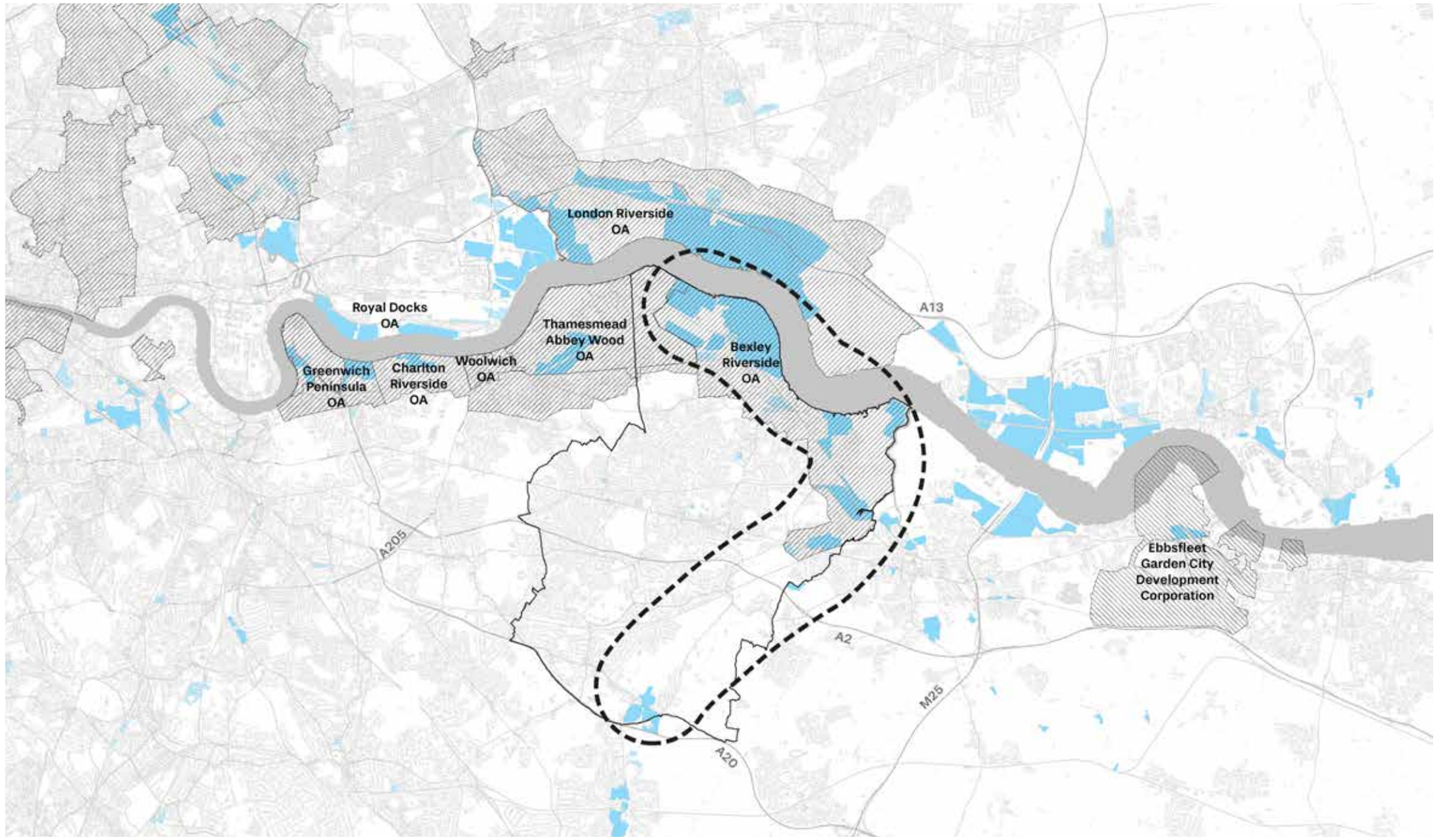
To the west, large areas of industrial land have been released for residential development, particularly in Charlton Riverside and the Greenwich Peninsula.

Together with Dartford to the east, Bexley shares a position between the routes to national ports at Tilbury, Dover and Folkstone and the London market.

Industrial development in Dartford is constrained by the borough's large areas of greenbelt.

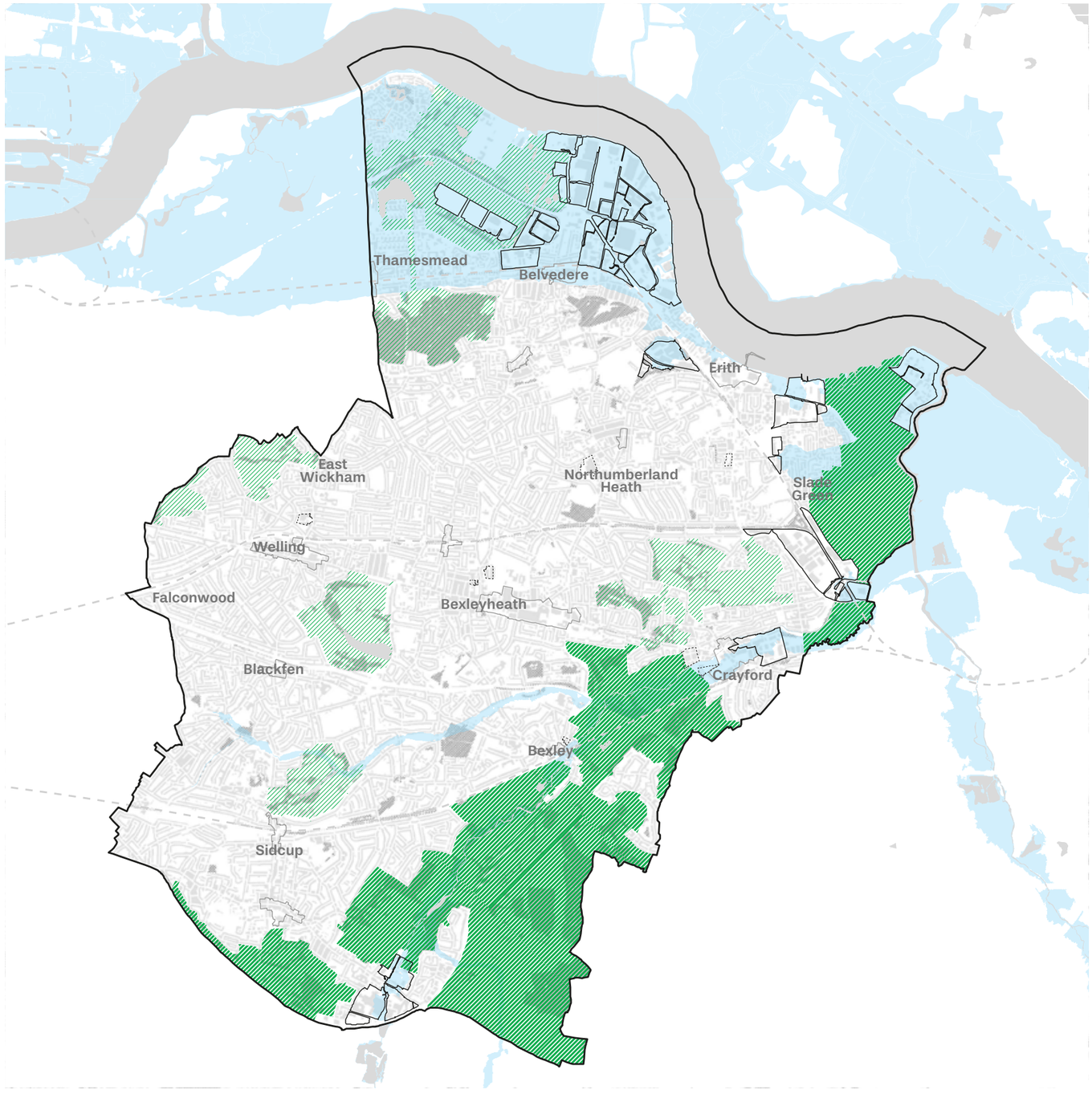
In functional economic market area terms, the Borough's closest linkages lie with its neighbours to the east and west.

In particular, there is a high degree of commercial property market interrelationship between these local authorities which means that planning policy decisions relating to provision of employment land (both what currently exists and any additional land proposed) made within any one of the local authorities potentially has a bearing on the locational and growth decisions of businesses across the sub-region and, therefore, the scale and distribution of future job growth.



Industrial Development Policy Designations

Industrial land in the borough is often located close to large areas of designated open land, such as Metropolitan Green Belt and Metropolitan Open Land (MOL). The majority of industrial land also falls within flood zones 2 and 3.



Key

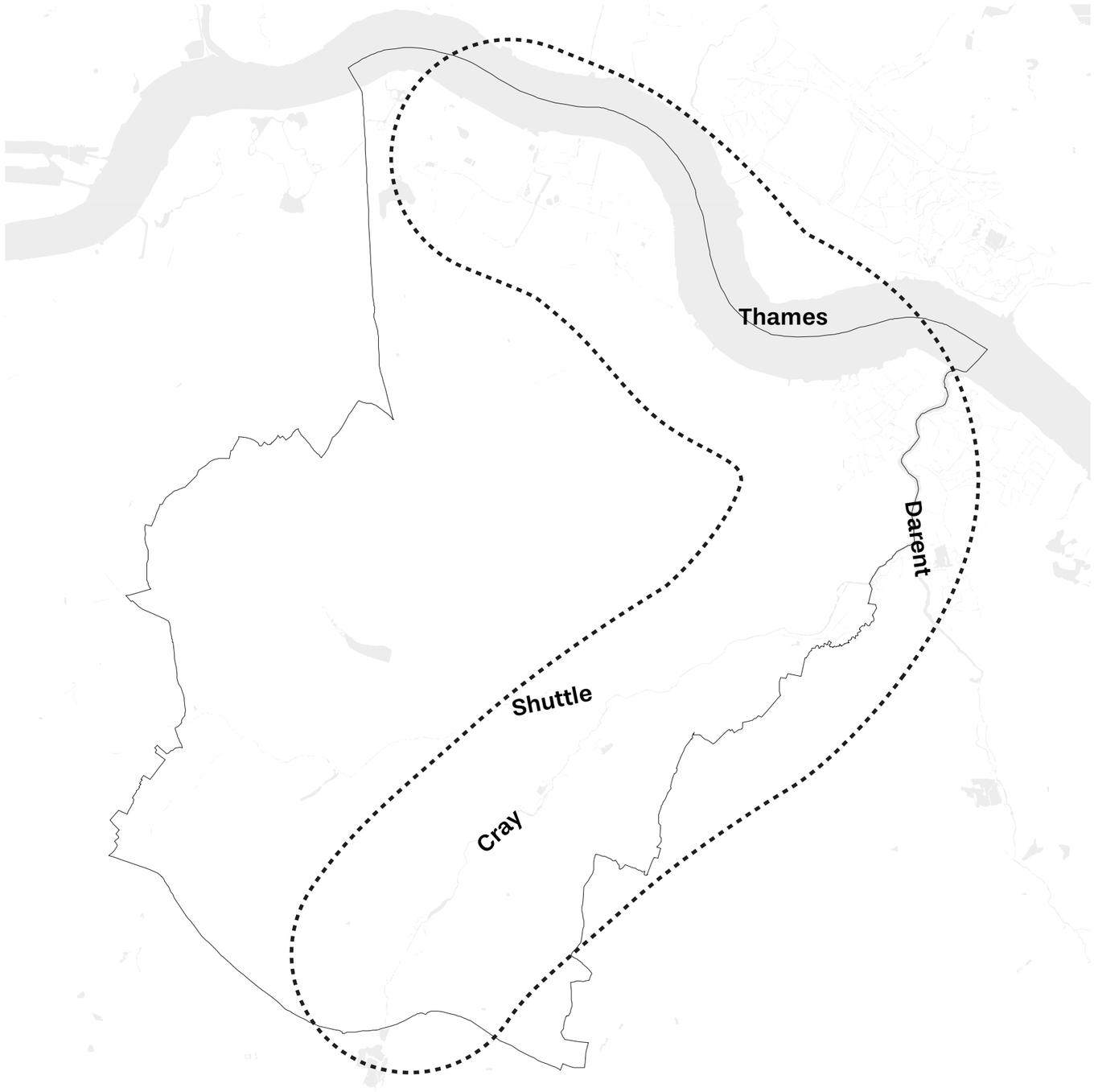
- Town centre (Draft Local Plan)
- Strategic Industrial Land
- Locally Significant Industrial Site
- Metropolitan Green Belt
- Metropolitan Open Land
- Flood Zones 2 and 3

N 0 2km

Industrial Development
Industrial Band

The historical development of industrial activities in Bexley has consolidated around a band along the north and eastern extent of the borough.

The geographical qualities of this area– at the intersection of radial routes into central London and river valleys that have historically attracted industrial uses, continue to shape industrial activity in the borough.

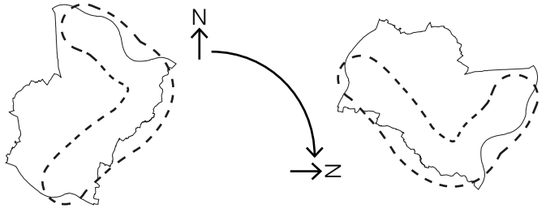


Industrial Development
Industrial Band

The diagram of the river valleys shows the infrastructure, built form and landscapes that define the industrial band along the northern and eastern extents of the borough.

Large open spaces such as Foots Cray Meadows, Hall Place and Crayford Marshes have limited the points at which this band is traversed by transport infrastructure.

The diagram has been rotated through 90 degrees to follow the form of the river valleys that define this space.

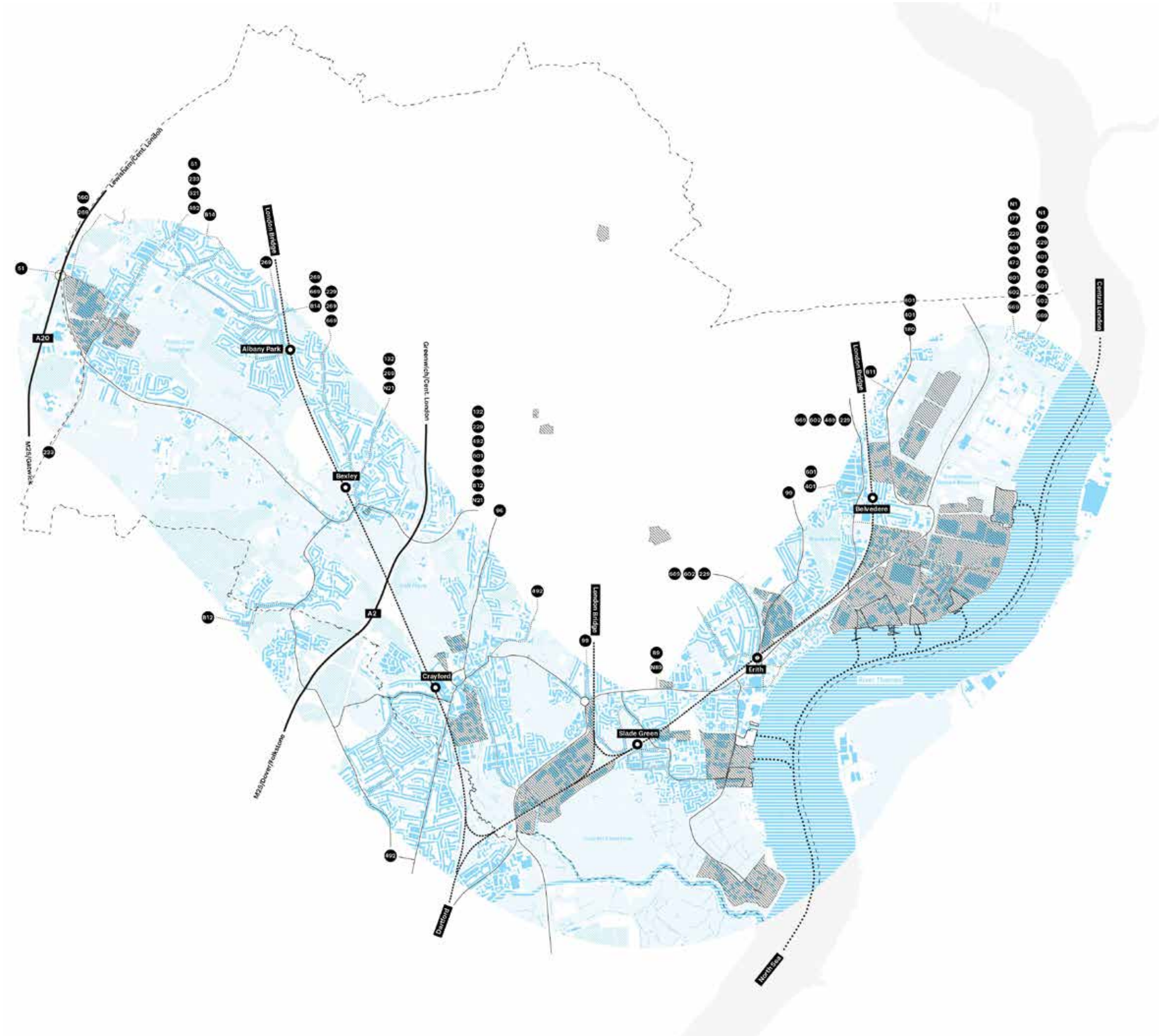


Key

- SIL or LSIS
- Major Road
- Primary Road
- Main train line
- Bus Route

0 500m 2km

N



Industrial Development

Economic Context

- Bexley sits within a wider commercial property market extending from Woolwich to Dartford.
- Within this context, Bexley acts as a secondary location to Dartford in terms of industrial uses.
- Within this context, Bexley acts as a secondary location to Bromley in terms of office uses.
- This market area is experiencing relatively limited supply and growing demand, particularly for industrial uses.
- Bexley is perceived to be a good industrial location and not a particularly good office location compared to nearby locations.
- The role and function of the borough's industrial economy has changed in recent years, with traditional, heavy industry gradually being replaced by high tech logistics and distribution, with Bexley well located to serve London and its ever growing population.

New Development

- The borough has seen moderate levels of new development in recent years, mainly providing space for industrial uses (E(g)iii/B2/B8).
- This new development is mainly delivered through a few sizeable developments.
- Much of the demand for industrial space is driven by E-commerce and Third Party Logistics providers seeking low density sites with storage, turning and parking. Distribution (B8) occupiers account for around three quarters of enquiries, with around a quarter relating to more traditional manufacturing (E(g)iii/B2) uses.

The Industrial Market

- The industrial market across the M25 area is buoyant with steady demand and speculative development is certain locations.
- Regional demand for small industrial units (<500m^2) is particularly high.
- Warehousing and distribution demand is particularly high nationally, and proximity to the M25 and Greater London increases in popularity.
- Bexley has suffered from its position between 'urban logistics' centres such as Woolwich and Charlton and M25 locations such as Dartford to the east.
- Bexley has attracted new fulfilment centres for retailers due to low land costs and availability (amongst other factors).
- Whilst the majority of demand comes from local firms, some spill over from more central locations is encouraged by lower quality, cheaper space in Bexley.
- Distribution (B8) occupiers account for around three quarters of enquiries, with around a quarter relating to more traditional manufacturing (E(g)iii/B2) uses.
- Demand for mid sized units (3,000–5,000 m^2) drives an increasing demand along the A2/A20 river corridor.
- Existing industrial floorspace vacancy is approximately 5%, one of the lowest within the wider south-east market area. This limits churn and the potential for modernisation and intensification.
- Industrial rents are low compared to similar locations.
- Commercial agents report a general shortage of readily deliverable industrial sites.

Quality of Industrial Space

- Employment sites are generally good quality, well maintained and relatively low levels of vacancy
- Within the borough, sites benefiting from proximity to key routes such as the A2/A206 corridor command the highest industrial rental values.
- Sidcup, Foots Cray and Crayford command the highest industrial rents in the borough, with Erith and Belvedere generally accommodating slightly cheaper space.
- The highest performing sites tend to be concentrated to the north of the borough, in and around the Belvedere area.
- In contrast, poorer performing sites tend to be scattered across the borough within more isolated and less established employment areas, many of which lie in close proximity to

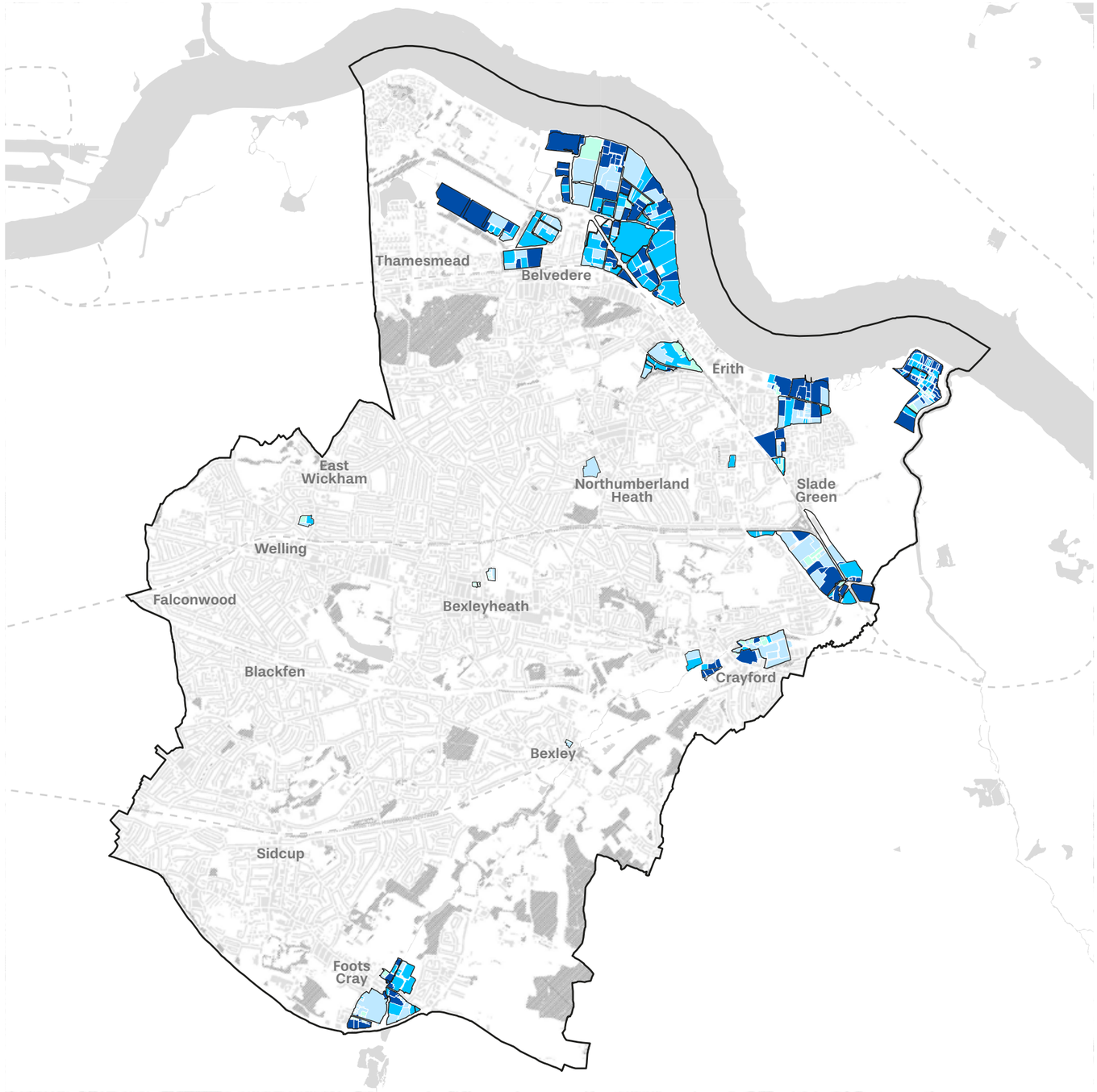
Industrial Land Audit
Plot Coverage

Relevance For Intensification

- Inefficient use of sites or large areas of non-operational space may be identified through sites with a low plot coverage.
- A high potential for an increase in built area on sites may make sites more viable.

General Pattern

- Plot coverage across industrial areas are generally low.
- Sites with very low plot coverage generally close to the river Thames in Belvedere, Erith and Crayford Ness.
- Cluster of sites with low plot coverage on eastern side of Thames Road.
- Locally significant industrial sites (LSIS) in Welling, Bexleyheath and Northumberland Heath have higher plot coverage.



Key

- 0-0.2
- 0.2-0.4
- 0.4-0.6
- 0.6 +

N 0 2km

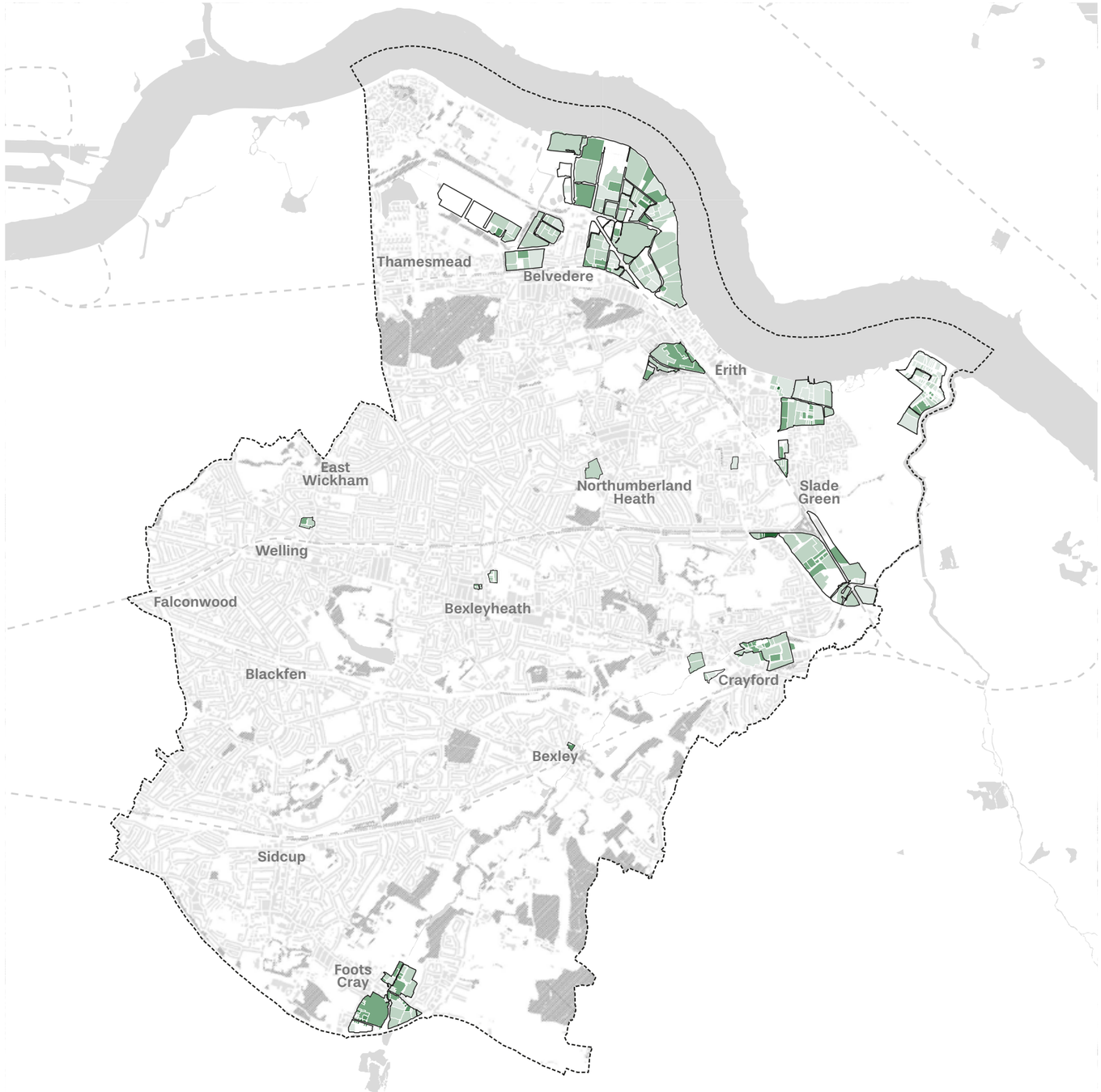
Industrial Land Audit
Floor to Area Ratio (FAR)

Relevance For Intensification

- FAR gives a more accurate impression of density than plot coverage as it takes into account multi-storey buildings.
- Areas with a low FAR may be suitable for intensification due to the potential for significant increases in floorspace on those sites.

General Pattern

- Areas along the Thames in Belvedere, Erith and Crayford Ness generally have a low FAR.
- Foots Cray and the Europa Estate have generally higher FAR.
- All areas have some sites with high FAR.



Key

- 0.0
- 0.0 - 0.24
- 0.24 - 0.48
- 0.48 - 0.72
- 0.72 - 0.96
- 0.96 - 1.19
- 1.19 +

N 0 2km

Industrial Land Audit
Business Activity

Relevance For Intensification

- Clustering of related uses may suggest connections between businesses facilitated by spatial proximity.
- Clustering reflects spatial preferences of different sectors.
- Presence of non-industrial uses signals erosion of SIL uses.

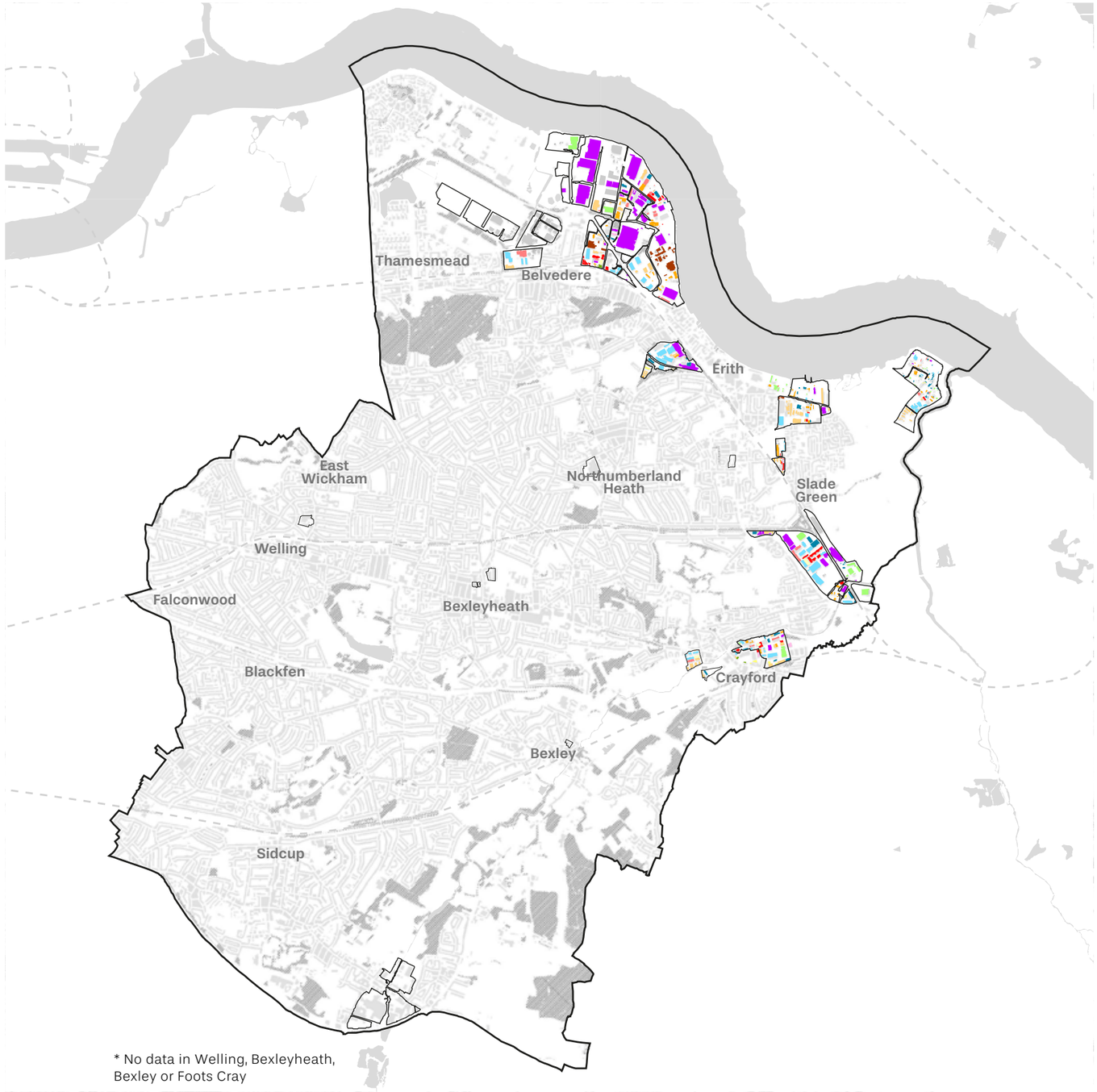
General Pattern

- Clusters of manufacturing in Belvedere, Thames Road and Crayford.
- Transport and storage generally in close proximity to strategic road network along A2/ A206 corridor in Belvedere, Europa Estate and Thames Road.
- Non industrial uses present in Crayford.

Key

- Manufacture : Metals and machinery
- Manufacture : Food, beverages and catering
- Manufacture : Other
- Printing and publishing
- Utilities
- Vehicle sale and repair
- Construction
- Wholesale
- Transport and storage
- Services
- Retail
- Restaurants, cafes, takeaways
- Arts, culture, leisure and sports
- No data

N 0 2km



* No data in Welling, Bexleyheath, Bexley or Foots Cray

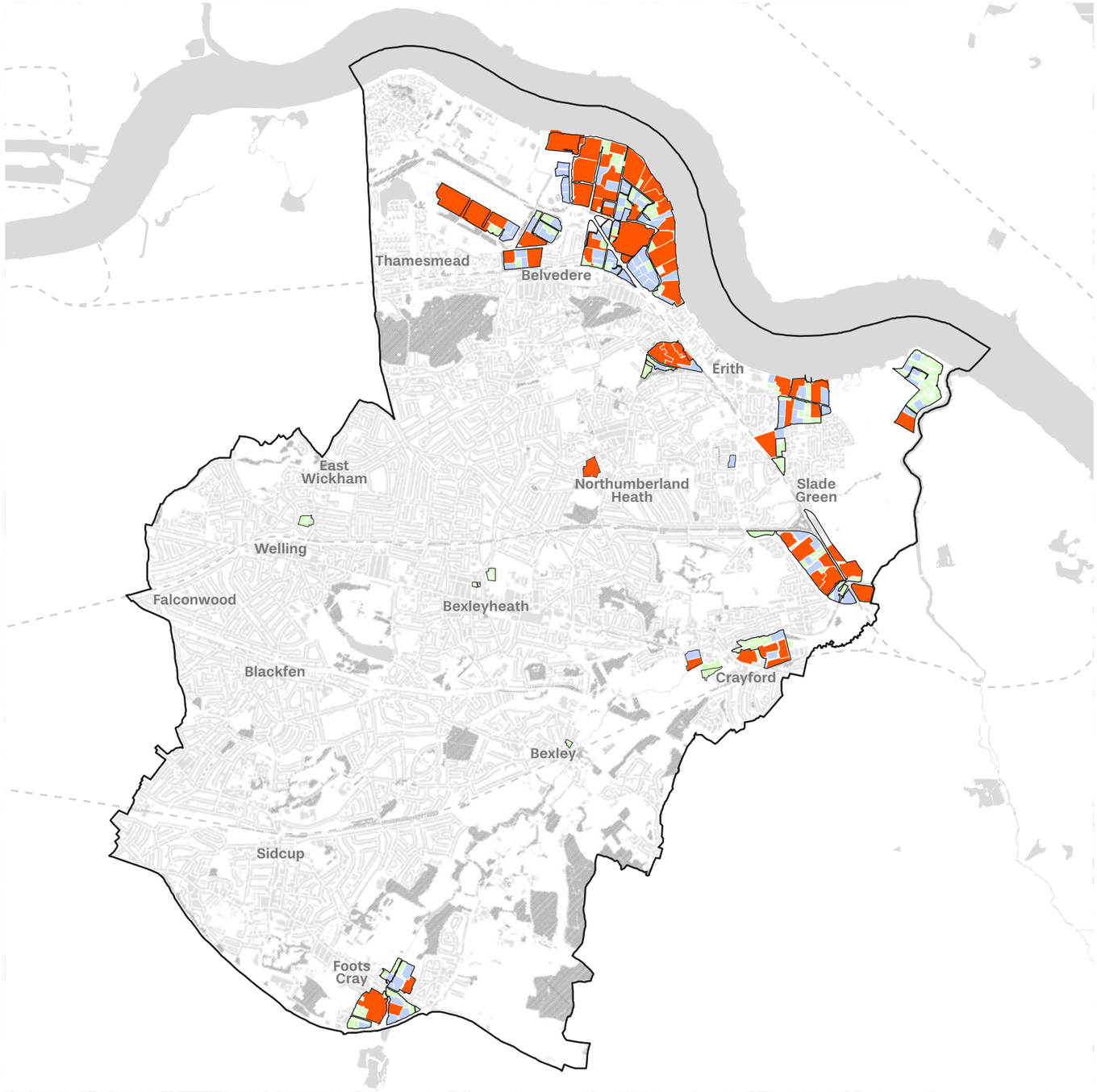
Industrial Land Audit
Site Area

Relevance For Intensification

- Larger sites have greater potential for efficient site planning.
- Larger sites enable circulation space required to offer vehicular access to upper storeys.
- Very small sites challenging to deliver B2/B8 uses on due to modern servicing requirements for these uses.

General Pattern

- Larger sites cluster in areas with good access to the A2/A20 or to the river Thames.
- Crayford Ness generally has small sites.



Key

> 0.75 Ha

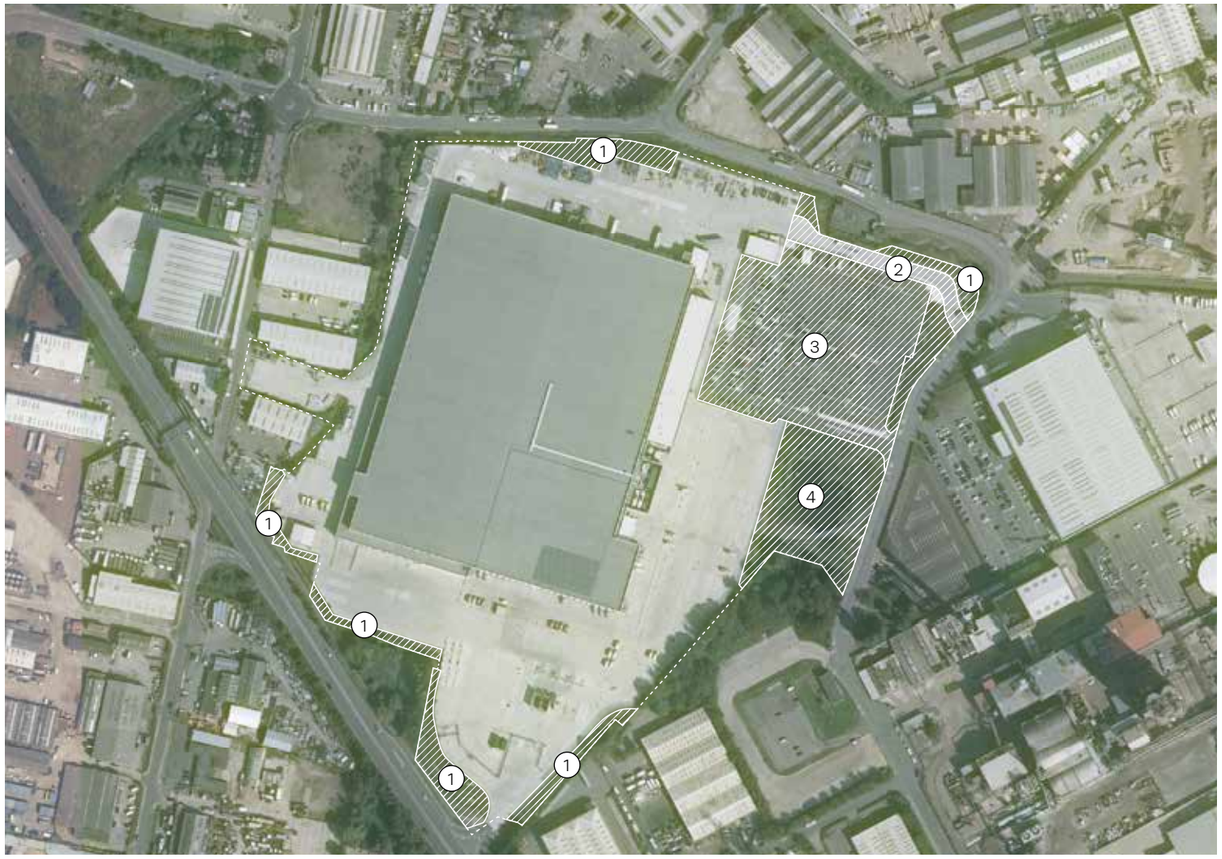
0.75 Ha – 1.75 Ha

> 1.75 Ha

N 0 2km

Industrial Land Audit
External Operational Area

Existing external operational area has been assessed on a site by site basis to establish a baseline for existing industrial capacity that incorporates both internal and external operational space. The example below illustrates the type of space that has been excluded on this large site.



Site	Ocado
Typology	Late C20th – Large
Site Area	14.35 Ha
External Operational Space	5.91 Ha

Non Operational External Space

1 Vegetation

Incidental green spaces around the periphery of the site serve no operational purpose.

2 Access Road

This additional access road is necessary due to site specific constraints rather than the operation of the employment space specifically. Access to yard is retained with operational space.

3 Employee Parking

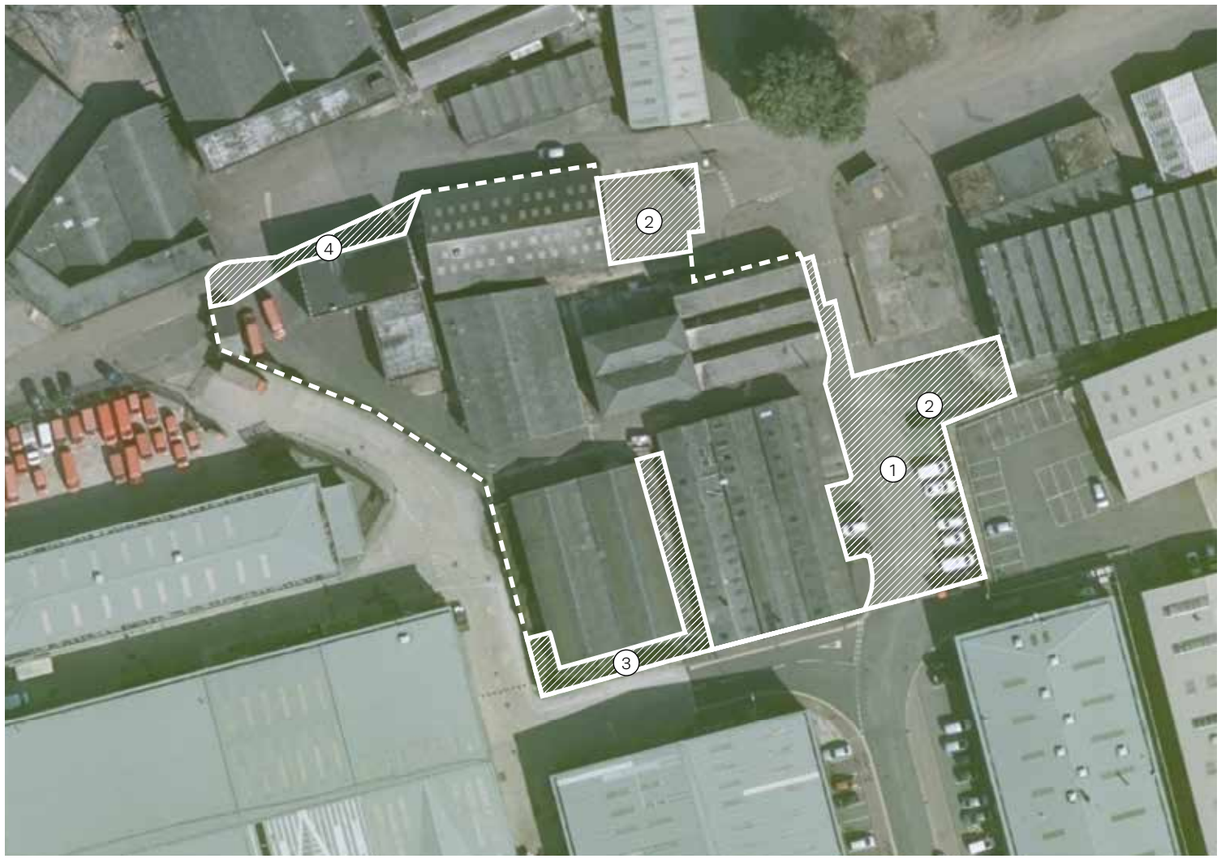
Area of employee parking is a site specific requirement and not associated with operation of employment space directly.

4 Balancing Pond

On site water management is a site specific requirement rather than a general operational requirement of this type of employment space.

Industrial Land Audit
External Operational Area

The example below shows how the same excercise has been undertaken on a smaller site of a different type.



Site	Crayford Industrial Estate
Typology	Post–1945 industrial (excluding purpose built warehouse) – small
Site Area	0.60 Ha
External Operational Space	0.13 Ha

Non Operational External Space

1 Access Road

This additional access road is necessary due to site specific constraints rather than the operation of the employment space specifically. Access to yard is retained with operational space.

2 Employee Parking

Area of employee parking is a site specific requirement and not associated with operation of employment space directly.

3 Vegetation

Incidental green spaces around the periphery of the site serve no operational purpose.

4 Incidental space

Incidental spaces around the periphery of the site serve no operational purpose.

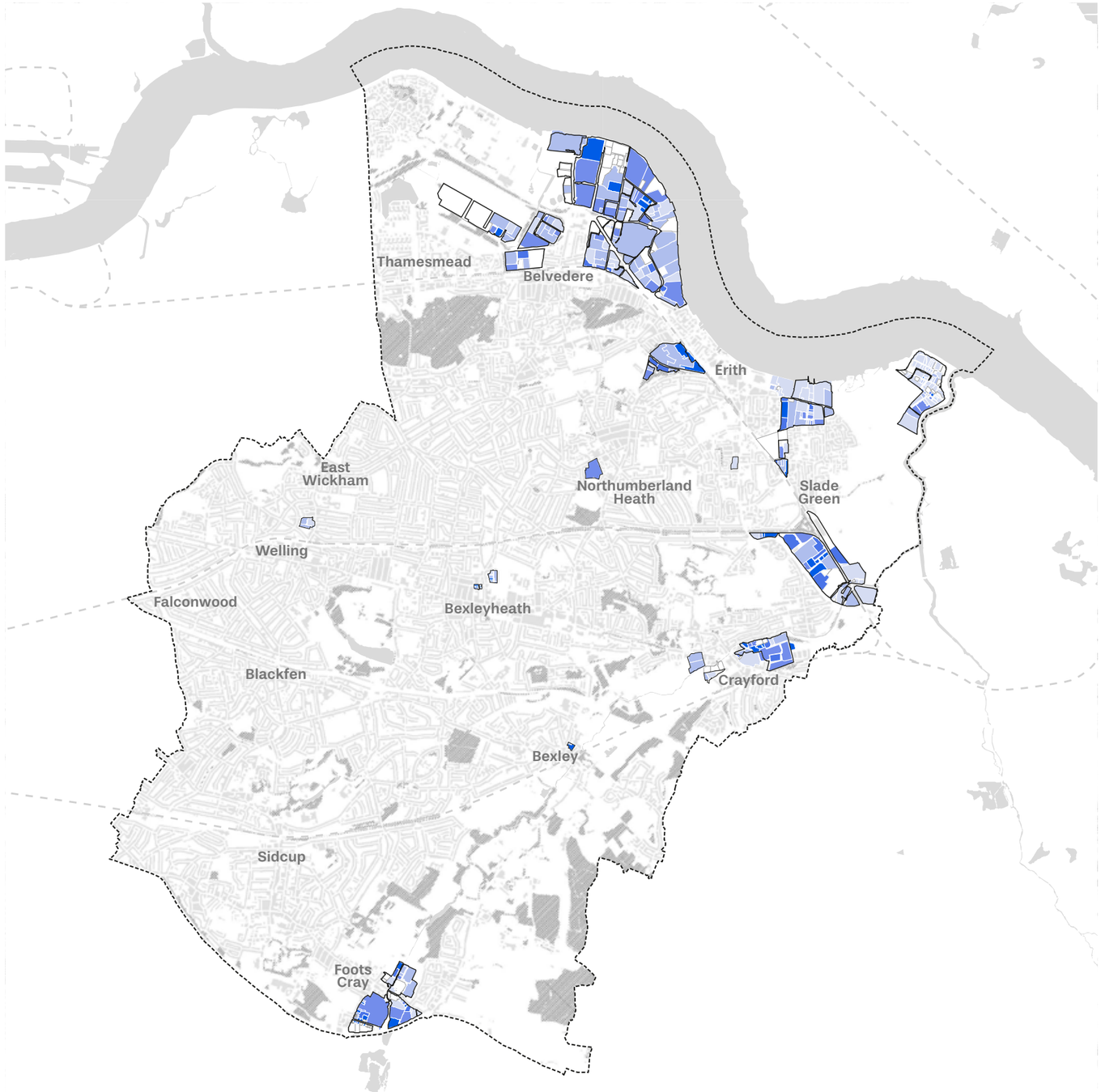
Industrial Land Audit
Operational Area Ratio (GIA : External Operational Space)

Relevance For Intensification

- Areas with a high proportion of external operational space host predominantly yard based activities.
- Whilst these areas may have low plot coverage they may still be important elements of the industrial economy through hosting yard based activities.

General Pattern

- Belvedere, Erith and Crayford Ness have large areas with a high proportion of external operational space.
- Thames Road, Crayford, Foots Cray and smaller LSIS sites near town centres are characterised by more internalised industrial activities.



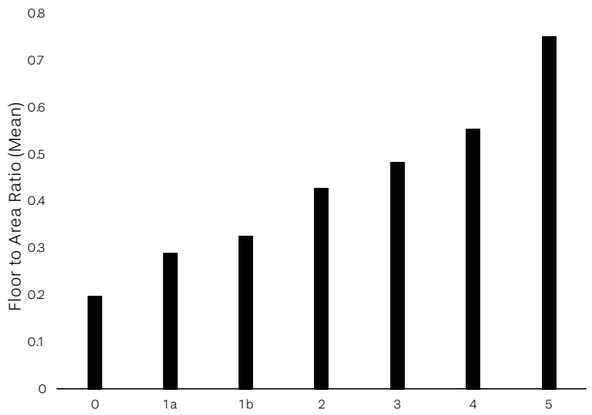
Key

- 0.0 (No buildings on site)
- 0.0 – 0.5 (Mostly external operational space)
- 0.5 – 1.0
- 1.0 – 1.5
- 1.5 – 2.0
- 2.0 + (Mostly internal operational space)

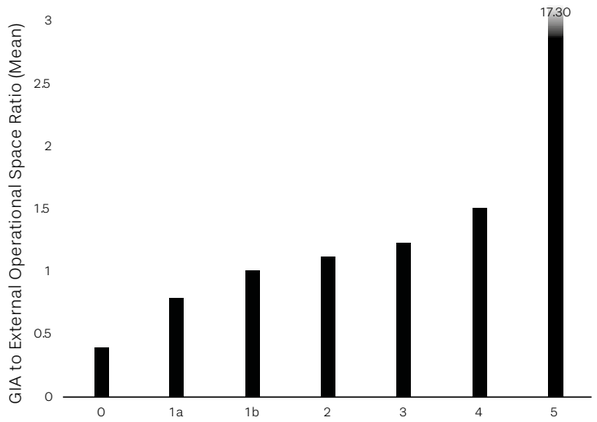
N 0 2km

Industrial Land Audit
Operational Area Ratio (GIA : External Operational Space)

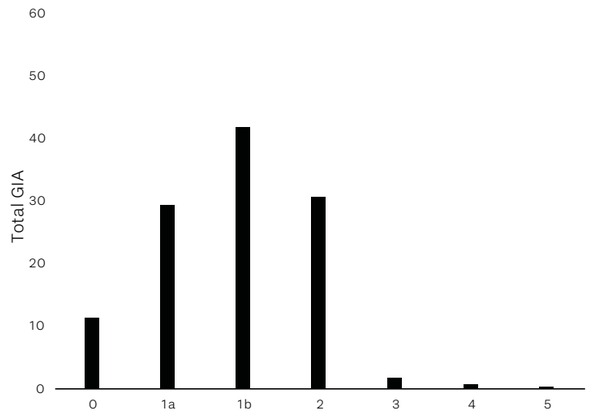
Site usage by PTAL



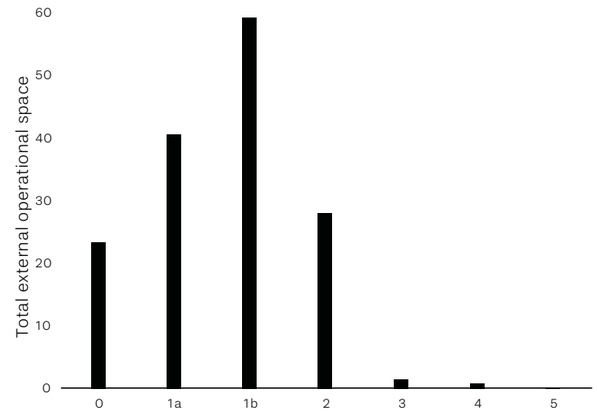
FAR increases in a linear correlation with PTAL across industrial sites.



The ratio between GIA (internal operational space) and external operational space increases with PTAL, with a significant increase in areas of a high PTAL. This is largely driven by a few sites in Bexleyheath with a very high plot coverage and minimal yard space.

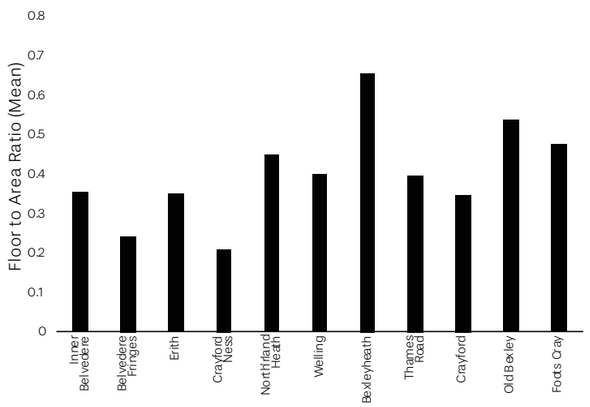


The majority of industrial floorspace is in areas with a low PTAL.

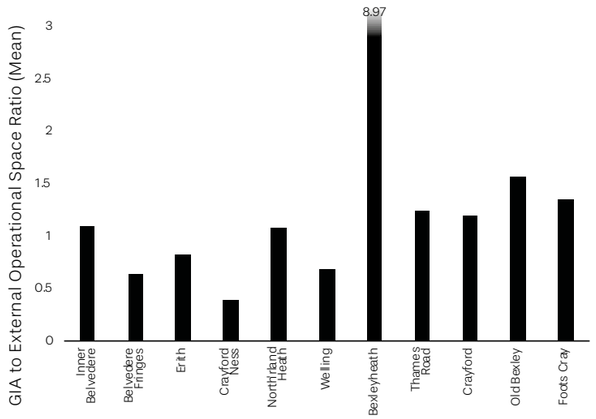


The majority of external operational space is in areas with a low PTAL, reflecting the prevalence of yard-based industrial activities in these areas.

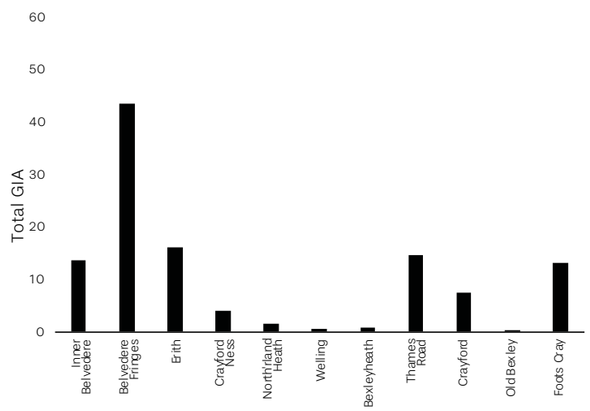
Site usage by Sub-Area



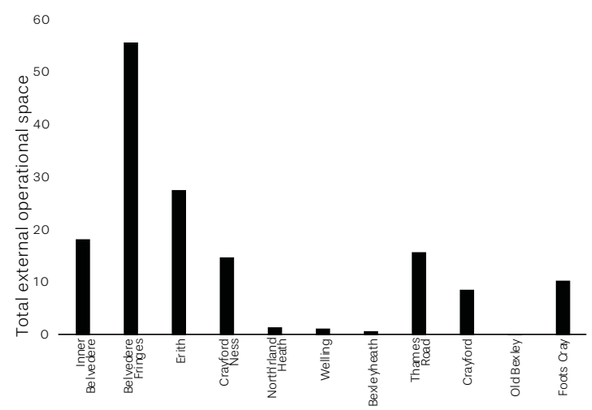
Areas along the river Thames generally have a lower FAR than other industrial areas. Sites closer to town centres such as Bexleyheath, Northumberland Heath, Bexley Village and Welling have a high FAR. Foots Cray also has a higher FAR due to the presence of office uses.



Sites tend to provide a greater proportion of external operational space in areas along the river Thames.



Belvedere Fringes provides a significant amount of industrial floorspace in the borough. Smaller industrial areas provide relatively little floorspace. Crayford Ness provides relatively little due to the prevalence of yard based activities.



Erith and Belvedere Fringes provide a significant quantum of external operational space in the borough, reflecting the prevalence of yard based activities along the river frontages.

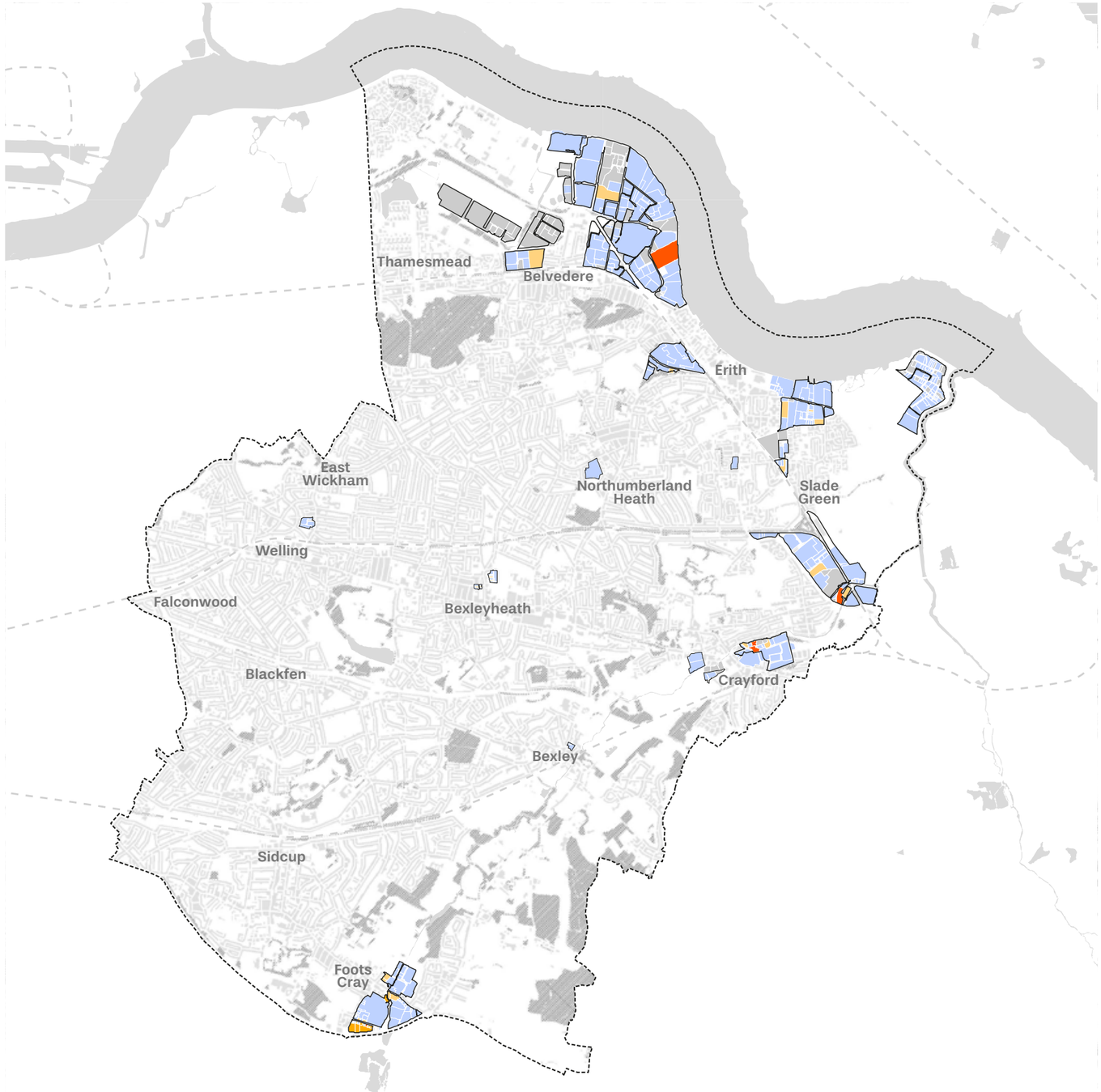
Industrial Land Audit
Site Occupancy and Vacancy

Relevance For Intensification

- Where sites contain buildings that are derelict or vacant, these sites could provide opportunities for infill development at higher densities than existing fabric.
- Where a site is wholly derelict of vacant these sites could support comprehensive redevelopment.

General Pattern

- Few derelict of vacant buildings across industrial sites.
- Where they do occur they tend to be large sites in Belvedere and Thames Road.
- Sites tend to be smaller in Crayford, but as they are adjacent sites.



Key

- No data
- Derelict building
- Occupied building
- Vacant building capable of being used

N 0 2km

Industrial Land Audit
Floorspace Requirement In the coming year

Relevance For Intensification

- Businesses that have indicated they will require an increase in floorspace may be short term opportunities for intensification.
- Businesses that have indicated a decrease may identify opportunities for the consolidation and phased redevelopment of sites.

General Pattern

- A few opportunities through increase in floor space exist in Belvedere and Erith.

Summary Of Business Interviews

Increase	Decrease	Remain
24%	2%	74%

Key

- No Data
- Increase
- Decrease
- Remain
- Unknown

N 0 2km

NB.
Data shown as points where business survey data does not correlate to building

Industrial Land Audit
Business Plans To Expand

Relevance For Intensification

- Businesses that have indicated plans to expand or relocate may be opportunities for intensification.

Summary Of Business Interviews

Expand	Relocate	Stay
22%	12%	66%

Key

- Expand
- Relocate
- Stay
- Unknown

N 0 2km

NB.
Data shown as points where business survey data does not correlate to building

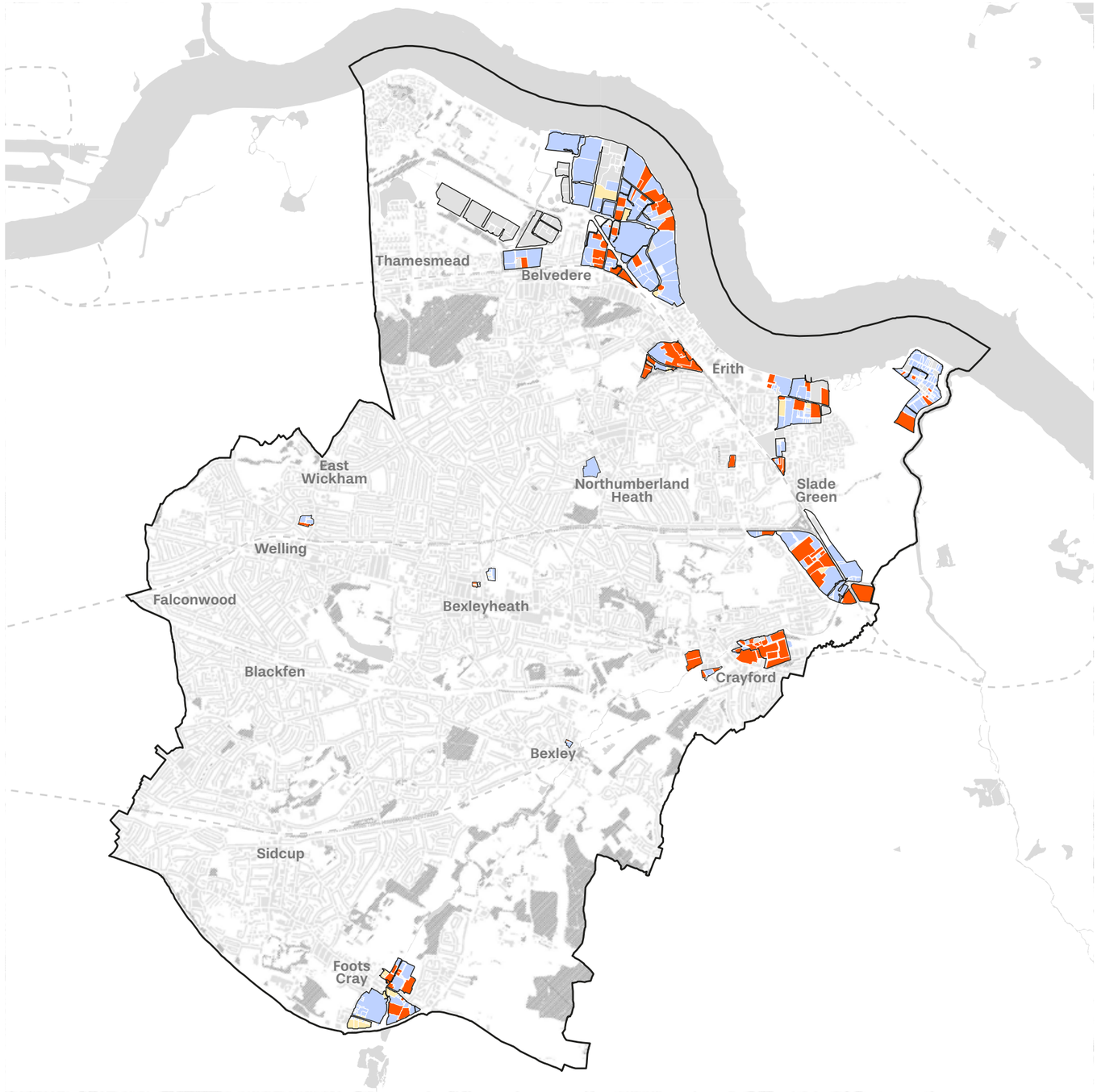
Industrial Land Audit
Multiple Occupation On Site

Relevance For Intensification

- Sites with multiple occupants may be appropriate for intensification through a phased approach that allows decant within sites and minimising disruption to businesses.

General Pattern

- Sites in multiple occupation are clustered in Crayford, Thames Road, the Europa Estate and the eastern part of Foots Cray.
- Belvedere and Crayford Ness are characterised by sites with single occupiers.



Key

- No data
- Yes
- No
- Not applicable

N 0 2km

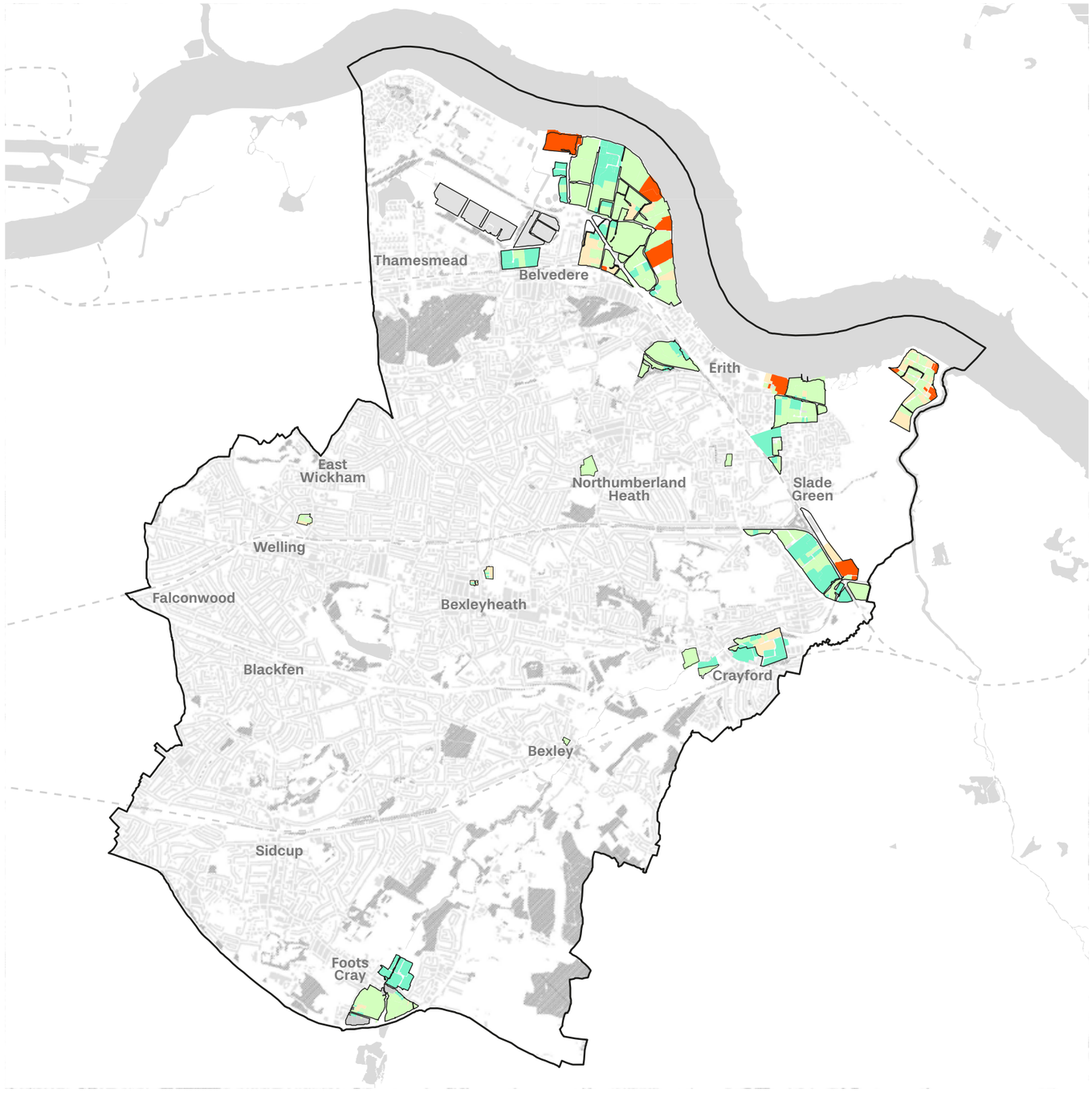
Industrial Land Audit
Environmental Impact of Industrial Activities

Relevance For Intensification

- Co-location of different types of employment space is more deliverable where environmental conditions are good, so as to ensure the space is attractive to occupiers.
- Existing activities generating a poor environment may limit the value of new employment space in these areas and therefore challenge viability.

General Pattern

- In general industrial areas have good environmental conditions, with pockets of poor conditions.
- Sites creating a poor environment cluster along infrastructure, such as in Thames Road, or along the River Thames.
- Cluster of poor environmental conditions in Crayford Ness.



Key

- High
- Medium
- Low
- None
- Not applicable

N 0 2km

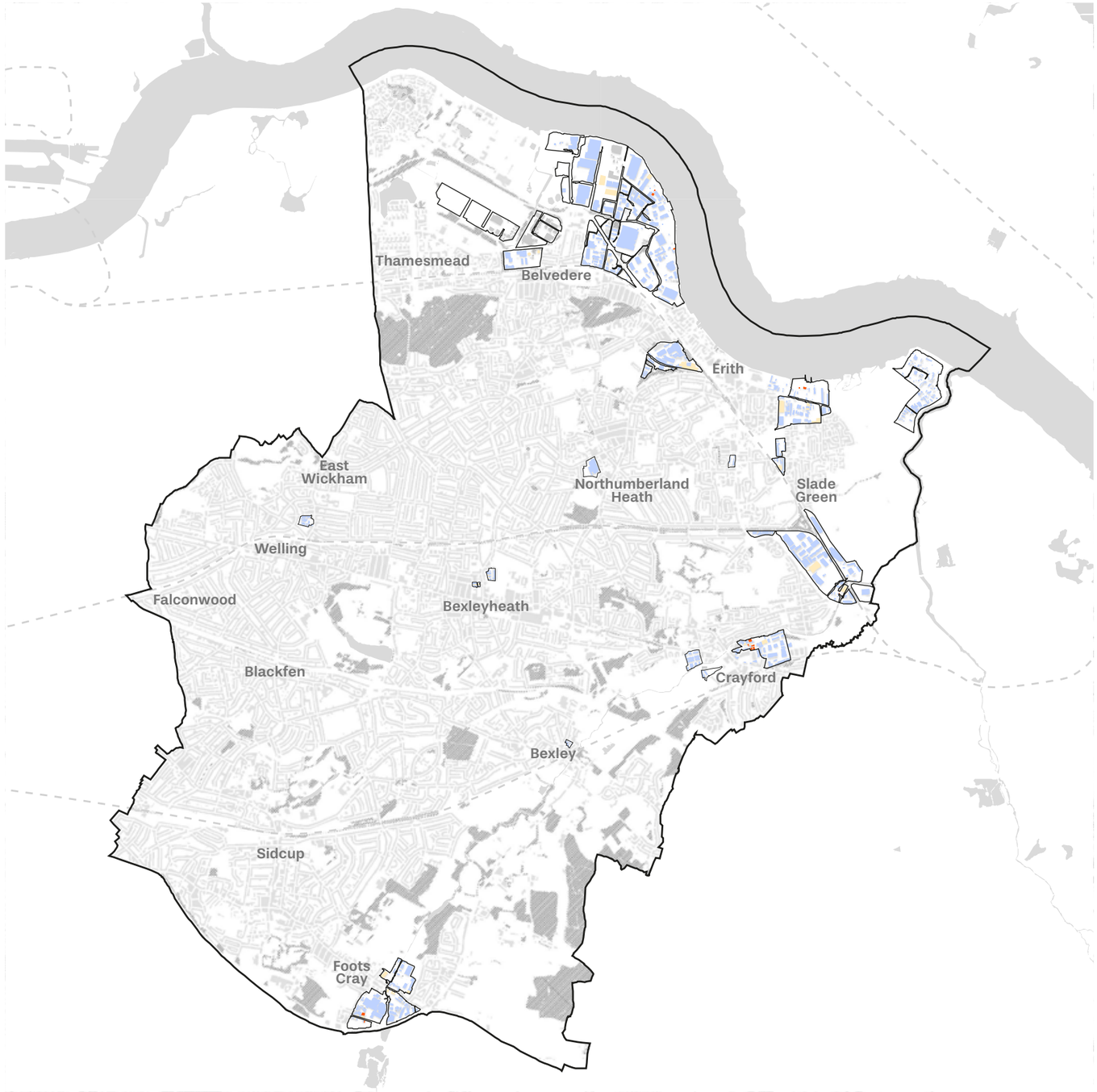
Industrial Land Audit
Building Occupancy

Relevance For Intensification

- Derelict buildings identify opportunities for intensification due to likely low existing use value.
- Sites and industrial areas that contain derelict sites may enable decant on a local basis to minimise disruption to businesses through a phased approach.

General Pattern

- Levels of vacancy are very low.
- Some vacant buildings in Crayford. These buildings are adjacent within a single site so could enable comprehensive redevelopment.



Key

- No data
- Derelict building
- Occupied building
- Vacant building capable of being used

N 0 2km

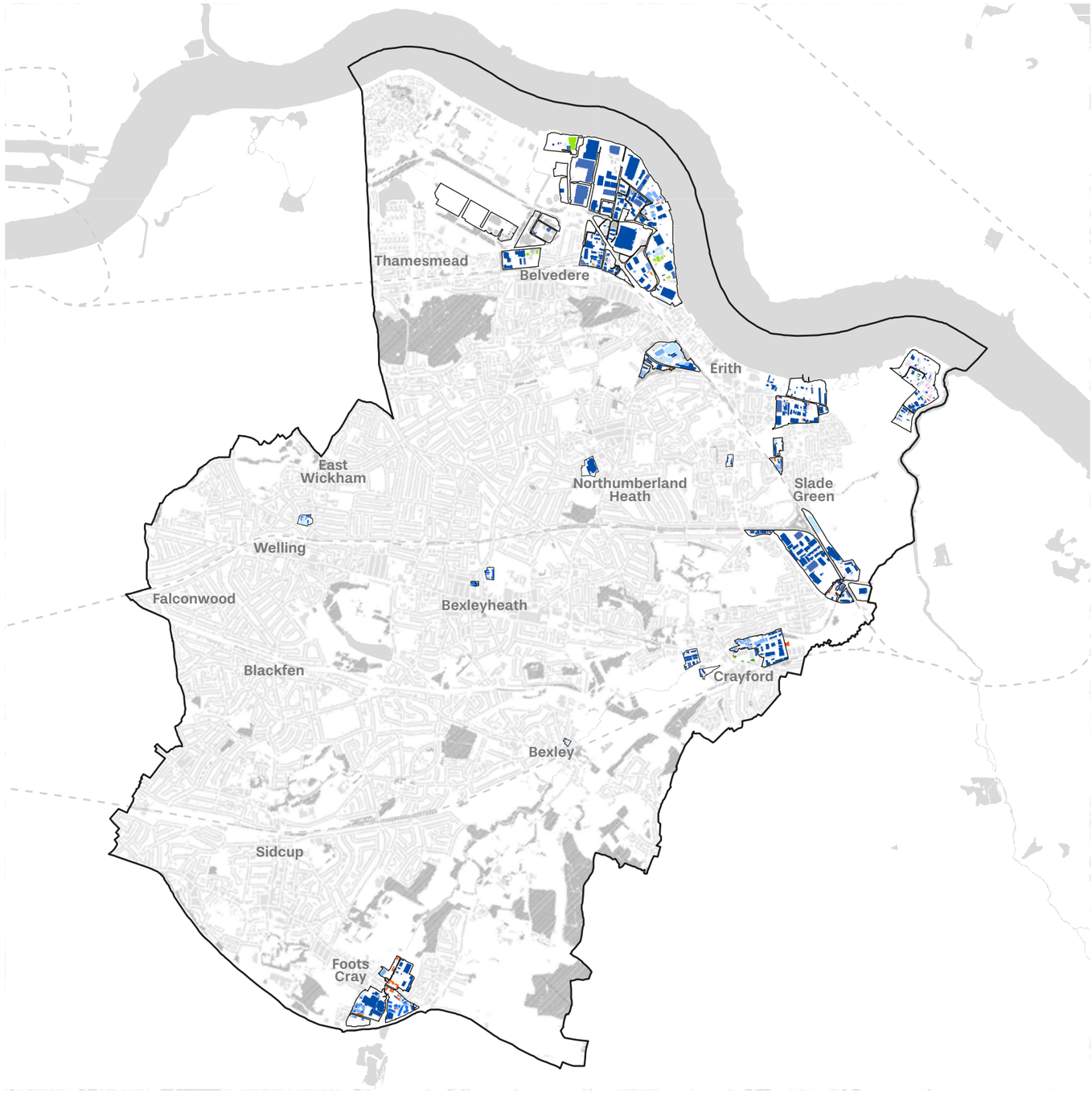
Industrial Land Audit
Building Types/Age

Relevance For Intensification

- Older building stock may correlate to low existing use value and hence identify areas where development may be more viable.
- Older building stock that has heritage value is suitable for refurbishment and can attract new sectors into industrial areas.
- Areas containing existing worker amenities such as retail can be attractive to occupiers.
- Specialised heavy industrial hardware is difficult to relocate.

General Pattern

- Specialised industrial hardware located close to river Thames.
- Large areas of pre-1945 building stock in Europa Estate and Crayford.
- Modern industrial buildings in Belvedere and Thames Road, areas with good connections onto the strategic road network.



Key

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

N 0 2km

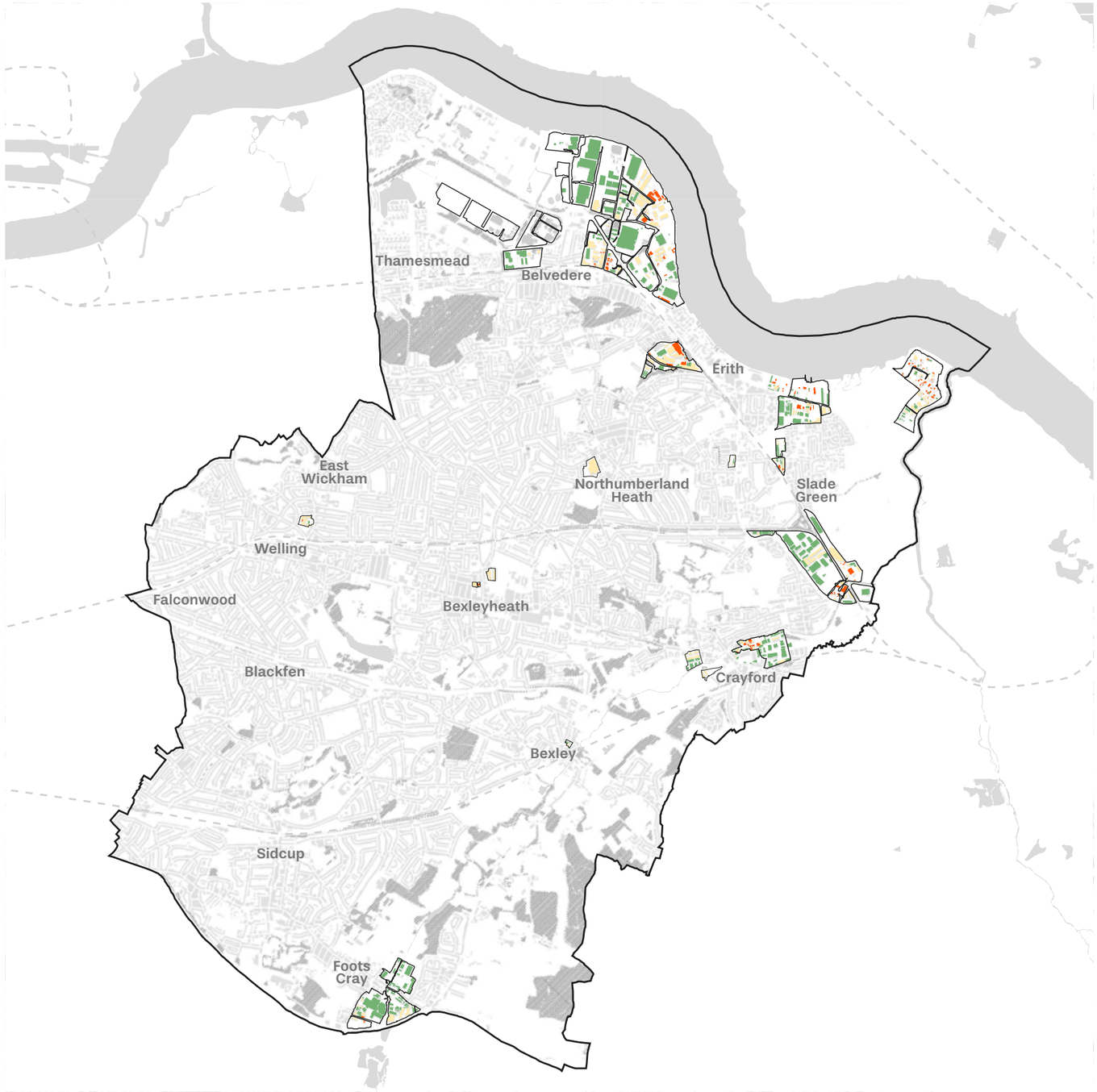
Industrial Land Audit
Condition of Floorspace

Relevance For Intensification

- Buildings in poor condition identify opportunities for intensification due to likely low existing use value.

General Pattern

- Poor quality building stock tends to create large clusters.
- Areas of Europa Estate, Erith and Crayford Ness are poor quality.



Key

- Good
- Average
- Poor
- Not applicable

N 0 2km

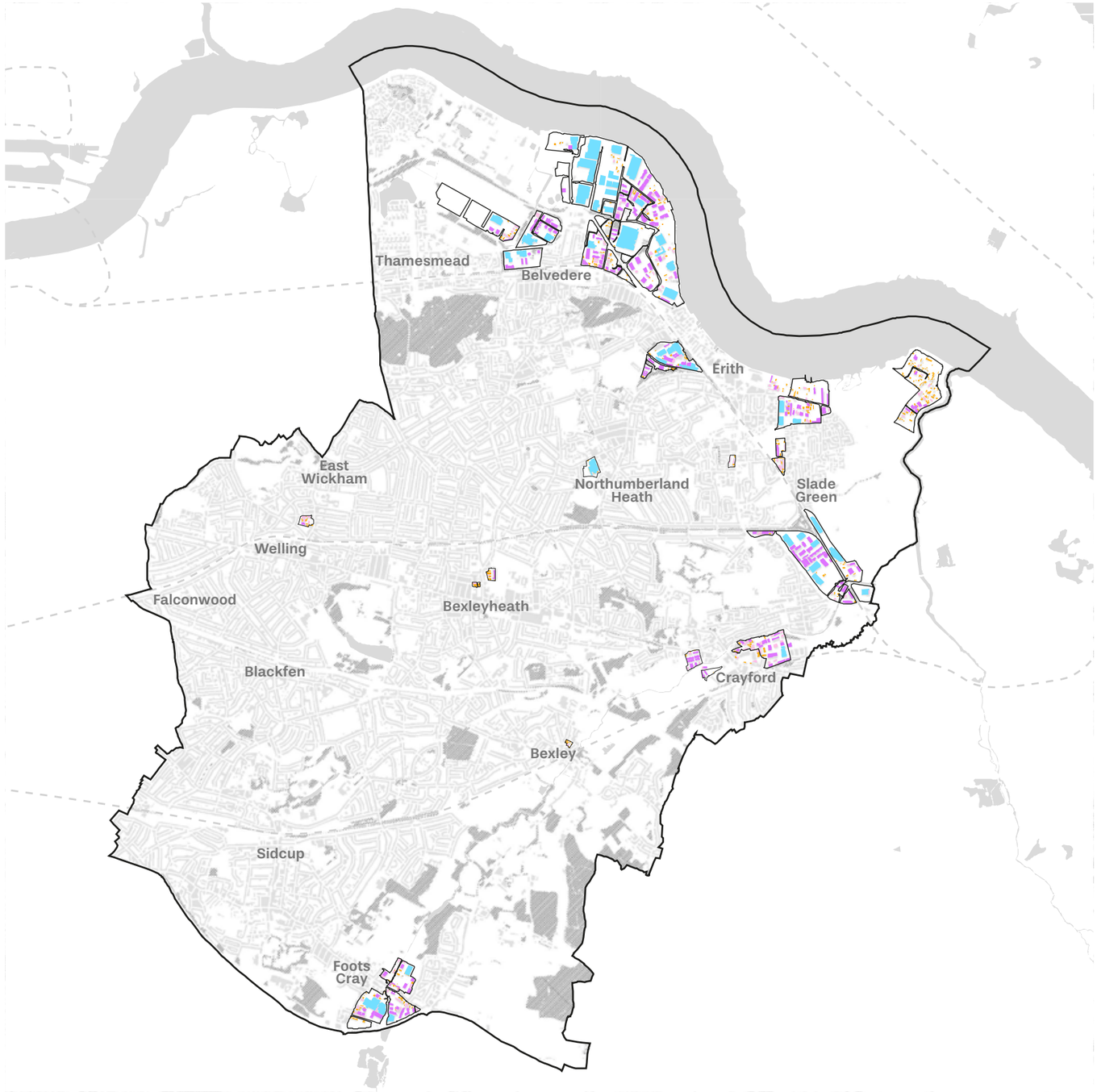
Industrial Land Audit
Industrial Typology

Relevance For Intensification

- Sites with large industrial typologies may enable infill development, particularly on irregularly shaped sites.

General Pattern

- Large industrial types are clustered along the A206/Bronze Age Way corridor.
- Locally significant industrial sites in Welling and Bexleyheath and Crayford Ness SIL generally provide smaller workspace typologies.



Key

- Workshops (20–500 sqm)
- Small Industrial (500–1,000 sqm)
- Medium Industrial (1,000–5,000 sqm)
- Large industrial (5,000 sqm +)

N 0 2km

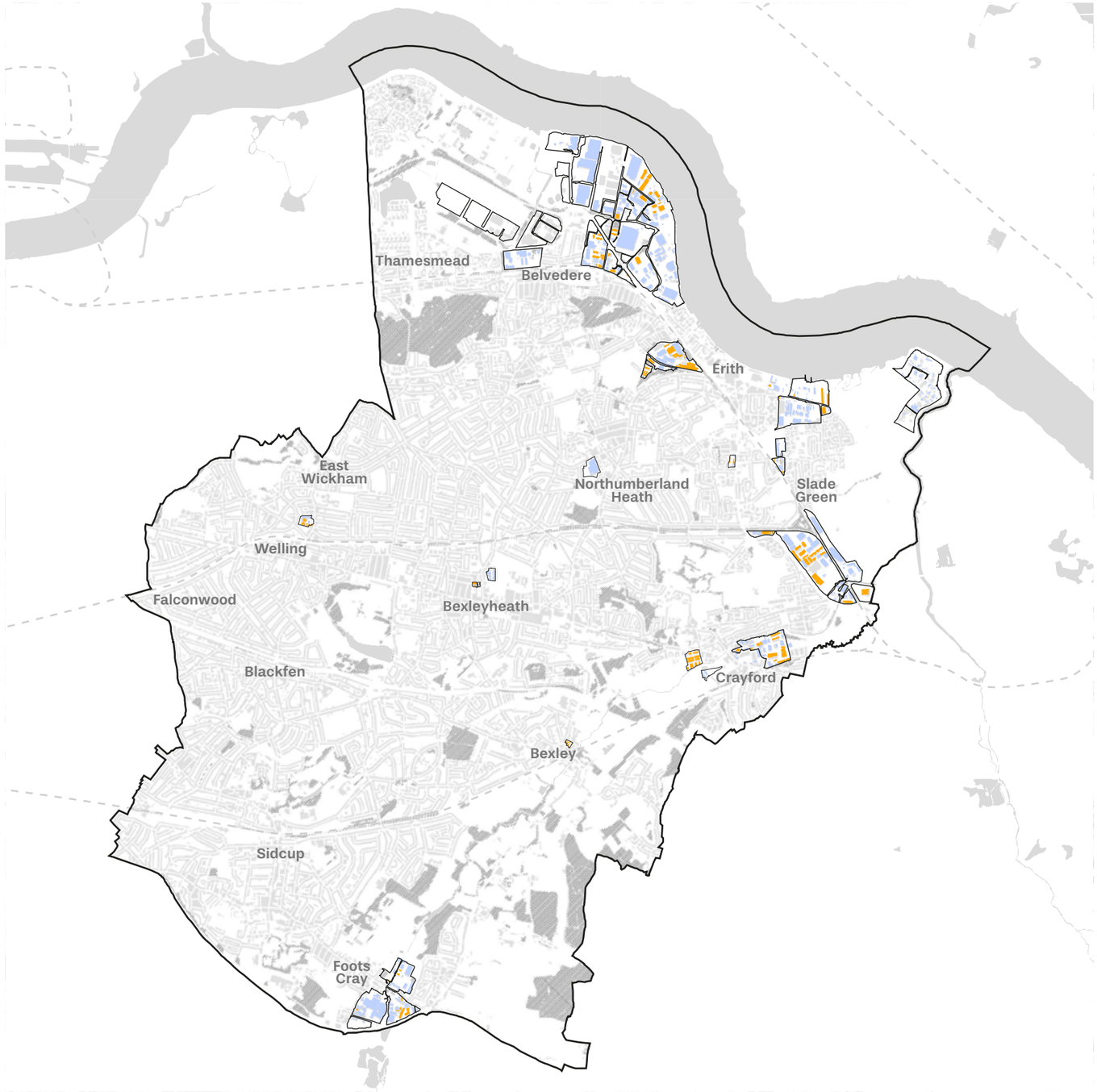
Industrial Land Audit
Buildings With Multiple Businesses

Relevance For Intensification

- May identify sites with a high density of employment.
- Buildings in multiple occupation may be challenging to redevelop due to multiple leases.

General Pattern

- Buildings in multiple ownership generally have a smaller building footprint.
- Clusters of multiple ownership in Crayford, Thames Road, Europa Estate and LSIS in Welling and Bexleyheath.



Key

- Only business in the building
- Unit shared by multiple businesses
- No data

N 0 2km

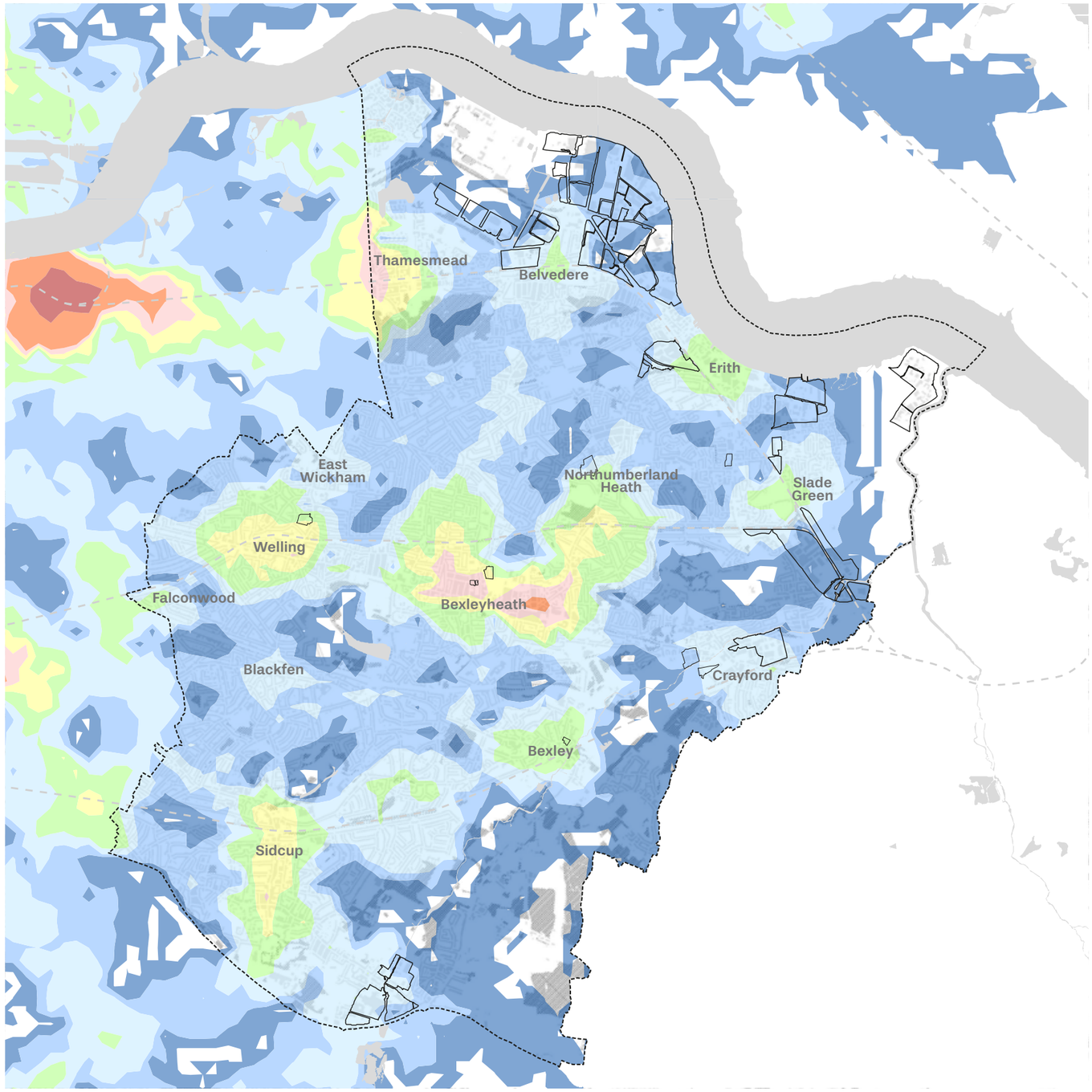
Industrial Land Audit
PTAL (2021 Forecast)

Relevance For Intensification

- Good public transport accessibility enables higher density employment uses.
- More efficient typologies of development are possible in areas of good transport accessibilty due to reduced land take for employee and customer parking provision
- Incorporation of high numbers of parking spaces may challenge viability.

General Pattern

- Larger areas of contiguous industrial land generally has poor public transport accessibility.
- Some SIL and LSIS fall in areas of average transport accessibility, particularly around Belvedere, Erith and Slade Green.
- Smaller areas of LSIS have good transport accessibility, such as Welling and Bexleyheath.



Key

0	4
1a	5
1b	6a
2	6b
3	

N 0 2km

Spatial Opportunities
Connectivity

Area A – Thamesmead
Reduce severance and improve junctions, specifically along Eastern way, Manorway, Yarnton Way; improve connections to cycle routes, integrate Veridion Park, extend DLR

Area B – Belvedere
Potential new transport interchange on extended DLR and Crossrail line, segregated public transport (PT) corridor, safeguard new river crossing, improve road junctions

Area C – Erith
Segregated PT route, junction improvements to overcome severance

Area D – Slade Green
Segregated PT route, redesign junctions to reduce severance and congestion, potential relief road to redirect heavy traffic away from Manor Road

Area E – Crayford
Connections and junctions enhancement

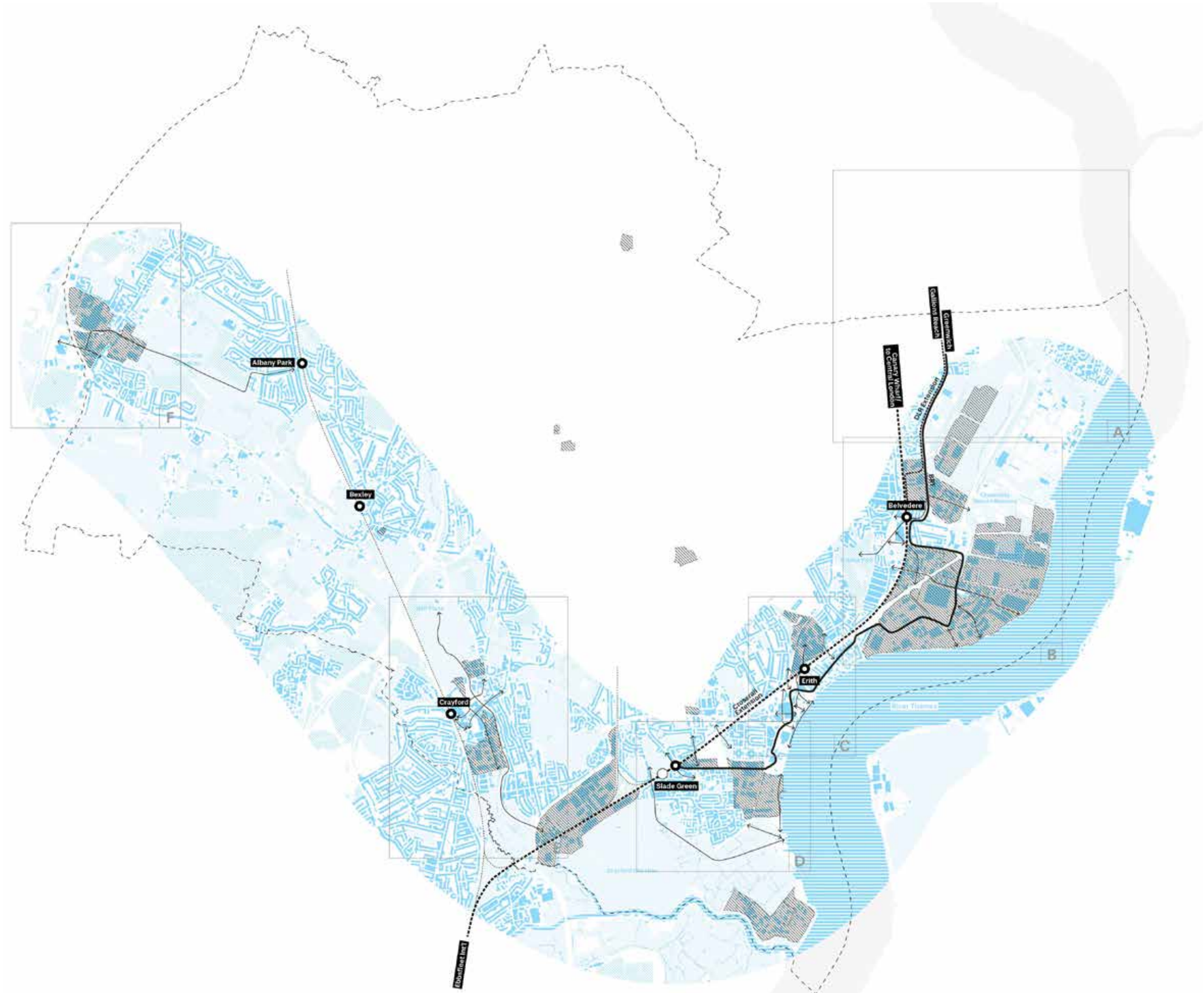
Area F – Foots Cray
North–south connections and junctions enhanced, improve relationship to the river

Key

- SIL or LSIS
- Bus Rapid Transit route
- Crossrail to Ebbsfleet Extension
- DLR Extension
- New or improved route

0 500m 2km

N



Spatial Opportunities
Uses

Area A – Thamesmead
New local centre (Abbey Wood Village) around station

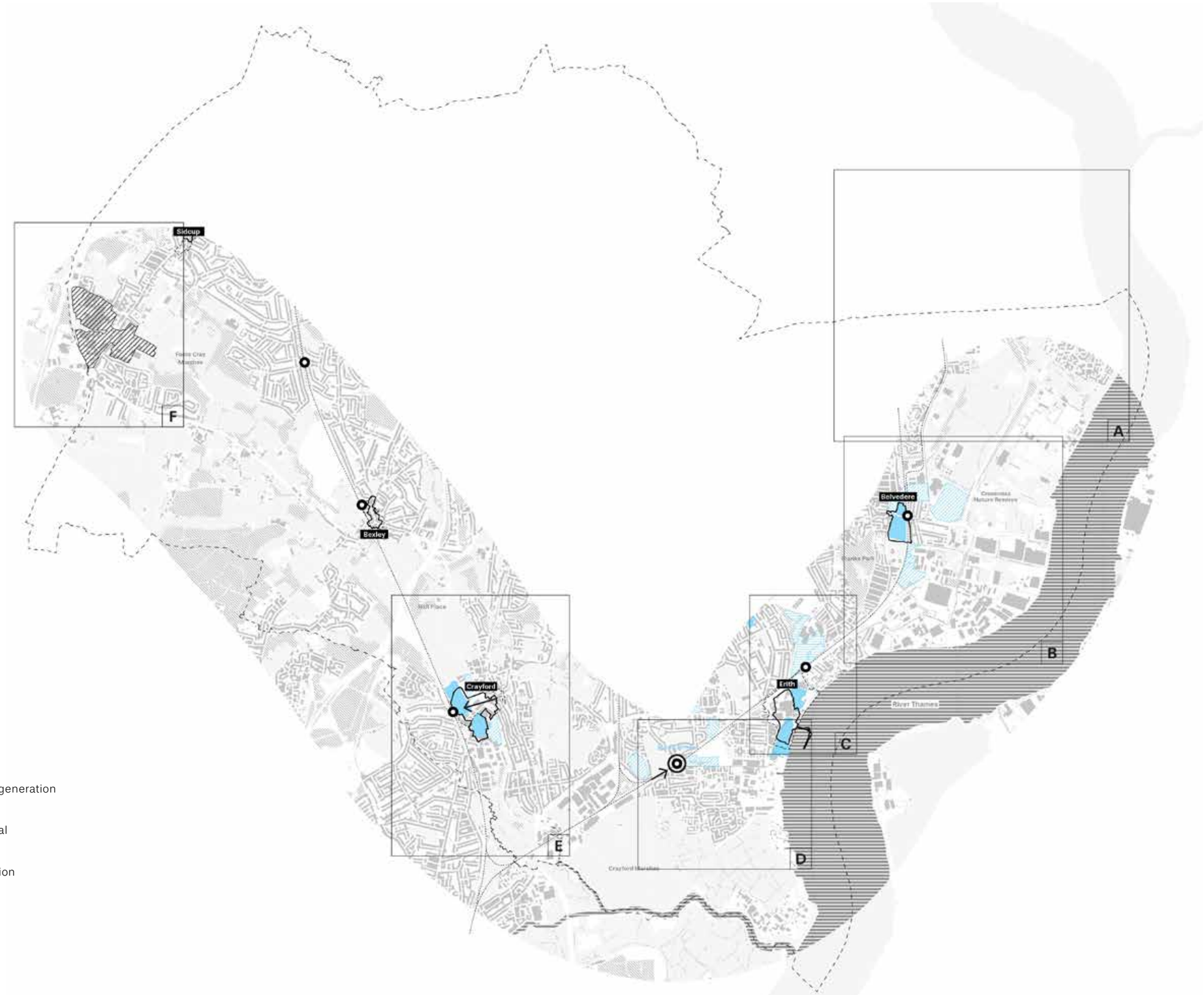
Area B – Belvedere
New district centre (Lower Belvedere) to the south of the station with a small release of SIL for primarily residential uses

Area C – Erith
Potential to increase mix of uses on LSIS south of the station

Area D – Slade Green
Intensify industry to the north along Manor Road, transition between new and existing residential areas by replacing SIL with LSIS

Area E – Crayford
New town centre boundary includes retail parks where more urban conditions will be created; redevelop underused and poor quality industrial sites (some for residential use and some for industrial use) and improve the area's relationship with the River Cray.

Area F – Foots Cray
Rationalise, modernise and intensify employment area



Key

- Proposed Town centre boundary (Draft Local Plan)
- Current town centre boundary
- Mixed use intensification
- Potential estate regeneration
- Potential residential
- Potential Co-location

Spatial Opportunities
Green and Blue Infrastructure

Area A – Thamesmead
Strengthen key open spaces, improve accessibility of open spaces along Yarnton Way

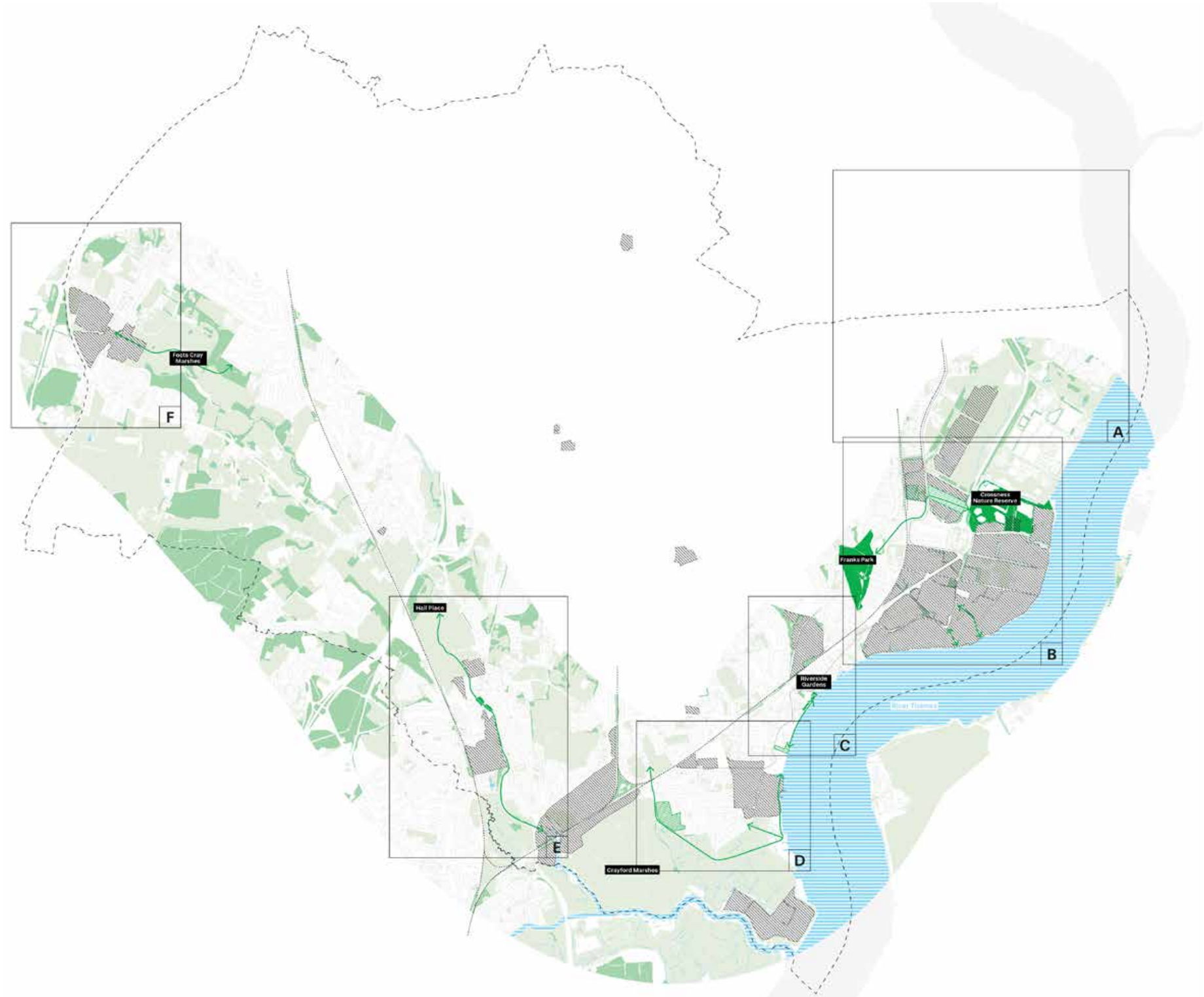
Area B – Belvedere
New park to link existing green spaces, particularly Frank's Park and Crossness Nature Reserve.

Area C – Erith
Links connect open spaces along Thames path and creation of new green space east of Morrisons

Area D – Slade Green
Enhance access to existing green spaces around Slade Green including Crayford Marshes

Area E – Crayford
Increase connectivity along River Cray linking to larger green spaces

Area F – Foots Cray
Improve connectivity to Foots Cray Meadows from the south



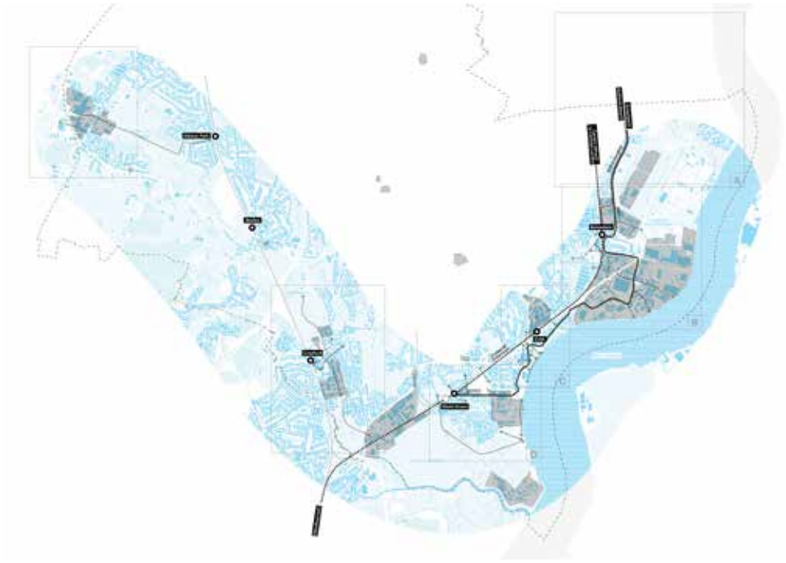
Key

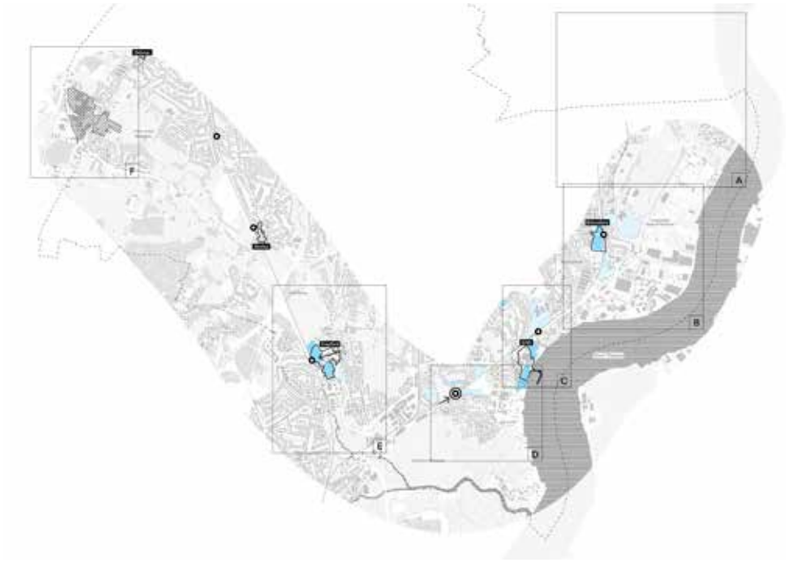
- SIL or LSIS
- Integrated green spaces
- New green spaces
- New or improved green link

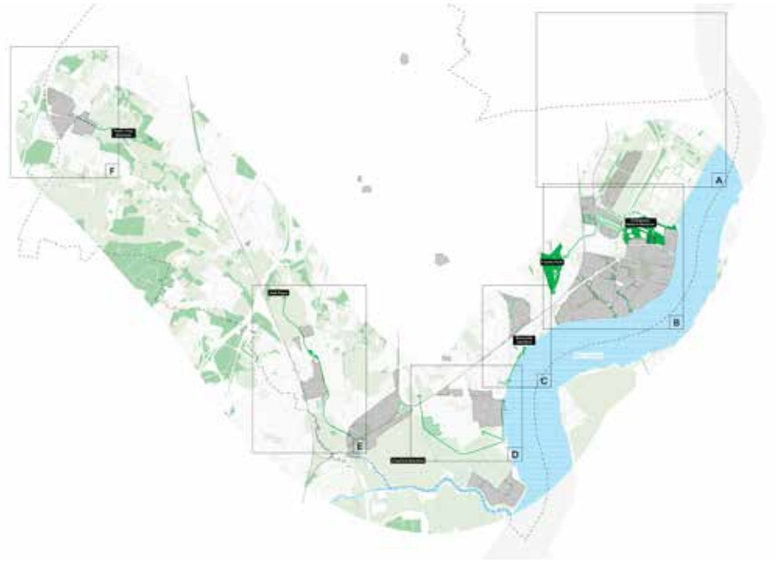
0 500m 2km

N

Spatial Opportunities
Implications For Industrial Land







Key Findings – Connectivity

- Existing industrial areas are directly adjacent to stations with potential for significant improvements in connectivity to the wider sub-region.
- Areas currently designated as SIL will play an important role in ensuring stations connect into wider residential hinterlands.
- Key areas of severance are caused in part by the location of large industrial areas, particularly along Bronze Age Way.
- Industrial areas will play an important role in maximising the benefit of a potential bus rapid transit (BRT) route.

Key Findings – Uses

- Some sites may be critical to unlocking significant residential and mixed use development in sustainable locations currently designated as SIL or LSIS.
- Managing the transition between industrial and residential uses may utilise co-location to ensure development integrates with existing residential areas.

Key Findings – Green and Blue Infrastructure

- Industrial areas will play an important role in improving the quality of connections between town centres, residential areas and natural spaces such as the Thames Path, Erith Marshes and Crayford Marshes.
- Belevedere Industrial areas can ensure the creation of a new high density town centre has access to large natural spaces such as the River Thames and Erith Marshes.

Spatial Preferences
Existing Sectors

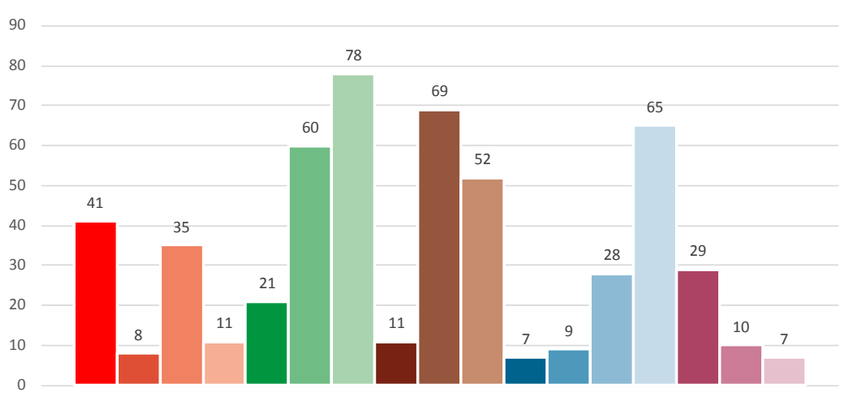
The Industrial Land Audit identifies the largest sectors within the borough's industrial areas. Given their importance to the economy of the borough, the following pages describe the spatial tendencies that are particular to each sector.

In addition to spatial patterns that are legible at the borough scale, the summaries of each sector include business survey responses that identify locational advantages identified by businesses.

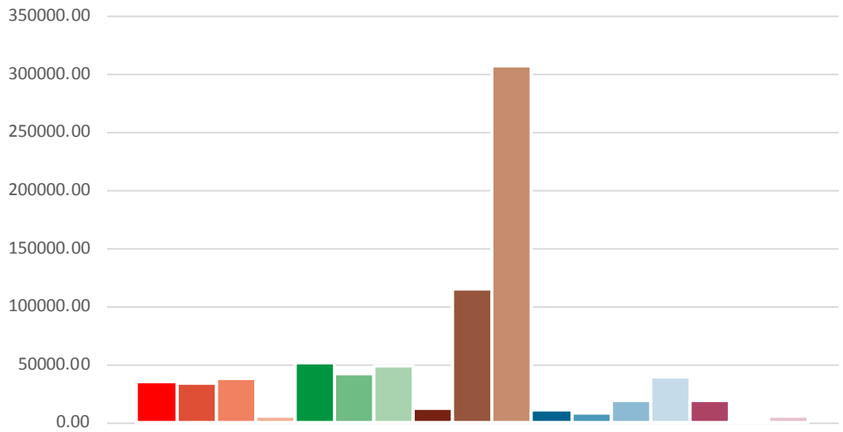
The largest sectors by number of businesses and by total employment numbers have been included:

- Transport and Storage
- Wholesale
- Vehicle sale and repair
- Construction
- Services

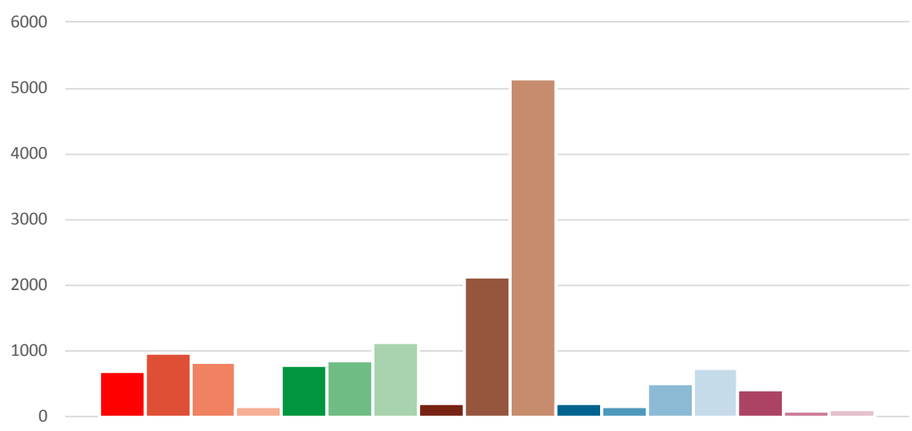
These specialisms for important elements of implementing the Strategic Outer London Development Centre (SOLDC) concept across the borough's employment land. Opportunities for intensification must take account of these clusters.



Distribution of total businesses by business activity



Distribution of total businesses by floorspace (sqm)



Distribution of employment numbers by sector

Spatial Preferences
Transport and Storage

General pattern of industrial sites across the borough

- Strong relationship to strategic road network, specifically Bronze Age Way, A206 and A20 (at Foots Cray Business Area)
- Strong tendency towards areas with large regularly shaped sites.

Business surveys

(Surveys not undertaken in Welling, Bexleyheath, Bexley Village or Foots Cray business areas)

What are the advantages of this location?

- Proximity to London
- Access to strategic road network
- Convenient for employees
- Land availability and rates

What could be improved about the location?

- Traffic congestion
- Rail links and bus frequency
- Anti-social behaviour

N 0 2km

Spatial Preferences
Wholesale

General pattern

- No strong relationship to infrastructure.
- Generally mid-sized building footprints.

Business surveys
What are the advantages of this location?

- Low land cost
- Close to motorways
- Established for employees

What could be improved about the location?

- Traffic congestion
- Affordability of workspace

N 0 2km

Spatial Preferences
Vehicle Sale and Repair

General pattern

- No strong relationship to infrastructure.
- No strong clustering in specific locations.
- Generally smaller plots.

Business surveys
What are the advantages of this location?

- Affordabliity of space and potential for large plots.
- Access for customers.

What could be improved about the location?

- Highways improvements.

N 0 2km

Spatial Preferences
Construction

General pattern

- No strong relationship to infrastructure.
- Localised clustering within larger industrial areas.
- Generally smaller sites.

Business surveys
What are the advantages of this location?

- Proximity to Central London a strong consideration.
- Availability of small units

What could be improved about the location?

- Fly tipping

N 0 2km

Spatial Preferences
Services

General pattern

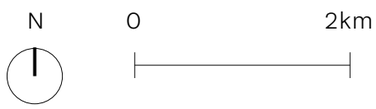
- Very strong tendency to cluster in certain locations, particularly Erith, Darrent Industrial Estate and Crayford Industrial Estate.
- No relationship to infrastructure.

Business surveys
What are the advantages of this location?

- Proximity to Central London.

What could be improved about the location?

- Provision of employee amenities
- Walking and cycling infrastructure
- Congestion and formalising vehicle movements/ parking.



Future Growth Sectors
Political and Economic Drivers

The re-provision of industrial space through intensification will be shaped by the political and policy context of the borough and the economic context of the borough and sub-region.

The Council's Growth Strategy and Draft Local Plan define a number of sectors and uses that the Council is promoting to meet its economic ambitions, such as manufacturing and low carbon goods.

The Employment Land Review (2021), prepared by Lichfields, provides evidence on the future growth potential of the borough's economy to support the Draft Local Plan. The review focusses specifically upon the latest job growth projections as an indicator of future demand, and commercial property market signals.

The Employment Land Review also identifies growing sectors. Manufacturing, high tech logistics and distribution are identified as key sectors.

The Employment Land Review models floorspace requirements under a number of growth scenarios, summarised in the table opposite.

The scenarios are :

1. Labour Demand – Projections of employment growth in various employment class sectors derived from economic forecasts from the GLA (July 2017 release).
2. Past Trends in Completion of Employment Space – based upon monitoring data from the London Development Database and how these trends might change in the future
3. Labour Supply – employment space calculated from the forecast for Borough's resident workforce based upon the housing target from the Publication London Plan (2020).

The Employment Land Review notes the strengths and weaknesses of each of these scenarios.

Within the context of the NPPF requirement to plan positively for future growth, scenario 1 from the Employment Land Review is considered a suitable benchmark. As the highest of the three scenarios, basing future spatial approaches to intensification of industiral land on this option is a conservtive view that will protect the borough's economy over the plan period.

The approach set out in this Industrial Land Intensification Study ensures that sufficient industrial land in the borough has the capacity to meet the floor space of those uses that must be accommodated on SIL or LSIS (Use Class B2 and B8) over the Plan period.

This total floor space includes an allowance for loss/ churn equivalent to the quantum of floor space on industrial sites identified in the Draft Local Plan that are proposed for a land-use designation change to primarily residential use and urban open space (see page 89 of this Study).

It should be noted that accommodating use classes E(g)i-E(g)iii on non-designated industrial land within the borough should be supported though local plan policies and associated strategies, particularly those relating to town centres.

Whilst incorporating light industrial uses within town centres will aid their resilience and diversification, tensions between delivering other town centre uses must be addressed through policy. It should also be noted that suitable sites in and around town centres for employment are also likely to be appropriate to meet other London-wide policy objectives such as the delivery of housing on small sites.

	1. Labour Demand (updated figures from the ELR Technical Paper)	2. Past Completion Rates	3. Labour Supply
Office E(g)(i)/E(g)(ii)	23,660	200	11,855
Light Industrial E(g)(iii)	48,150	60,220	25,865
Industrial B2	41,730		22,505
Distribution B8	105,480	79,870	56,540

Gross Employment Floorspace Requirements in Bexley over the Plan period (GEA sqm)

Future Growth Sectors
Economic Drivers

Bexley's strong industrial base is expected to experience continued growth, driven by an expansion of the existing storage and distribution sector and the application of new technologies to existing industries increasing efficiencies.

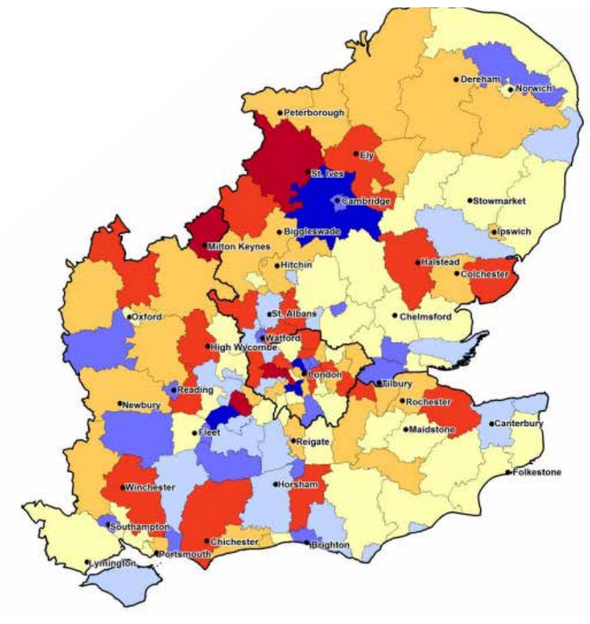
Outer London plays an important role in London's industrial economy, containing 76% of Greater London's total industrial land by land area and 69% by floorspace . Bexley is located within the east sub-region, which has both the lowest land values and the lowest intensity of uses relative to the rest of London . The borough enjoys a number of advantages, primarily relating to its location, access to the strategic road network and that network's connections to ports and airports, a workforce skilled in industrial activities, and low rents relative to inner and central London.

Different industrial sectors have differing sensitivities to being located in London. Bexley has a large share of those industrial activities which require London locations but not the highly skilled workforce available in central London. The most prominent is warehousing and distribution, which often require London locations to serve their markets particularly where they are involved in just-in-time logistics and the fulfilment of e-tailing and business to business deliveries. Storage and distribution businesses can import goods into ports in Essex or Kent or into one of the six major airports within an hour drive, bring the goods to their facility on the strategic road network, and then distribute those goods across London. Other sectors benefit from this, including vehicle sale and repair which supports the large fleets required.

In addition to storage and distribution, a review of London's industrial land supply identified other sectors with a propensity to locate in London and particularly outer London, including: food including food wholesale; utilities and waste; motor vehicle sale and repair; construction; and freight transport .

As expected, these activities are highly represented amongst Bexley's industrial uses. A number of the big supermarkets have customer fulfilment centre (CFC) sites in Belvedere, including Tesco, Asda, and Ocada/Morrisons, which was the largest facility of its type in the world when it was planned . The Bexley Riverside Industrial Land Audit found the highest number of businesses within the study area were active in the wholesale and construction industries. The greatest use of floorspace and employment was in transport and storage.

These sectors, particularly storage and distribution, have enjoyed growth in the past decade. This increased activity has also seen an increase in industrial employment; over the period 2009-15 industrial employment grew by 4% in London, 4% in the Wider South East and 3.8% nationally . Due to the high number of businesses in growing sectors, Bexley experienced one of the largest growths in industrial jobs over this period out of the entire south east of England, as shown in this map.



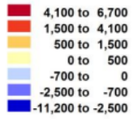
This growth is expected to continue. The London Industrial Land Demand report notes that storage and distribution has seen an "extraordinary growth in e-commerce and an increasing "want it now" consumer culture", which is expected to expand . While Bexley's storage and distribution and related sectors will grow to serve the growing population, other sectoral expansion will be powered by an increase in the application of high technology to traditional activity.

London has established itself as a centre for technological excellence, reflected by the commitments made by tech giants such as Apple, Google, Facebook and LinkedIn. A recent report from Knight Frank highlighted the melding of traditional sectors with technology to create entire new hybrid industries, including the emergence of four derivative tech sectors: FinTech; LegalTech; InsurTech; and MedTech .

Within Bexley, the melding of technology with traditional industrial uses is enhancing productivity within industrial areas, resulting in an increased demand for industrial floorspace. High tech activities tend not to be new businesses doing new things but rather established firms now growing because they have utilised technology to better undertake the activities that have been hallmarks of Bexley's industrial output for decades.

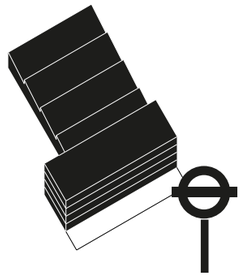
For example, local firm Truckbusters have sold used trucks and other commercial vehicles from their Erith site for decades, including repurposed specialist vehicles engineered to meet the particular needs of clients. The company recently trained its engineers to use Auto-CAD to design these specialised vehicles, which has improved the quality of their product and allowed them to work more efficiently. Similarly, Dartford Composites have also begun to use Auto-CAD to refurbish train parts, which has been so successful that the company is now looking for a larger facility.

Industrial Jobs Change 2009 - 2015



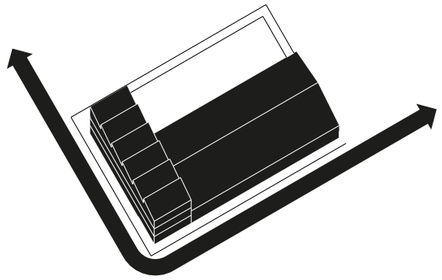
The Engine House has accelerated this activity by investing in training and facilities that allow local businesses to utilise technology. Located off of Yarnton Way in Thamesmead close to the nearby Belvedere industrial areas, the Engine House is a Council-operated business park offering over 12,000m^2 of flexible studio and office facilities , including more than 50 modern studios, hot design & fixed desk spaces with an in house business development team that can provide a professional place to a range of entrepreneurs. The Engine House is meeting a growing demand for this type of employment space, hosting a mix of business start-ups and small to medium-sized businesses. In addition to providing space, the Engine House offers access to cutting edge technologies including Auto-CAD, 3D printing, laser cutting, and VR. It will shortly open a 3D suite bringing together these and other technologies. Local businesses can take advantage of these facilities and training, which is making them more efficient and therefore more productive, resulting in a number of businesses requiring additional space.

Taking these economic factors and local policy context into account, a number of drivers of intensification specific to Bexley have been identified, and are summarised on the following page.



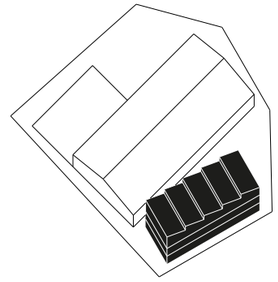
Connectivity

Access to public transport enables higher density employment uses to be co-located with larger industrial typologies.



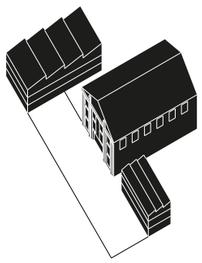
Placemaking

Changing context surrounding industrial areas require industrial areas to work harder in creating integrated, accessible places.



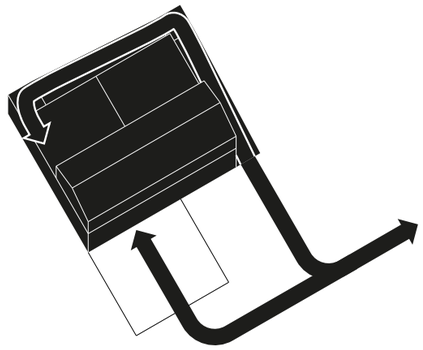
Infill

Changing market conditions trigger a more efficient use of under utilised sites through infill development.



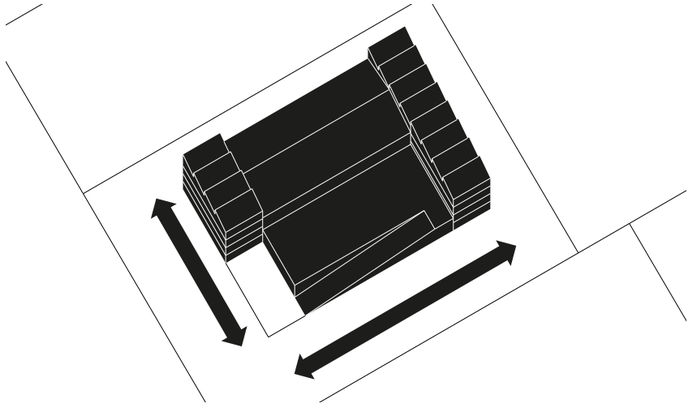
Heritage

Adaptation of industrial fabric with heritage value attracts new sectors into industrial areas.



Access

Good access to the strategic network and major markets creates demand for larger industrial space types.



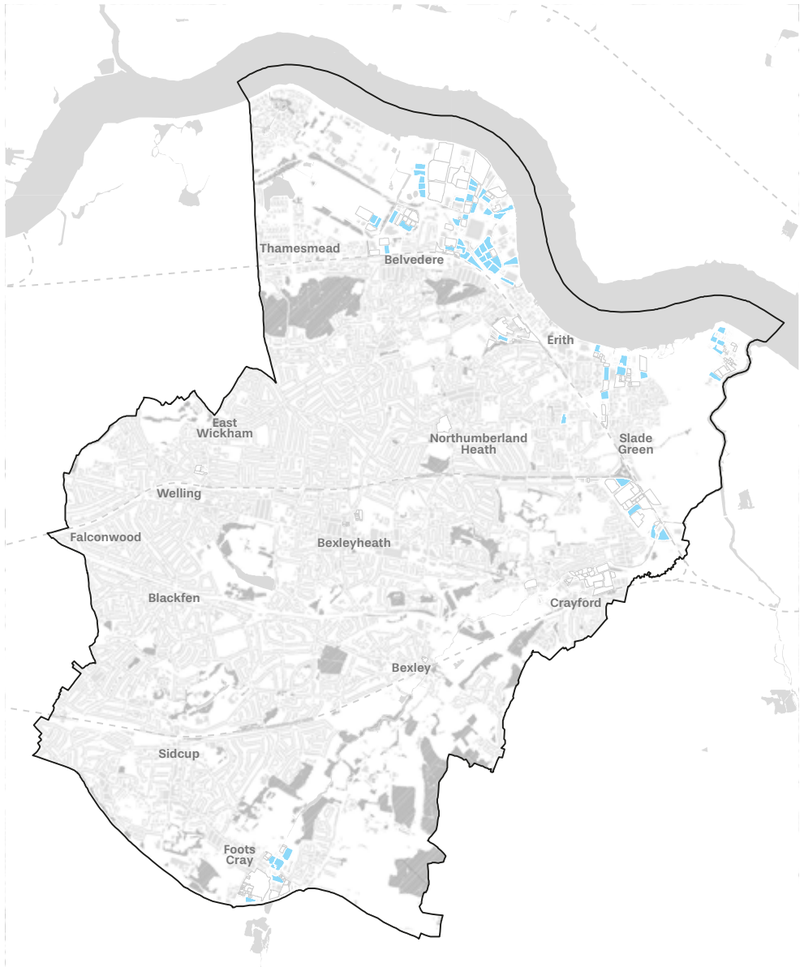
Grain

Large sites enable a variety of efficient configurations that can accommodate a mix of types of employment space.

Industrial Sub-Areas
Sites With Low Plot ratio (< 45%)

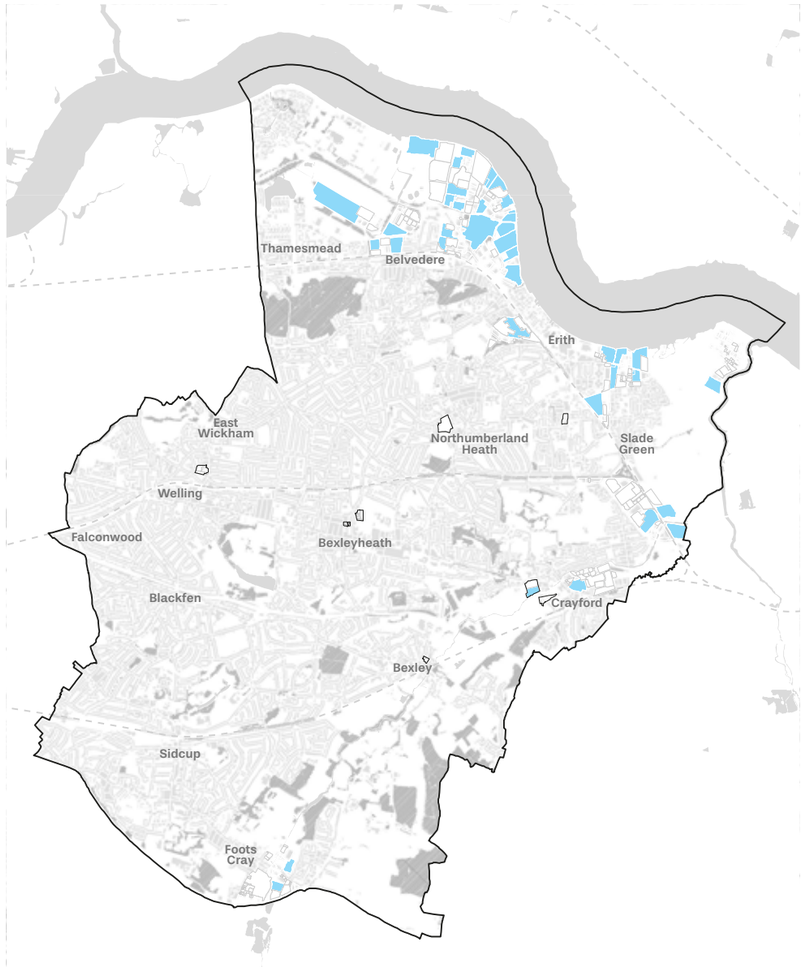
Small Sites
< 0.75 Ha

Opportunities for intensification on small sites are limited. Small sites in areas of low PTAL are unlikely to be suitable for intensification due to workspace typologies that can be accommodated on small sites, the higher employment densities that these spaces support and the parking provision that would be required. Opportunities do exist in Belvedere, Crayford and Foots Cray.



Medium Sites
0.75 – 1.75 Ha

Significant opportunities exist, but generally in locations that are unsuitable for typologies including a large proportion of high density employment. Unlike smaller sites some parking can be efficiently accommodated on medium sized sites in areas of moderate PTAL, such as Inner Belvedere and Foots Cray.



Large Sites
> 1.75 Ha

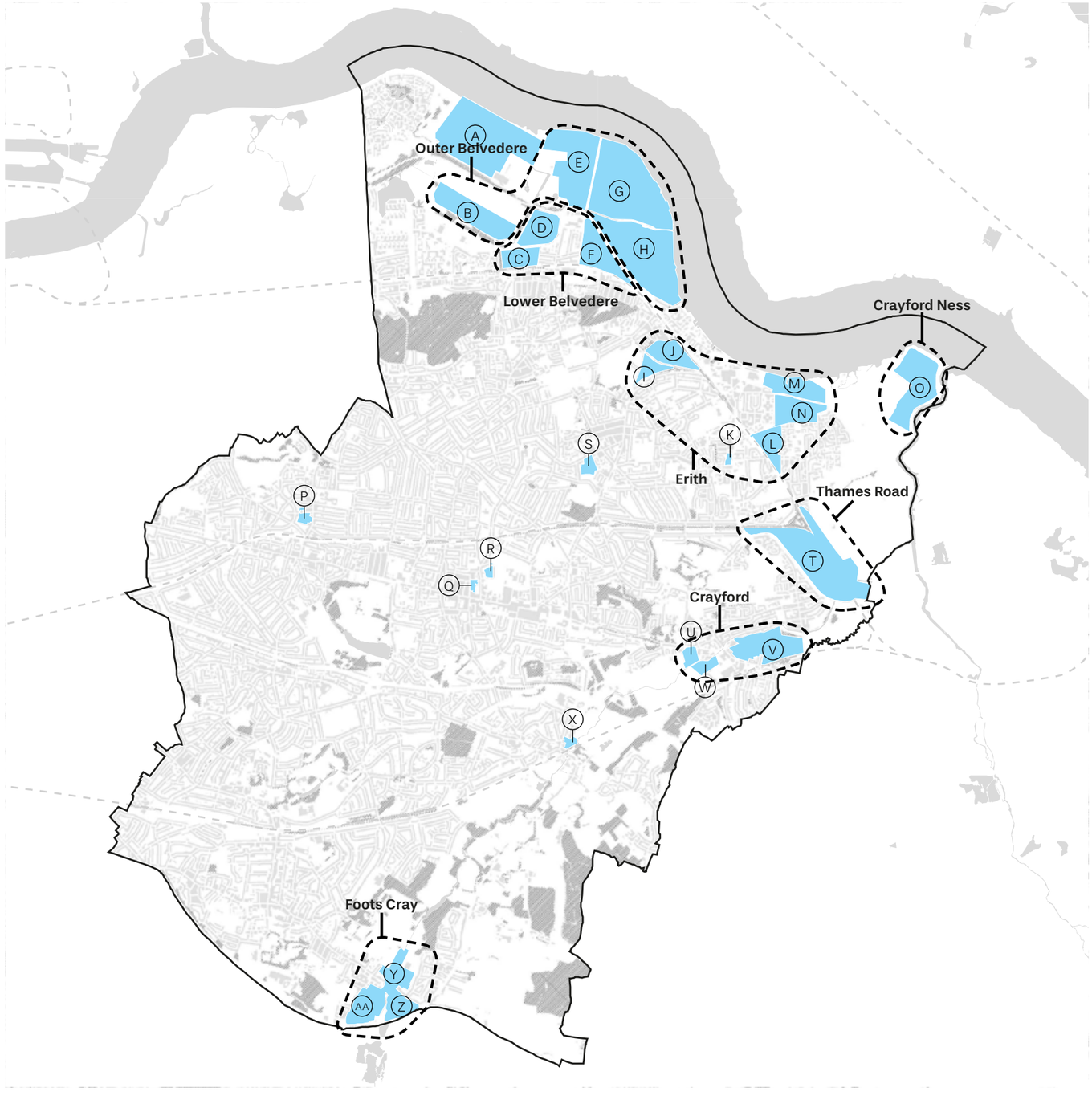
Significant opportunities exist, and can provide higher density employment space in Inner Belvedere, Erith and Foots Cray. Sites in less accessible areas can be suitable for stacked industrial typologies providing workspace that typically supports lower employment densities. Suitable sites are found in Thames Road and Foots Cray

Industrial Sub-Areas

Industrial sites within the borough form larger sub-areas. Due to the way in which these places have developed over time and their location, these sub areas exhibit similar spatial qualities, host similar types of industrial activity and have similar constraints.

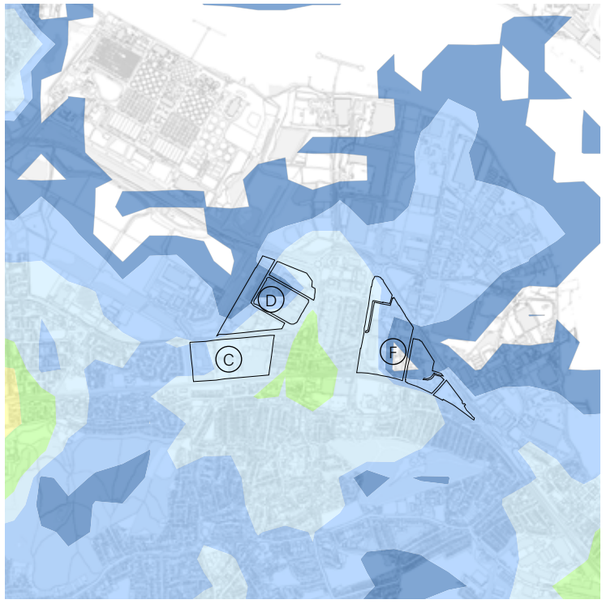
As such, the following pages set out strengths and weaknesses of each sub-area. These conditions are used to define drivers of intensification in each sub-area, and will be used to inform the parameters of new industrial typologies that could deliver spatial intensification of industrial land in the future. The following areas are defined in the Employment Land Review 2017, and form the basis for analysis in this section:

A Crossness Sewage Works
B Veridion Park
C Centurian Way
D Hailey Road Business Park
E Norman Road Employment Area
F Crabtree Manorway South Employment Area
G Crabtree Manorway North Employment Area
H Church Manorway South Employment Area
I Fraser Road
J Europa Estate
K Northend Trading Estate
L Slade Green Industrial Area
M Manor Road North Industrial Area
N Manor Road South Industrial Area
O Crayford Ness Employment Area
P Upper Wickham Lane
Q Princess Street Estate
R Upland Road Estate
S British Bakeries
T Thames Road Industrial Area
U Bourne Industrial Park
V Crayford Industrial Area
W Maxim Road
X Old Bexley
Y Foots Cray Business Area (A)
Z Foots Cray Business Area (B)
AA Foots Cray Business Area (C)



Industrial Sub-Areas
Lower Belvedere

C Centurian Way
D Hailey Road Business Park
F Crabtree Manorway South Employment Area



PTAL (2021 Forecast)

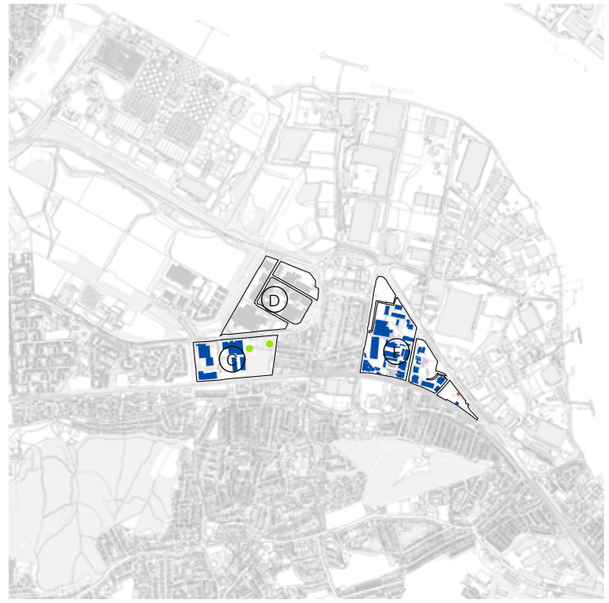
- 0
- 1a
- 1b
- 2
- 3
- 4
- 5
- 6a
- 6b

Plot Coverage

- 0–20%
- 21–40%
- 41–60%
- > 60%

Condition of floorspace

- Good
- Average
- Poor
- Not applicable



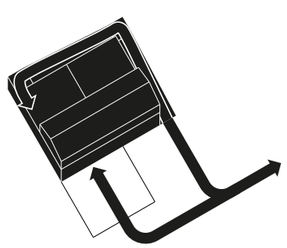
Building age and type

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

Industrial Sub-Areas
Inner Belvedere

The table opposite summarises the existing strengths and weaknesses of each sub-area around Belvedere. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Inner Belvedere:



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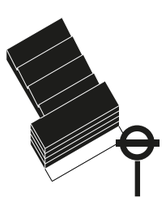
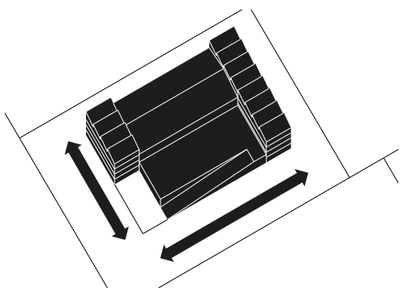
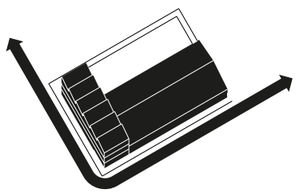


Connectivity



Grain

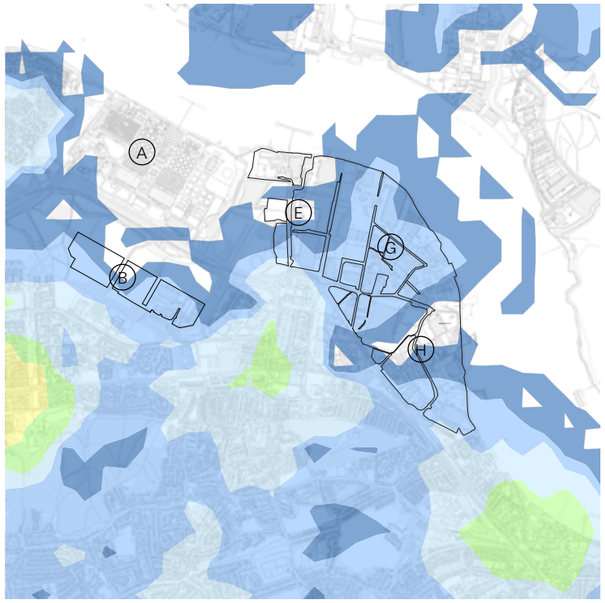


Placemaking

Sub-Area	Strengths	Weaknesses
Centurian Way	• Modern industrial building stock • Close to Belvedere Station • Good access to strategic road network	• Site wholly within flood zone 3 • Not designated SIL
Hailey Road Business Park	• Modern industrial building stock • Generally good condition building stock • Good access to strategic road network	• Site wholly within flood zone 3
Crabtree Manorway South Employment Area	• Modern industrial building stock with large units • Larger building footprints and building heights • Cluster of manufacturing uses • High concentration of transport and storage • Good access to strategic road network • Comparatively high rental/land values within the borough	• Small units with low building heights • Generally poor condition building stock • Area contains drainage ditches and dykes • Site wholly within flood zone 3

Industrial Sub-Areas
Outer Belvedere

A Crossness Sewage Works
B Veridion Park
E Norman Road Employment Area
G Crabtree Manorway North Employment Area
H Church Manorway South Employment Area



PTAL (2021 Forecast)

- 0
- 1a
- 1b
- 2
- 3
- 4
- 5
- 6a
- 6b

Plot Coverage

- 0–20%
- 21–40%
- 41–60%
- > 60%

Condition of floorspace

- Good
- Average
- Poor
- Not applicable

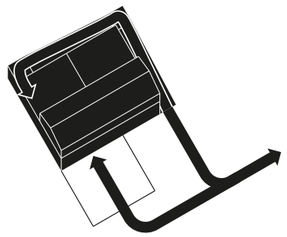
Building age and type

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

Industrial Sub-Areas
Outer Belvedere

The table opposite summarises the existing strengths and weaknesses of each sub-area around Belvedere. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Belvedere Fringes:



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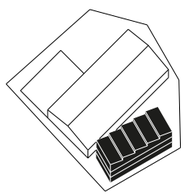

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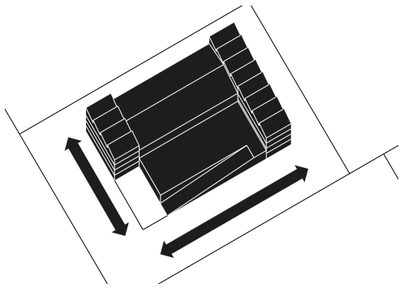
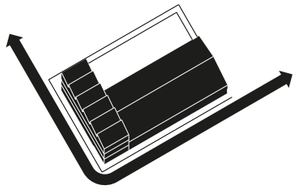


Grain

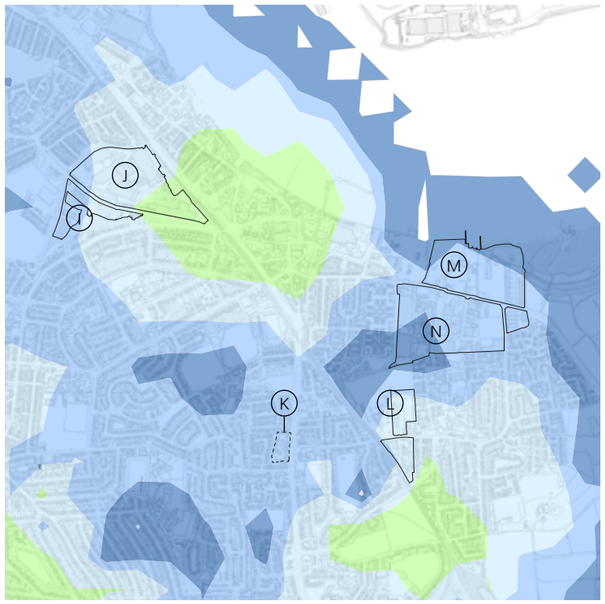


Placemaking

Sub-Area	Strengths	Weaknesses
Crossness Sewage Works	• Single purpose built facility	• Site wholly within flood zone 3 • Very poor public transport accessibility
Veridion Park	• Potential development sites • Close to Belvedere Station • Good access to strategic road network	• Area contains drainage ditches and dykes • Site wholly within flood zone 3 • Poor public transport accessibility
Norman Road Employment Area	• Modern industrial building stock with large units • Access to river and wharves • Larger building footprints and building heights • High concentration of transport and storage • Good access to strategic road network • Comparatively high rental/land values within the borough	• Area contains drainage ditches and dykes • Poor public transport accessibility
Crabtree Manorway North Employment Area	• High concentration of transport and storage • Large site under GLA ownership • Parts of the area have good access to strategic road network • Comparatively high rental/land values within the borough	• Clusters of poor condition building stock • Area contains drainage ditches and dykes • Activities requiring specialised or heavy industrial hardware • Site wholly within flood zone 3 • Poor public transport accessibility
Church Manorway South Employment Area	• Modern industrial building stock with large units • Larger building footprints and building heights • Cluster of manufacturing uses • High concentration of transport and storage • Good access to strategic road network • Comparatively high rental/land values within the borough	• Activities requiring specialised or heavy industrial hardware • Site wholly within flood zone 3 • Poor public transport accessibility

Industrial Sub-Areas
Erith

I Fraser Road
J Europa Estate
K Northend Trading Estate
L Slade Green Industrial Area
M Manor Road North Industrial Area
N Manor Road South Industrial Area



PTAL (2021 Forecast)

0
1a
1b
2
3
4
5
6a
6b

Plot Coverage

0–20%
21–40%
41–60%
> 60%

Condition of floorspace

Good
Average
Poor
Not applicable

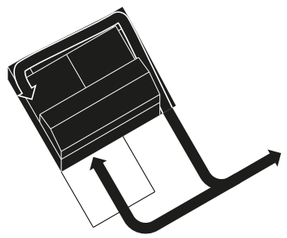
Building age and type

Late C20th and modern industrial buildings
Post-1945 industrial building
Pre-1945 factory, depot or warehouse
Specialised heavy industrial hardware
Offices
Containers/storage
Shed
Retail
No data

Industrial Sub-Areas
Erith

The table opposite summarises the existing strengths and weaknesses of each sub-area around Belvedere. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Erith:



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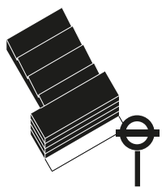
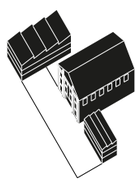
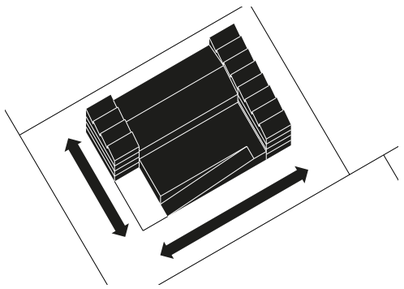


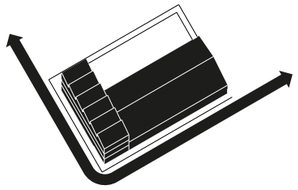
Connectivity



Heritage



Grain



Placemaking

Sub-Area	Strengths	Weaknesses
Fraser Road	• Multistorey industrial building • Close to Belvedere Station • Good access to strategic road network	• Not designated SIL
Europa Estate	• Large industrial units • Existing industrial buildings with heritage value • Close to Erith Station • Presence of art, culture and leisure uses • Majority of site under three main owners Good access to strategic road network	• Vacant building • Not designated SIL • Site partially within flood zone 3
Northend Trading Estate	• Access to strategic road network	• Site access limited to north bound vehicles • Visibility from the road
Slade Green Industrial Area	• Area south of Slade Green Road close to Slade Green station • Locally listed church adjacent to the site	• Partially cleared for residential development. • High proportion of non-SIL uses • Poor access to strategic road network relative to other industrial areas • Vehicular movements associated with industrial activities causing environmental issues in surrounding residential areas
Manor Road North Industrial Area	• Historically attracted heavy industrial activities • National Construction College site under LBB ownership	• Poor access to strategic road network • Site partially within flood zone 3
Manor Road South Industrial Area	• Historically attracted heavy industrial activities	• Vacant buildings and partially vacant sites • Poor access to strategic road network

Industrial Sub-Areas
Crayford Ness

O Crayford Ness Employment Area

PTAL (2021 Forecast)

- 0
- 1a
- 1b
- 2
- 3
- 4
- 5
- 6a
- 6b

Plot Coverage

- 0–20%
- 21–40%
- 41–60%
- > 60%

Condition of floorspace

- Good
- Average
- Poor
- Not applicable

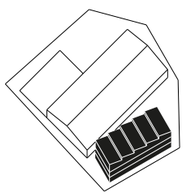
Building age and type

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

Industrial Sub-Areas
Crayford Ness

The table opposite summarises the existing strengths and weaknesses of each sub-area in Crayford Ness. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Crayford Ness:

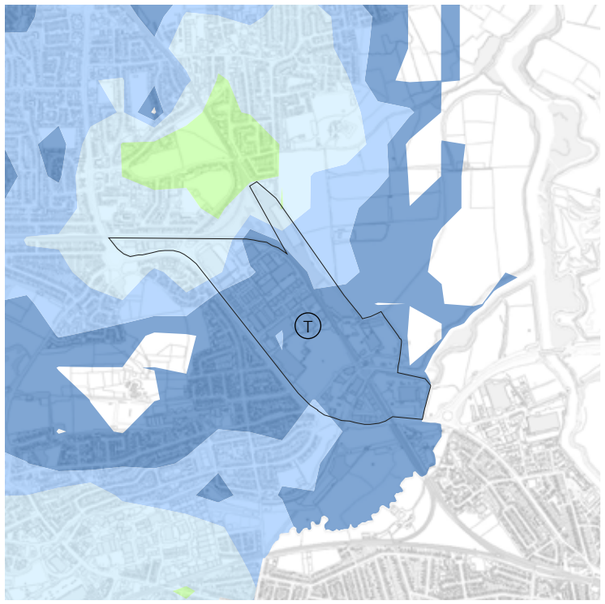


Infill

Sub-Area	Strengths	Weaknesses
Crayford Ness Employment Area	• High concentration of construction and vehicle repair uses	• Poor condition building stock on small plots with low plot ratio • High number of sheds with low building height • Poor access to strategic road network • Partially vacant sites • Fragmented land ownership Site wholly within flood zone 3

Industrial Sub-Areas
Thames Road

T Thames Road Industrial Area
U Bourne Industrial Park
V Crayford Industrial Area
W Maxim Road



PTAL (2021 Forecast)

- 0
- 1a
- 1b
- 2
- 3
- 4
- 5
- 6a
- 6b

Plot Coverage

- 0-20%
- 21-40%
- 41-60%
- > 60%

Condition of floorspace

- Good
- Average
- Poor
- Not applicable

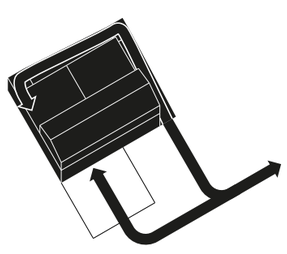
Building age and type

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

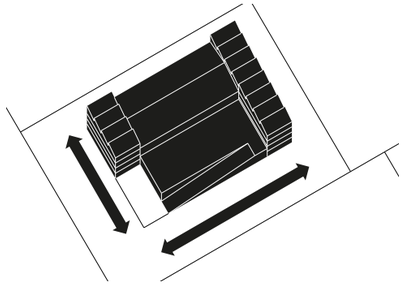
Industrial Sub-Areas
Thames Road

The table opposite summarises the existing strengths and weaknesses of each sub-area in Thames Road. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Thames Road:



Access

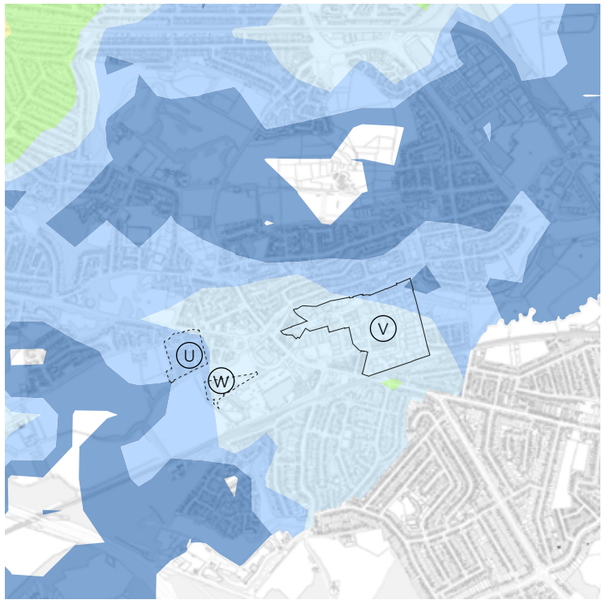


Grain

Sub-Area	Strengths	Weaknesses
Thames Road Industrial Area	• High plot ratio relative to other sites in OAPF Area • Modern industrial stock with large units • Cluster of manufacturing uses • High concentration of transport and storage • Waste Centre site under GLA ownership Good access to strategic road network	• Cluster of poor quality buildings • Some vacant buildings and partially vacant sites • Site partially within flood zone 3

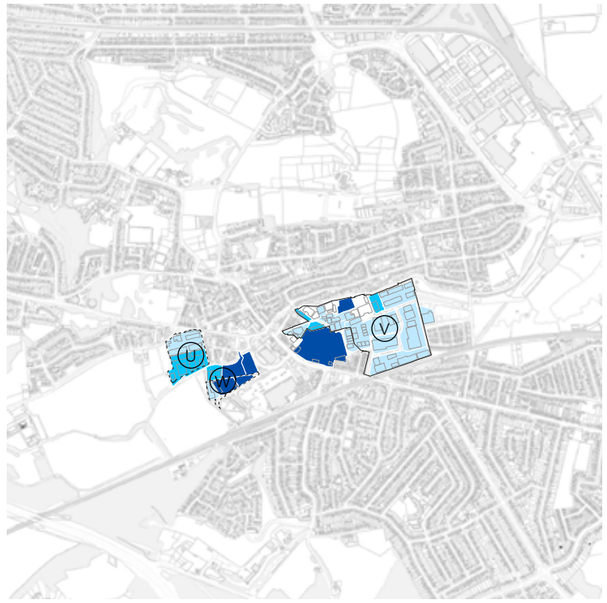
Industrial Sub-Areas
Crayford

T Thames Road Industrial Area
U Bourne Industrial Park
V Crayford Industrial Area
W Maxim Road



PTAL (2021 Forecast)

0
1a
1b
2
3
4
5
6a
6b



Plot Coverage

0–20%
21–40%
41–60%
> 60%

Condition of floorspace

Good
Average
Poor
Not applicable

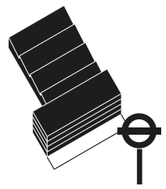
Building age and type

Late C20th and modern industrial buildings
Post-1945 industrial building
Pre-1945 factory, depot or warehouse
Specialised heavy industrial hardware
Offices
Containers/storage
Shed
Retail
No data

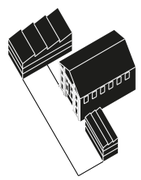
Industrial Sub-Areas
Crayford

The table opposite summarises the existing strengths and weaknesses of each sub-area around Belvedere. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

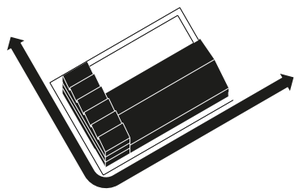
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Crayford:



Connectivity



Heritage

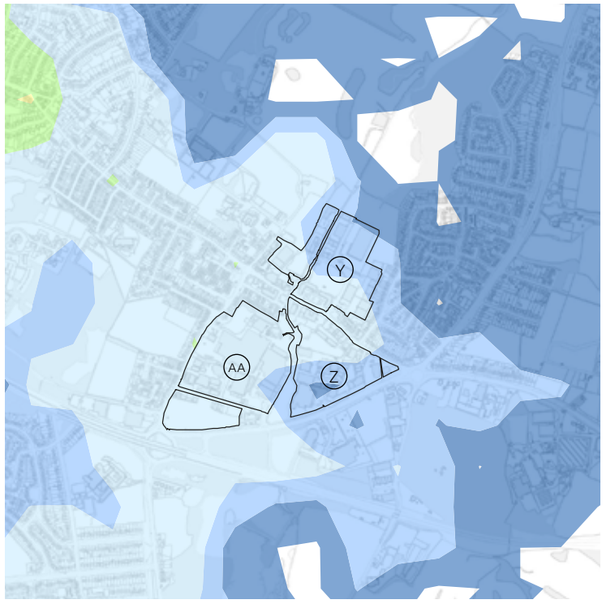


Placemaking

Sub-Area	Strengths	Weaknesses
Thames Road Industrial Area	• High plot ratio relative to other sites in OAPF Area • Modern industrial stock with large units • Cluster of manufacturing uses • High concentration of transport and storage • Waste Centre site under GLA ownership Good access to strategic road network	• Cluster of poor quality buildings • Some vacant buildings and partially vacant sites • Site partially within flood zone 3
Bourne Road Employment Area	• Modern industrial building stock • Cluster of workshops • Large development site	• Poor access to strategic road network
Crayford Industrial Area	• Some mid-C20th buildings • Cluster of workshop • Comparatively high rental/land values within the borough	• Cluster of poor condition building stock No large industrial units • Poor access to strategic road network • Presence of restaurants and retail within SIL • Vacant sites Site partially within flood zone 3
Maxim Road	• Modern industrial building stock	• Poor access to strategic road network • Vacant sites • Site partially within flood zone 3

Industrial Sub-Areas
Foots Cray

Y Foots Cray Business Area (A)
Z Foots Cray Business Area (B)
AA Foots Cray Business Area (C)



PTAL (2021 Forecast)

- 0
- 1a
- 1b
- 2
- 3
- 4
- 5
- 6a
- 6b

Plot Coverage

- 0-20%
- 21-40%
- 41-60%
- > 60%

Condition of floorspace

- Good
- Average
- Poor
- Not applicable

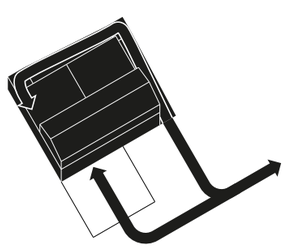
Building age and type

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

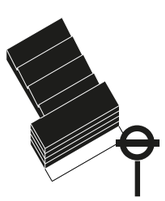
Industrial Sub-Areas
Foots Cray

The table opposite summarises the existing strengths and weaknesses of each sub-area around Belvedere. The information is based upon the LBB Industrial Land Audit, Employment Land Review 2017 and the emerging LBB Characterisation Study.

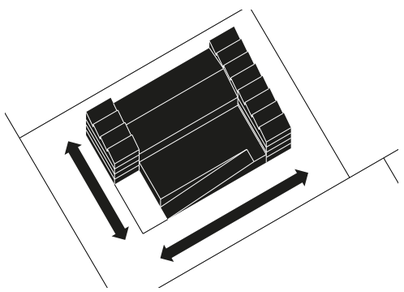
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Foots Cray:



Access



Connectivity



Grain

Sub-Area	Strengths	Weaknesses
Foots Cray Business Area (A)	• Good access to strategic road network • Bus services • Modern office buildings create a good appearance to the wider area. • Existing landscaping creates a positive environment.	• Partially within flood zone 3.
Foots Cray Business Area (B)	• Good access to strategic road network • Bus services • Visible presence from the main roads.	• Partially within flood zone 3.
Foots Cray Business Area (C)	• Good access to strategic road network • Bus services • Large site under single ownership with modern facilities.	• Partially within flood zone 3. • Built fabric generally in a poor condition. • Poor quality environment contributes to a lower market profile.

Industrial Sub-Areas
Other Small LSIS Sites

PTAL (2021 Forecast)

- 0
- 1a
- 1b
- 2
- 3
- 4
- 5
- 6a
- 6b

Plot Coverage

- 0-20%
- 21-40%
- 41-60%
- > 60%

Condition of floorspace

- Good
- Average
- Poor
- Not applicable

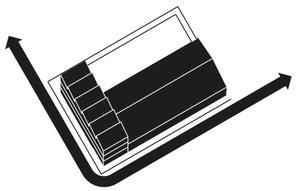
Building age and type

- Late C20th and modern industrial buildings
- Post-1945 industrial building
- Pre-1945 factory, depot or warehouse
- Specialised heavy industrial hardware
- Offices
- Containers/storage
- Shed
- Retail
- No data

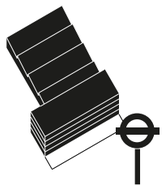
Industrial Sub-Areas
Other Small LSIS Sites

The table opposite summarises the existing strengths and weaknesses of each sub-area around Belvedere. The information is based upon the LBB Industrial Land Audit, Employment Land Review and the emerging LBB Characterisation Study.

Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification on small LSIS sites:



Placemaking



Connectivity

Sub-Area	Strengths	Weaknesses
Welling	• Good public transport accessibility.	• Constrained due to residential location.
Bexleyheath	• Good public transport accessibility.	• Site access via narrow roads. • Constrained due to residential location.
Northumberland Heath	• -	• Residential context create access problems for the site, particularly for HGVs.

Site Types
Typologies

The locations, size, shape and context of the sites reviewed require a diversity of building typologies to deliver intensification. Typologies suitable to the context of Bexley are summarised in the table opposite. Some typologies are only suited to certain sizes of sites, and further variations in these typologies will be required to ensure capacity is optimised:

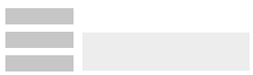
1
These typologies are unsuitable in areas of low PTAL.

2
Two variants of this type may be suitable for different size sites with alternative approaches to providing HGV access to upper storeys.

The generic typologies summarised in the table opposite will be tested on the relevant case study site(s). These case studies will ensure that a real-world spatial efficiency on the sites are tested, and therefore a more accurate capacity.

Typology Density

This capacity will be summarised as quantum of employment space and operational yard space per hectare (referred to as 'typology density' in following pages) and used to establish floorspace capacity and external operational capacity of intensification sites across the borough.

		Workspace Intensification	Small < 0.6 Ha	Medium 0.6 - 1.5 ha	Large > 1.5 Ha	Case Study Site
A		Multi-storey workshop (B1a/B1b/B1c)	1	●	●	61 - Acorn Truck Sales
B		Adjacent workshop and warehouse (B1a/B1c) + (B2/B8)		●	●	56 - Vacant
C		Adjacent workshop and stacked warehouse (B1a/B1c) + (B2/B8)		●	●	85 - Edible Oils
D		Stacked warehouse (B2/B8)		2	2	56 - Vacant (Small) 162 - Speedy Erith
		Workspace + Residential Co-location				
E		Stacked workshop and residential (B1a/B1b/B1c) + (C3)	1	●	●	263 - Fraser Road
F		Stacked warehouse and residential (B2/B8) + (C3)			●	405 - Northend Trading Estate

Inner Belvedere
Site partially used for surface parking
Site ID – 56
Site Area – 1.08 Ha
Building Condition – N/A

PTAL – 1b

Inner Belvedere
Edible Oils, site partially unused.
Site ID – 85
Site Area – 2.52 Ha
Building Condition – Average

PTAL – 1b/2

Erith Vacant site
Site ID – 263
Site Area – 0.30 Ha
Building Condition – Average

PTAL – 3

Crayford
Acorn Truck Sales
Site ID – 61
Site Area – 0.42 Ha
Building Condition – Good

PTAL – 2

Crayford
BT Fleet
Site ID – 192
Site Area – 0.66 Ha
Building Condition – Average

PTAL – 1b

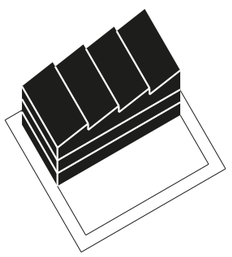
Erith
Speedy Erith
Site ID – 162
Site Area – 1.87 Ha
Building Condition – Average/Poor

PTAL – 1b

Northend Trading Estate
Vacent Site
Site ID – 405
Site Area – 0.93 Ha
Building Condition – Average/Good

PTAL – 1b

Typologies
Multi-storey Workshop



Dimensions	
Area	Typical floorplate dimensions - 20 x 40m
Height	Ceiling height -4-8m

Access and Servicing	
Yard space	LGV Access - 16m deep yard for ground floor units/goods lift HGV Access - Single 27m deep shared loading bay serving all units
Multi-storey requirements	Goods lift to units on upper storeys served by shared LGV/HGV loading.

Place	
	Workshop/studio units can provide active frontages onto street. Employee access should be differentiated from servicing. Studio and workshop spaces require good quality daylighting.

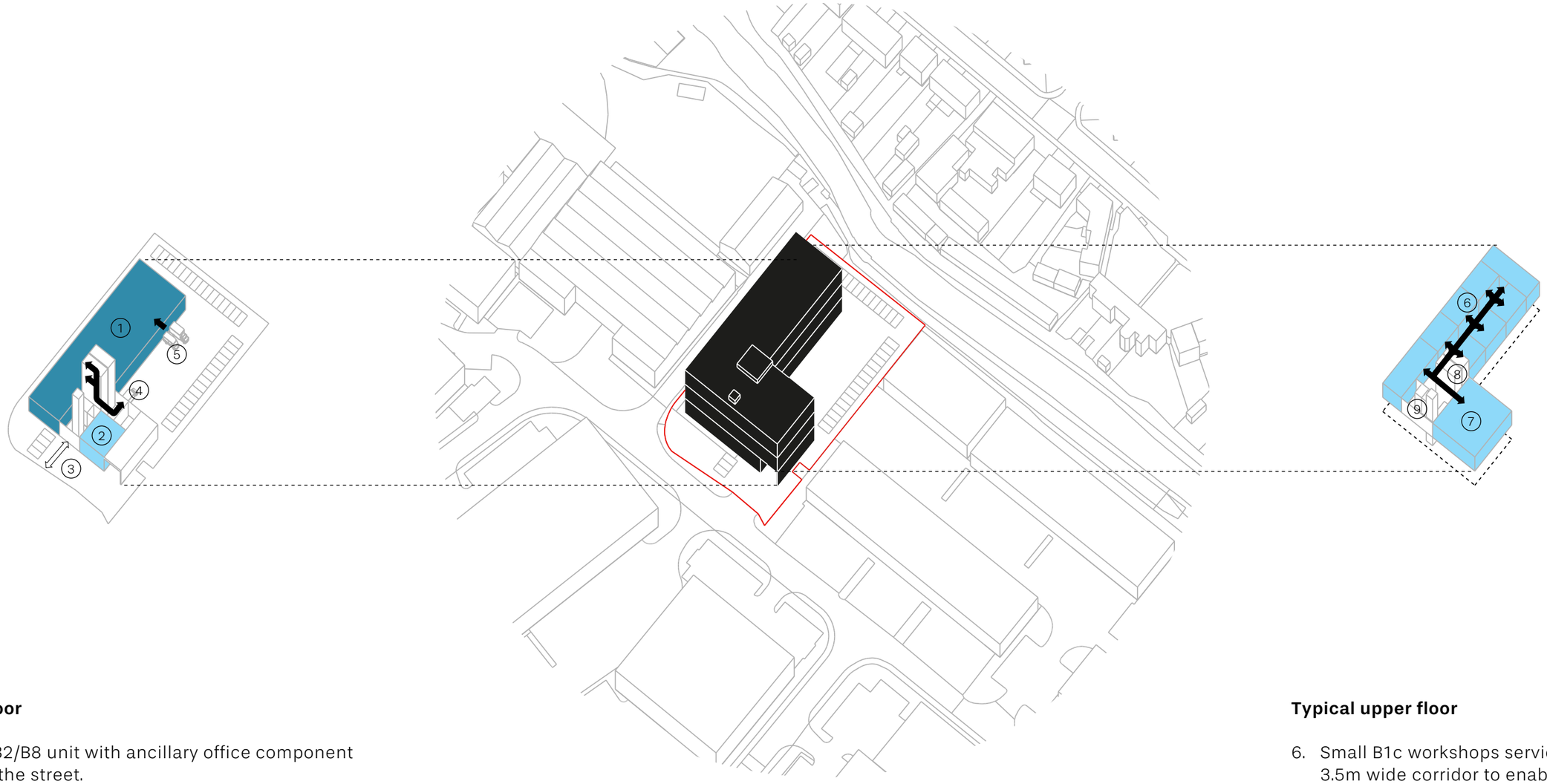
Gewerberhof Laim, Munich, Germany

- Light industrial building leased to 50 SMEs
- Goods lifts serve units on upper storeys
- Consistent frontage along main street creates good street environment within a business park

Ada Street Studios, Hackney

- 8 storey building providing studio and workshop space.
- Goods lifts serve units on upper storeys.
- Access provided along full length galleries along south elevation.

Typologies
Multi-storey workshop



Ground floor

1. Small B2/B8 unit with ancillary office component facing the street.
2. Small E(g)iii unit with street frontage.
3. Customer and employee entrance direct from street and providing good quality frontages, reinforcing building line of adjacent sites.
4. LGV loading bay accessed via rear yard, providing servicing to ground floor B1c unit and 2 no. goods lifts serving upper storeys
5. LGV loading bays providing servicing to ground floor B2/B8 unit.

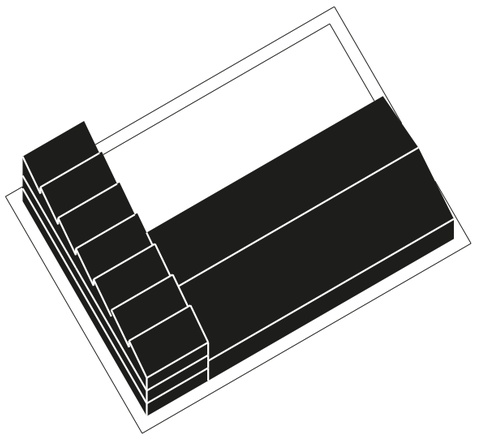
Typology Density
11,060 m² employment floorspace per ha

E(g)i NIA	2,340 m²	E(g)iii density	5,550 m² per ha
B2/B8 NIA	1,020 m²	B2/B8 density	2,430 m² per ha
Ext. Operational Area	1,300 m²		

Typical upper floor

6. Small B1c workshops serviced via goods lift and 3.5m wide corridor to enable forklift circulation.
7. Larger B1c unit with direct access to goods lifts.
8. 2no. goods lifts.
9. Shared kitchen and toilets surrounding stair core.

Typologies
Adjacent Workshop and Warehouse



Atos, Amsterdam

HereEast, Hackney

Dimensions	
Area	Typical studio/workshop floor plate dimensions – 20 x 40m Typical medium industrial floor plate dimensions – 40 x 80m
Height	Ceiling height studio/workshop –4–8m Ceiling height medium industrial –6–8m

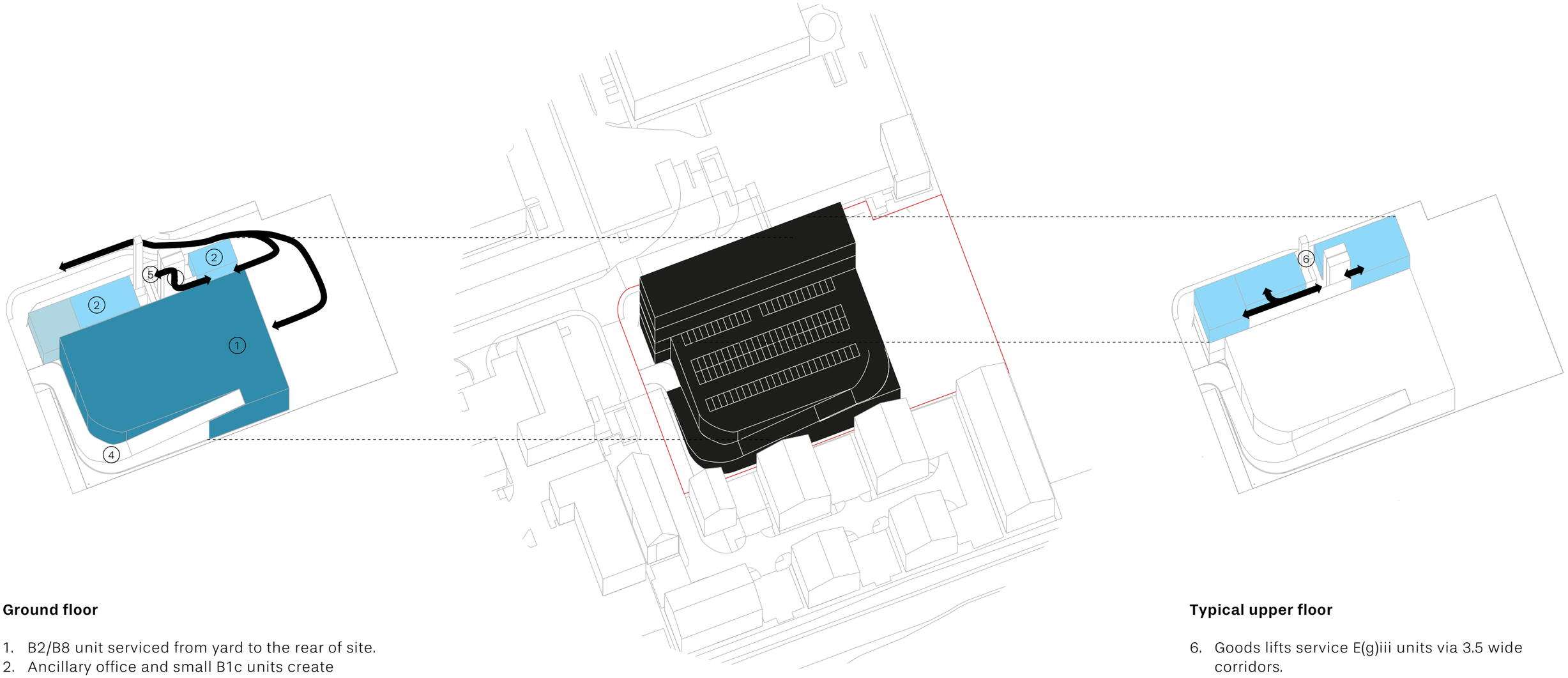
Access and Servicing	
Yard space	LGV Access – 16m deep yard for ground floor units/goods lift HGV Access – Single 27m deep loading bay serving all units
Multi–storey requirements	Goods lift to units on upper storeys served by shared LGV/HGV loading.

Place	
	Workshop/studio units can provide active frontages onto street. Employee access should be differentiated from servicing. Studio and workshop spaces require good quality daylighting. Buildings form the boundary along at least two edges of site

- Adjacent linked office and light industrial buildings.
- Office component creates good quality street, industrial space buffers against the railway to the north.
- Servicing to industrial space from yard.

- Re–purposed communications facility.
- Provides light industrial space for advanced manufacturing and broadcast studios.
- Deep plan workspace wrapped on one side with stacked studio space on re–purposed gantry.

Typologies
Adjacent Workshop and Warehouse



Ground floor

1. B2/B8 unit serviced from yard to the rear of site.
2. Ancillary office and small B1c units create positive frontage along western edge of site.
3. 2no. goods lifts serviced from Internal loading bay to avoid congestion of yard.
4. Ramp providing car access to parking at first floor level.
5. Shared entrance lobby and circulation for B1c units on upper storeys.

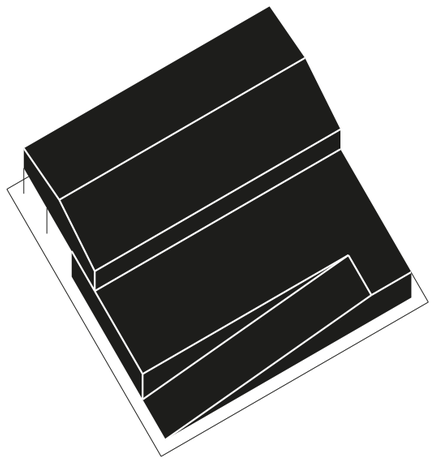
Typology Density
7,270 m² employment floorspace per ha

E(g)i NIA	510 m²	E(g)i density	510 m² per ha
E(g)iii NIA	2,340 m²	E(g)iii density	2,340 m² per ha
B2/B8 NIA	3,080 m²	B2/B8 density	3,080– m² per ha
Ext. Operational Area	3,060 m²		

Typical upper floor

6. Goods lifts service E(g)iii units via 3.5 wide corridors.

Typologies
Stacked Warehouse



Theydon Road, Hackney

- Multi-storey industrial units.
- Utilises topography to give LGV access to upper storey.

Peruvian Wharf, Newham

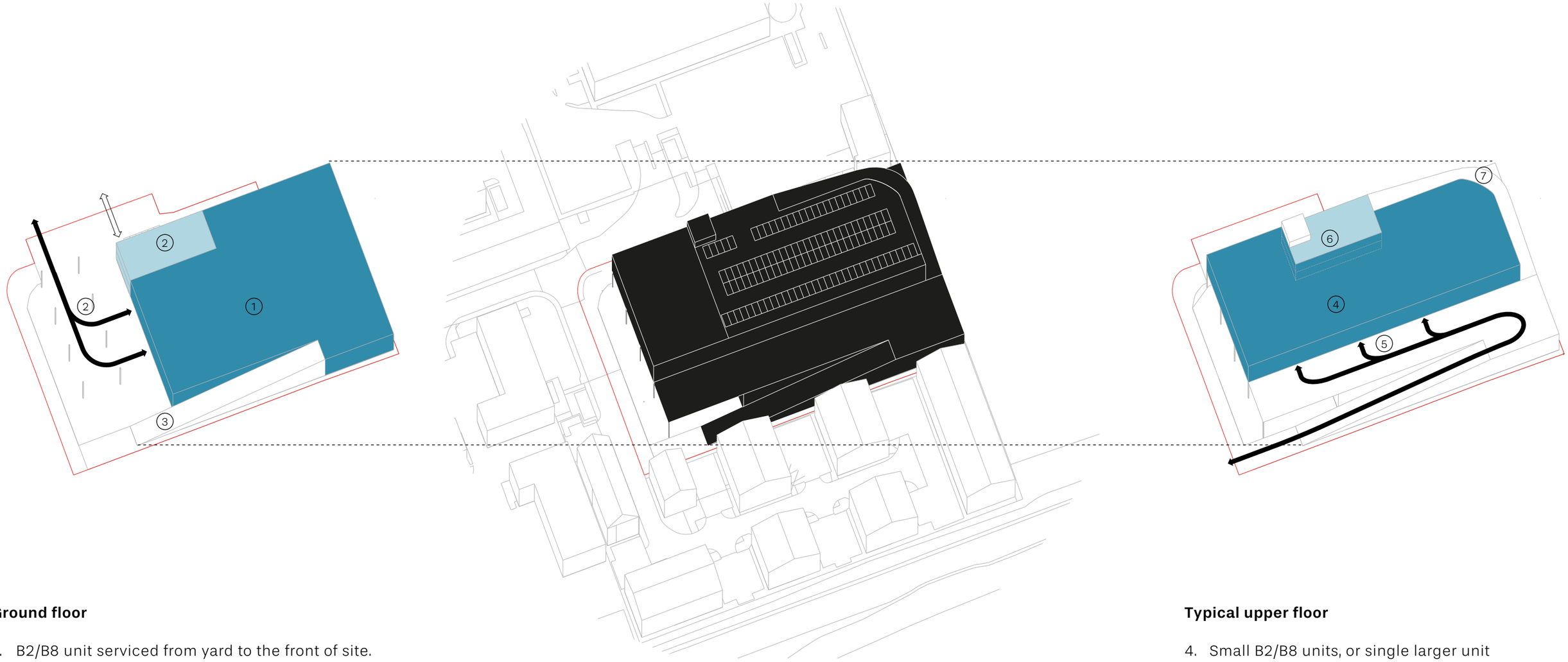
- Speculative urban logistics facility over three storeys.
- Ramps provide LGV and HGV access to upper storeys

Dimensions	
Area	Typical large industrial floor plate dimensions – 50 x 100m
Height	Ceiling height large industrial –10–13m

Access and Servicing	
Yard space	HGV Access – Single 27m deep loading bay serving all units
Multi–storey requirements	Ramp for LGV/HGV access to upper storeys Large spans over ground floor yard space to enable vehicle movements.

Place	
	Workshop/studio units can provide active frontages onto street. Employee access should be differentiated from servicing. Studio and workshop spaces require good quality daylighting.

Typologies
Stacked Warehouse (Small)



Ground floor

1. B2/B8 unit serviced from yard to the front of site.
2. Ancillary office create positive frontage along western edge of site with visitor parking.
3. Ramp providing service access for small rigid goods vehicles to first floor level and employee parking at second floor.

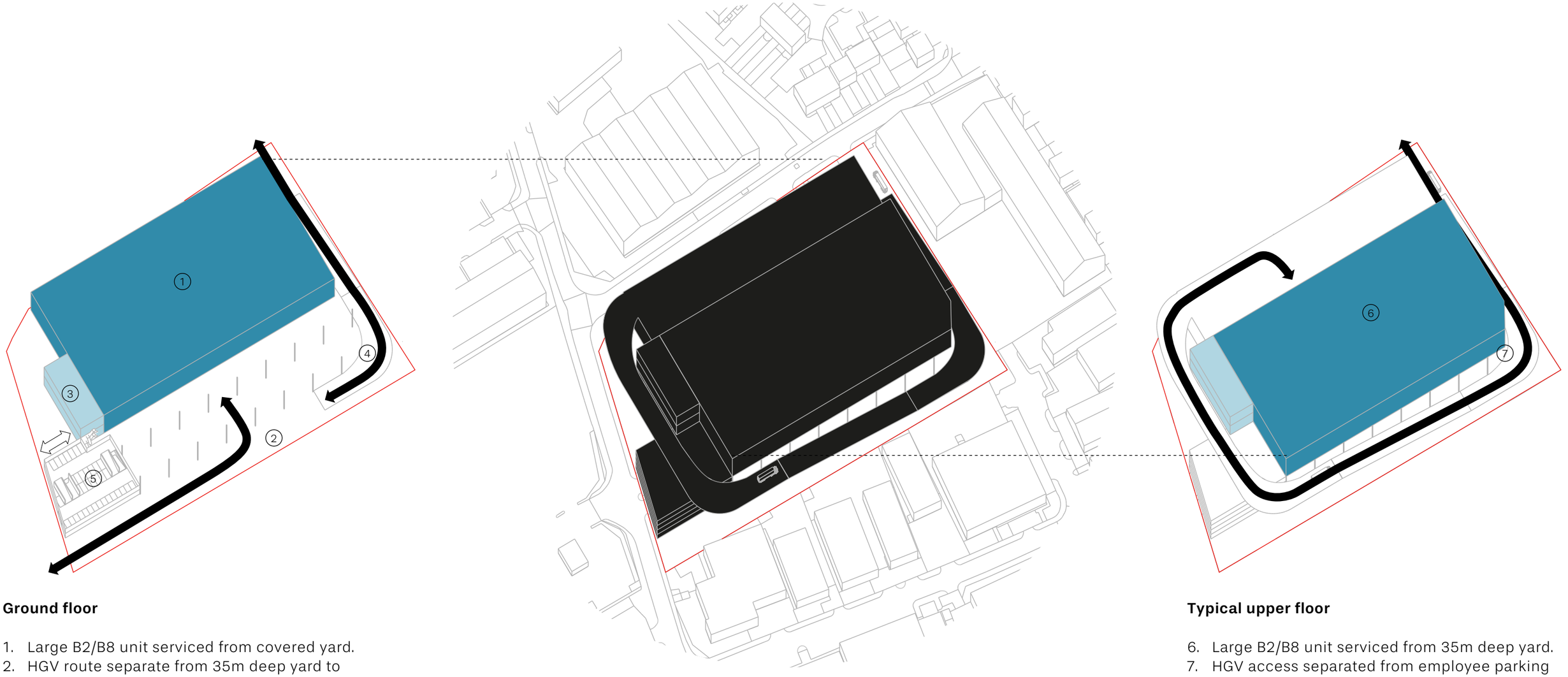
Typology Density
10,960 m² employment floorspace per ha

E(g)i NIA	1,110 m²	E(g)i density	1,113 m² per ha
E(g)iii NIA	0 m²	E(g)iii density	0 m² per ha
B2/B8 NIA	8,718 m²	B2/B8 density	8,739 m² per ha
Ext. Operational Area	3,691 m²		

Typical upper floor

4. Small B2/B8 units, or single larger unit
5. Service access for small rigid goods vehicles from yard.
6. Ancillary office with entrance directly onto street.
7. Ramp access to employee parking at second floor.

Typologies
Stacked Warehouse (Large)



Ground floor

1. Large B2/B8 unit serviced from covered yard.
2. HGV route separate from 35m deep yard to enable subdivision of ground floor into separate suites and minimising management of yard.
3. Ancillary office creates positive frontage onto street.
4. HGV ramp to upper storey workspaces.
5. Multistorey employee car park with direct access into ancillary office and units.

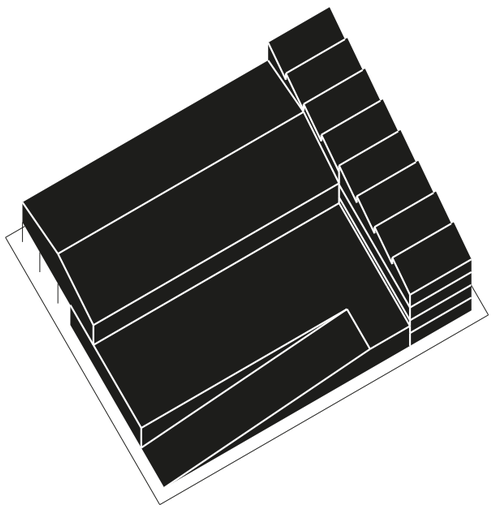
Typology Density
9,180 m² employment floorspace per ha

E(g)i NIA	1,476 m²	E(g)i density	790 m² per ha
B2/B8 NIA	15,366 m²	B2/B8 density	8,220 m² per ha
Ext. Operational Area	7,900 m²		

Typical upper floor

6. Large B2/B8 unit serviced from 35m deep yard.
7. HGV access separated from employee parking access to minimise congestion.

Typologies
Adjacent Workshop and Stacked Warehouse



Dimensions	
Area	Typical studio/workshop floor plate dimensions – 20 x 40m Typical medium industrial floor plate dimensions – 40 x 80m
Height	Ceiling height studio/workshop –4–8m Ceiling height medium industrial –6–8m

Access and Servicing	
Yard space	LGV Access – 16m deep yard for ground floor units/goods lift HGV Access – Single 27m deep loading bay serving all units
Multi–storey requirements	Goods lift to units on upper storeys served by shared LGV/HGV loading. Vehicle ramp provides access to upper storey industrial units

Place	
	Workshop/studio units can provide active frontages onto street. Employee access should be differentiated from servicing. Studio and workshop spaces require good quality daylighting.

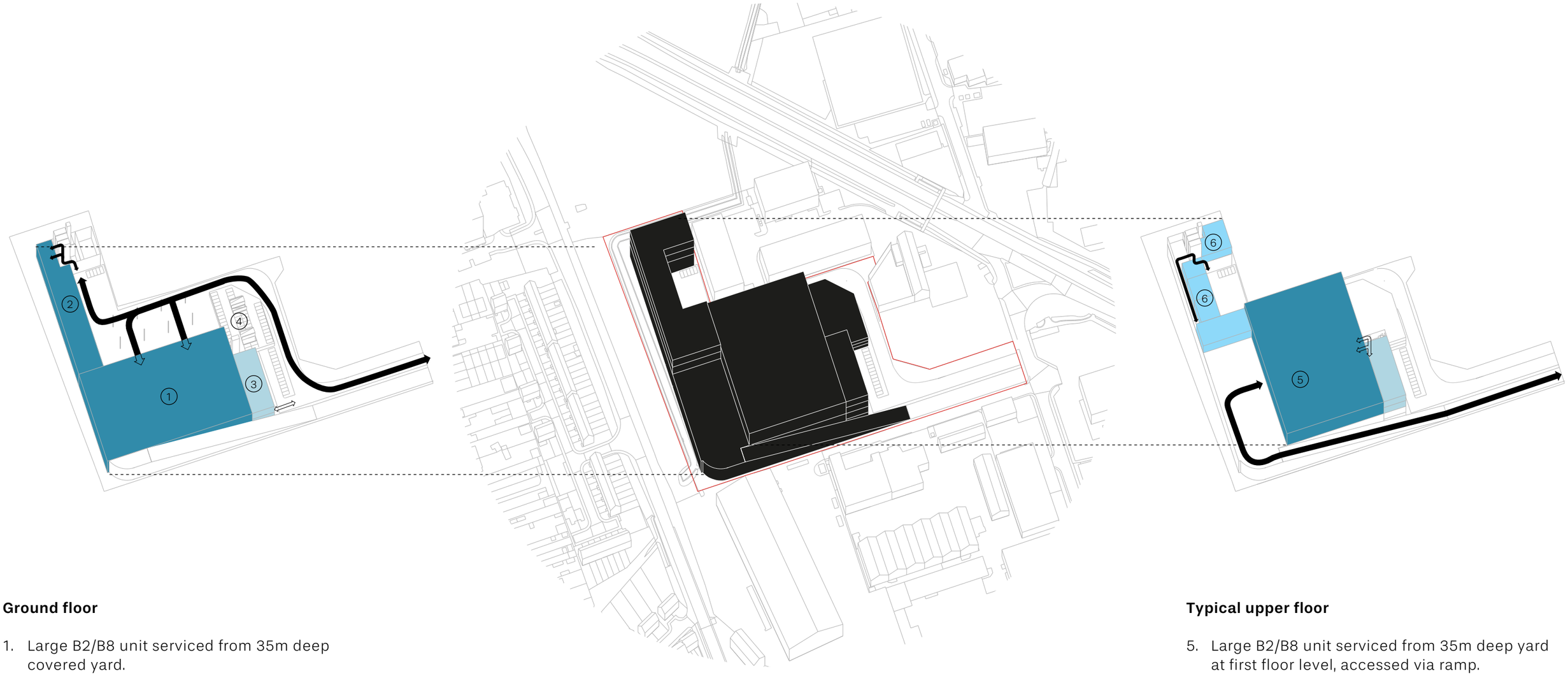
Kaap Noord, Amsterdam

- Mix of workspace typologies accomodated on site.
- Ramps provide roof level parking and servicing to first floor units.

Hilanderas, Irun

- Multi–storey light industrial building.
- Makes use of topography to provide vehicular access to upper storey.
- Internalising the circulation within the site enables the building to form site boundary on three sites.

Typologies
Adjacent Workshop and Stacked Warehouse



Ground floor

1. Large B2/B8 unit serviced from 35m deep covered yard.
2. Small B2/B8 unit serviced with yard providing service access to goods lifts for access to upper storeys.
3. Ancillary office with visual connection to site entrance.
4. Multistorey employee car park with direct access into ancillary office and units.

Typology Density

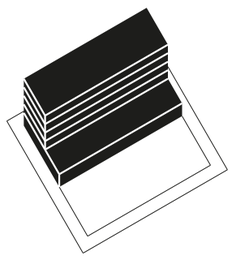
8,800 m² employment floorspace per ha

E(g)i NIA	2,648 m²	E(g)i density	1,050 m² per ha
E(g)iii NIA	2,438 m²	E(g)iii density	970 m² per ha
B2/B8 NIA	14,839 m²	B2/B8 density	5,890 m² per ha
Ext. Operational Area	7,140 m²		

Typical upper floor

5. Large B2/B8 unit serviced from 35m deep yard at first floor level, accessed via ramp.
6. Small E(g)iii units serviced by 2no. goods lifts.

Typologies
Stacked Workshop and Residential



Dimensions	
Area	Typical employment floorplate dimensions – 20 x 40m Typical residential floorplate dimensions – 16 x 24m
Height	Ceiling height – 4–8m

Access and Servicing	
Yard space	LGV Access – 16m deep yard HGV Access – Single 27m deep shared loading bay serving all units
Multi–storey requirements	N/A
Residential mix requirements	Operating hours of external spaces such as yards should be determined. Acoustic mitigation required between workspace and homes.

Place	
	Optimal orientation allows northern light into studio/workshop spaces and southerly aspect for residential units. Should transition between residential and residential areas. Clear differentiation between workspace and residential entrances.

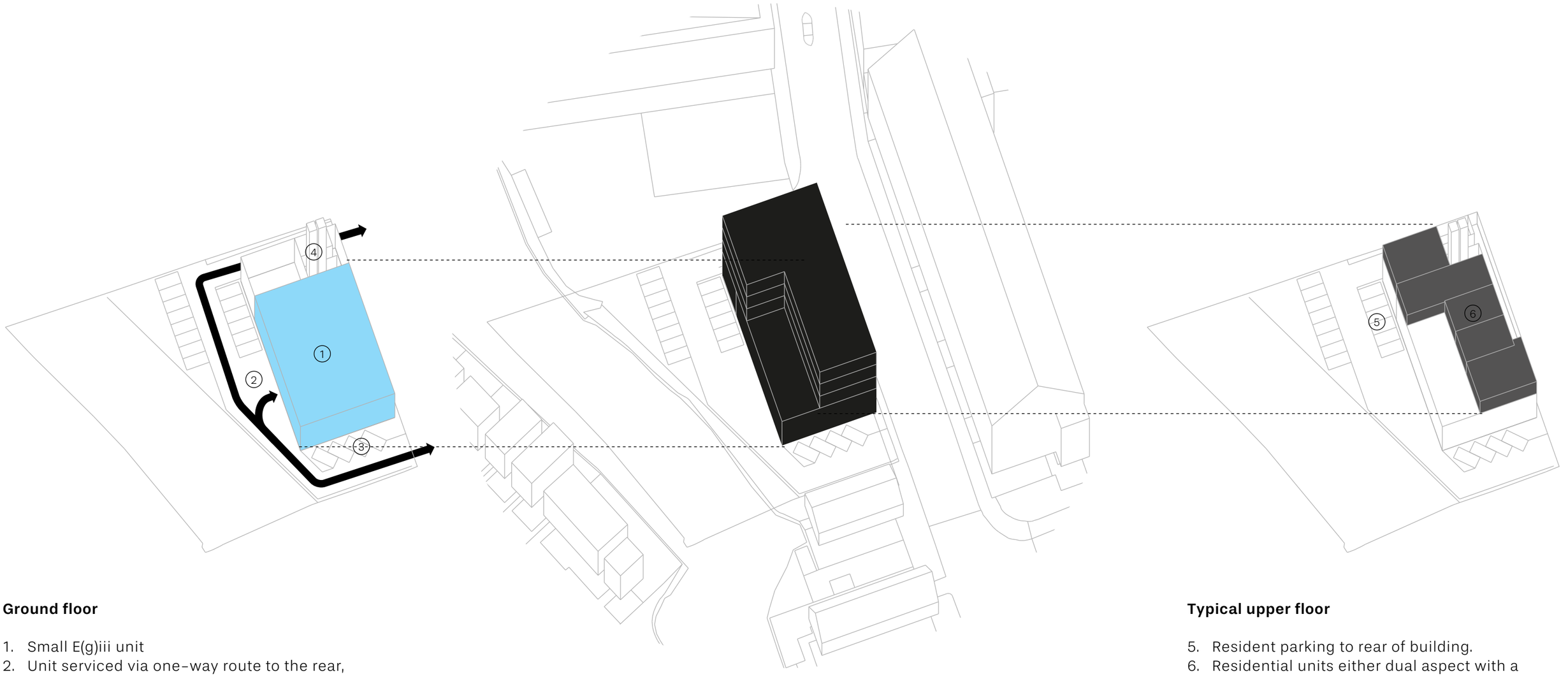
Bow Enterprise Park, Tower Hamlets

- Small E(g)iii workshop units with mezzanine level.
- Workspace lifts homes above and away from adjacent railway line.
- Residential component steps back to avoid overlooking of yard from homes on lower levels.
- Circular, full forward gear access route for LGVs through site.

Iceland Wharf, Tower Hamlets (Planning Granted)

- Mix of E(g)i, E(g)iii and B2 transitions between retained SIL and residential at ground floor across the site.
- Mix of uses enables the retention of existing heritage assets and ensures their future use as workspace.
- Multi–storey B2 component enabled by goods lift serving 5 floors.
- Visual permeability from the street celebrates industrial activity inside.
- Circular, full forward gear access route for LGVs through site.
- Massing separates working service yard, workspace amenity space and residential courtyards.

Typologies
Stacked Workshop and Residential



Ground floor

1. Small E(g)iii unit
2. Unit serviced via one-way route to the rear, enabling unit to create a positve frontage onto street.
3. Employee parking and entrance to workspace.
4. Residential core separated from workspace entrance.

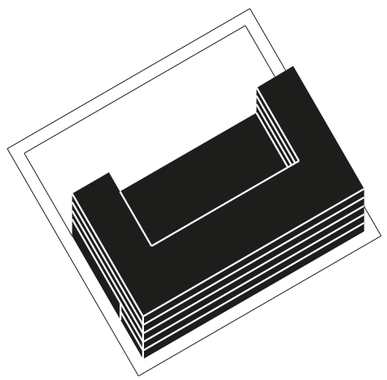
Typology Density
6,360 m² employment floorspace per ha

E(g)iii NIA	389 m²	E(g)iii density	2,890 m² per ha
C3 NIA	1202 m²	C3 density	91 units per ha
Ext. Operational Area	450 m²		

Typical upper floor

5. Resident parking to rear of building.
6. Residential units either dual aspect with a primary access avoiding direct view of yard and parking or stepped back at first floor to mask direct view of yard.

Typologies
Stacked Warehouse and Residential



John Jones, Haringey

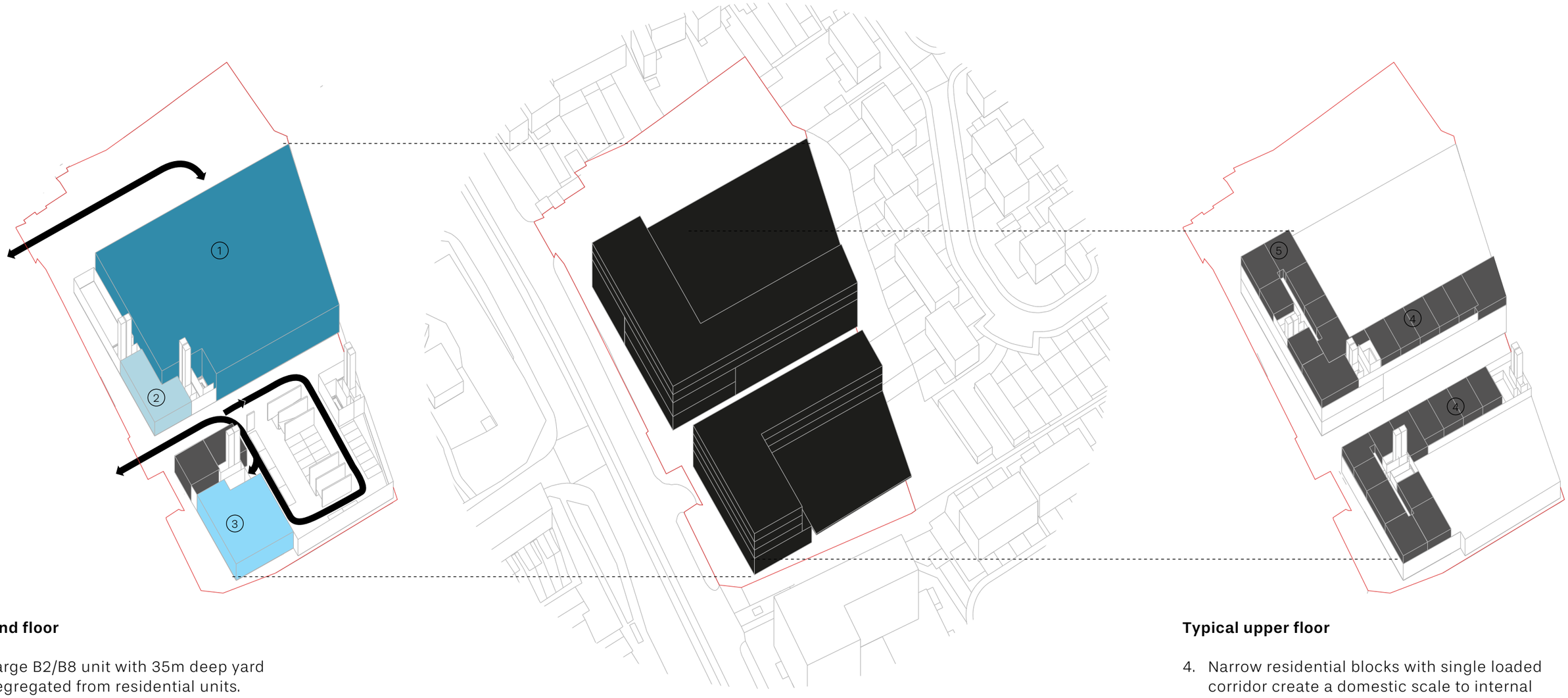
- Light industrial space at ground floor, wrapped with office space with residential and student residential units above.
- Covered yard and roof of industrial units create amenity space.

Dimensions	
Area	Typical medium industrial floor plate dimensions – 40 x 80m
Height	Ceiling height medium industrial –6–8m

Access and Servicing	
Yard space	HGV Access – Single 27m deep loading bay serving all units
Multi–storey requirements	N/A
Residential mix requirements	Operating hours of external spaces such as yards should be determined. Acoustic mitigation required between workspace and homes.

Place	
	Should transition between residential and residential areas. Clear differentiation between workspace and residential entrances, utilising different sides of site.

Typologies
Stacked Warehouse and Residential



Ground floor

1. Large B2/B8 unit with 35m deep yard segregated from residential units.
2. Ancillary office component creates active frontage and combines with residential entrances to form an internal street with domestic character to mitigate against the hostile nature of adjacent roads.
3. Small E(g)iii unit serviced via underground car park to rear, enabling workspace to create active frontage.

Typology Density
7,140 m² employment floorspace per ha

E(g)i NIA	380 m²	E(g)i density	410 m² per ha
E(g)iii NIA	389 m²	E(g)iii density	420 m² per ha
B2/B8 NIA	2706 m²	B2/B8 density	2,910 m² per ha
C3 NIA	3365 m²		
Ext. Operational Area	2,830 m²		

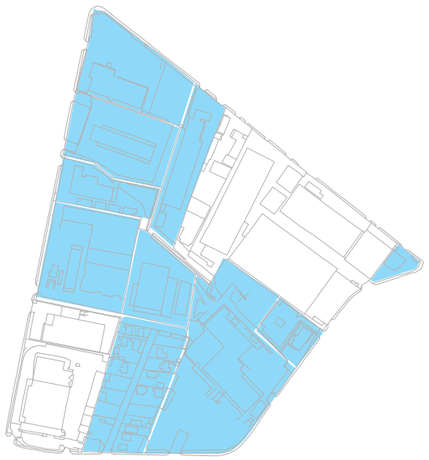
Typical upper floor

4. Narrow residential blocks with single loaded corridor create a domestic scale to internal street.
5. Residential units either dual aspect with a primary access avoiding direct view of yard and parking or stepped back at first floor to mask direct view of yard.

Application of capacity studies to sites
Method

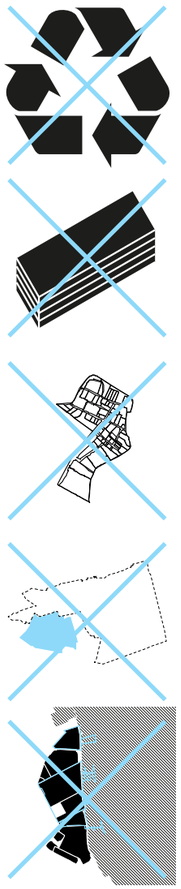
Intensification Sites

Sites with an existing plot coverage below 40% are identified as suitable for intensification.



Exclusions – strategy

From these sites, some are excluded based on conditions that make delivery of intensified industrial types likely to be undesirable. Utilities uses, offices, sites in Crayford Ness, non SIL/LSIS sites and safeguarded wharves are excluded

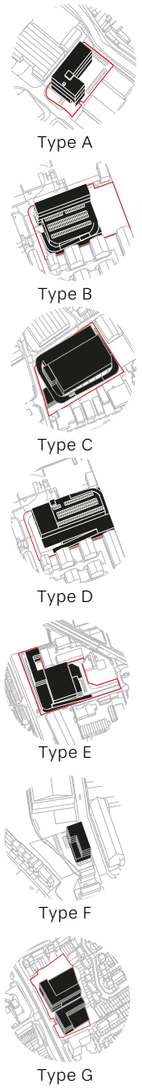


Exclusions – delivery

Additional sites are excluded based on conditions that make intensified industrial types likely to be undeliverable. Those with new buildings or recent consents and irregularly shaped sites are excluded.

Suitable Type

The remaining sites are categorised based on their suitability to support each type (see page 85). These are applied based on the assumption that the market will deliver the largest units possible on any given site.



Viability
Type Summary

The viability appraisals for the typologies is summarised in the table opposite. The assumption used in these appraisals is summarised in the appendix to this report.

These appraisals show that two of the industrial typologies are viable.

One of the co-location typologies is viable with 0% affordable housing. As this type would neither generate additional employment capacity nor be policy compliant in terms of affordable housing the two co-location typologies are not taken forward as part of the capacity tests.

The table below summarises the viability of types on cleared vacant land, showing that all types are viable on such sites. Whilst this suggests potential capacity exists on cleared vacant sites, the plot ratio threshold at which types would be viable would enable to identification of more sites in the borough with low plot ratios. Identification of this threshold is set out on the following page.

Benchmark land value – existing secondary industrial 30% plot ratio

	Type	RLV	BLV	Surplus/Deficit
A	Multi-storey workshop	£2,362,562	£1,543,487	£819,075
B	Adjacent workshop and warehouse	£1,929,139	£3,654,837	-£1,725,698
C	Stacked warehouse (small)	£3,719,993	£3,663,630	£56,363
D	Stacked warehouse (large)	£6,521,447	£6,849,522	-£328,075
E	Adj. workshop and stacked warehouse	£4,387,087	£9,238,209	-£4,851,122
F	Stacked workshop and residential *	£717,955	£666,048	£51,907
G	Stacked warehouse and residential *	£2,855,514	£3,402,413	-£546,899

* Residential co-location types tested with 0 % affordable housing

Benchmark land value – undeveloped land

	Type	RLV	BLV	Surplus/Deficit
A	Multi-storey workshop	£2,362,562	£155,881	£2,206,681
B	Adjacent workshop and warehouse	£1,929,139	£369,112	£1,560,027
C	Stacked warehouse (small)	£6,521,447	-	-
D	Stacked warehouse (large)	£3,719,993	£691,752	£5,829,695
E	Adj. workshop and stacked warehouse	£4,387,087	£932,992	£3,454,095
F	Stacked workshop and residential*	£717,955	£67,266	£650,689
G	Stacked warehouse and residential*	£2,855,514	£343,619	£2,511,895

* Residential co-location types tested with 0 % affordable housing

Viability
Sensitivity Testing Summary

A number of sites in the borough have very low plot ratios due to the prevalence of yard based activities in the borough.

The table opposite identifies a threshold for plot ratios at which each type is viable. As type A is viable at higher plot ratios, this type is not included in this analysis.

The thresholds defined here are used in constraining the selection of potential intensification sites.

B – Adjacent workshop and warehouse
RLV = £1,929,139

Plot Ratio	BLV	Surplus/Deficit
BLV @ 35 %	£4,274,235	-£2,345,096
BLV @ 30 %	£3,663,630	-£1,734,491
BLV @ 25 %	£3,053,025	-£1,123,886
BLV @ 20 %	£2,442,420	-£513,281
BLV @ 15 %	£1,831,815	£97,324
BLV @ 10 %	£1,221,210	£707,929
BLV @ 5 %	£610,605	£1,318,534

D – Stacked warehouse
RLV = £6,521,447

Plot Ratio	BLV	Surplus/Deficit
BLV @ 35 %	£7,992,819	-£1,471,372
BLV @ 30 %	£6,850,988	-£329,541
BLV @ 25 %	£5,709,157	£812,291
BLV @ 20 %	£4,567,325	£1,954,122
BLV @ 15 %	£3,425,494	£3,095,953
BLV @ 10 %	£2,283,663	£4,237,785
BLV @ 5 %	£1,141,831	£5,379,616

C – Stacked warehouse (small)
RLV = £3,719,993

Plot Ratio	BLV	Surplus/Deficit
BLV @ 35 %	£4,274,235	-£554,242
BLV @ 30 %	£3,663,630	£56,363
BLV @ 25 %	£3,053,025	£666,968
BLV @ 20 %	£2,442,420	£1,277,573
BLV @ 15 %	£1,831,815	£1,888,178
BLV @ 10 %	£1,221,210	£2,498,783
BLV @ 5 %	£610,605	£3,109,388

E – Adjacent workshop and warehouse
RLV = £4,387,087

Plot Ratio	BLV	Surplus/Deficit
BLV @ 35 %	£10,771,072	-£6,383,985
BLV @ 30 %	£9,232,348	-£4,845,261
BLV @ 25 %	£7,693,623	-£3,306,536
BLV @ 20 %	£6,154,898	-£1,767,811
BLV @ 15 %	£4,616,174	-£229,087
BLV @ 10 %	£3,077,449	£1,309,638
BLV @ 5 %	£1,538,725	£2,848,362

Viability
Sensitivity Testing Summary

Additional sensitivity testing for rents has also been undertaken, summarised in the table opposite.

Benchmark land value – existing secondary industrial 30% plot ratio

	Type	£175psm	£180psm	£185psm	£190psm	£195psm	£200psm	£205psm	£210psm
A	Multi-storey workshop	£2,362,562	£2,611,069	£2,859,574	£3,108,081	£3,356,588	£3,605,093	£3,853,600	£4,102,107
B	Adjacent workshop and warehouse	£1,929,139	£2,282,594	£2,636,049	£2,989,504	£3,342,959	£3,696,414	£4,049,869	£4,403,323
C	Stacked warehouse (small)	–	–	–	–	–	–	–	–
D	Stacked warehouse (large)	£6,521,447	£7,356,664	£8,191,879	£9,027,095	£9,862,311	£10,697,527	£11,532,743	£12,367,959
E	Adj. workshop and stacked warehouse	£4,387,087	£5,412,682	£6,438,277	£7,463,873	£8,489,468	£9,515,063	£10,540,658	£11,566,253
F	Stacked workshop and residential *	£1,093,318	£1,131,554	£1,169,791	£1,208,026	£1,246,262	£1,284,497	£1,322,734	£1,360,969
G	Stacked warehouse and residential *	£4,136,632	£4,373,817	£4,611,004	£4,848,189	£5,085,376	£5,322,562	£5,559,747	£5,796,934

* Residential co-location types tested with 0 % affordable housing

Viability
Developer Profit

Opportunities for intensification in the borough may exist where owner-occupiers redevelop sites to accommodate growing businesses.

In these cases the incentive to intensify sites would not be developer profit but the needs of individual occupiers.

As such the removal of developer profit has also been tested, summarised opposite. Although this cannot be used to identify potential industrial capacity in this study as land owner data is not available, it may be used to identify intensification opportunities through ongoing landowner engagement.

Benchmark land value – existing secondary industrial 30% plot ratio

	Type	RLV – 15% profit on GDV	RLV – no profit	BLV @ 35% plot ratio	BLV @ 30% plot ratio	Surplus/Deficit against BLV @ 35%	Surplus/Deficit against BLV @ 30%
A	Multi-storey workshop	£2,362,562	£3,897,454	£1,800,735	£1,543,487	£2,096,719	£2,353,966
B	Adjacent workshop and warehouse	£1,929,139	£4,236,015	£4,263,977	£3,654,837	-£27,962	£581,177
C	Stacked warehouse (small)	£3,719,993	£7,158,402	£4,263,977	£3,663,630	£2,894,425	£3,503,565
D	Stacked warehouse (large)	£6,521,447	£11,977,027	£7,991,110	£6,849,522	£3,985,917	£5,127,504
E	Adj. workshop and stacked warehouse	£4,387,087	£11,303,587	£10,777,911	£9,238,209	£525,676	£2,065,377
F	Stacked workshop and residential *	£195,900	£432,062	£777,056	£666,048	-£344,994	-£233,986
G	Stacked warehouse and residential *	£1,157,902	£2,730,633	£3,969,482	£3,402,413	-£1,238,849	-£671,780

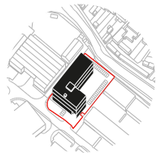
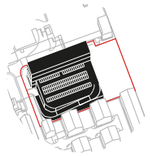
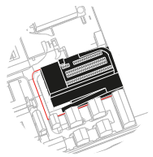
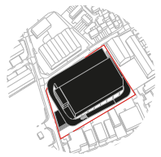
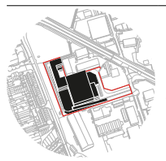
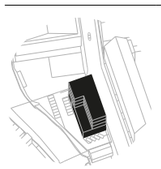
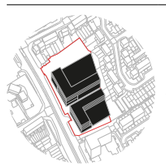
* Residential co-location types tested with 50 % affordable housing

Intensification Capacity
Site Identification Method

This table sets out the constraints for each typology in applying the potential capacities to sites.

Geometric constraints are defined by critical parameters such as lengths of ramps, vehicle turning radii and yard depths.

Plot ratio thresholds reflect the findings of viability appraisals set out in previous sections.

	Type	Site Area (Ha)	Site Characteristics	PTAL	Plot Ratio Viability Threshold	Plot Ratio Viability Threshold – No profit	Notes
	Multi-storey workshop	0.2 – 0.65	Min 45m in short dimension	2 +	–	–	–
	Adjacent workshop and warehouse	0.65 – 1.2	Min 100m in long dimension	1b +	15%	30%	–
	Stacked warehouse (small)	0.85 – 1.2 +	Min 115m in long dimension	–	30%	–	–
	Stacked warehouse (large)	1.2 +	Min 150m in long dimension	–	25%	–	Additional developable area deduction made on very large sites for internal circulation
	Adj. workshop and stacked warehouse	1.7 +	Min 160m in long dimension	1b +	10%	–	Additional developable area deduction made on very large sites for internal circulation
	Stacked workshop and residential	–	–	–	–	–	–
	Stacked warehouse and residential	–	–	–	–	–	–

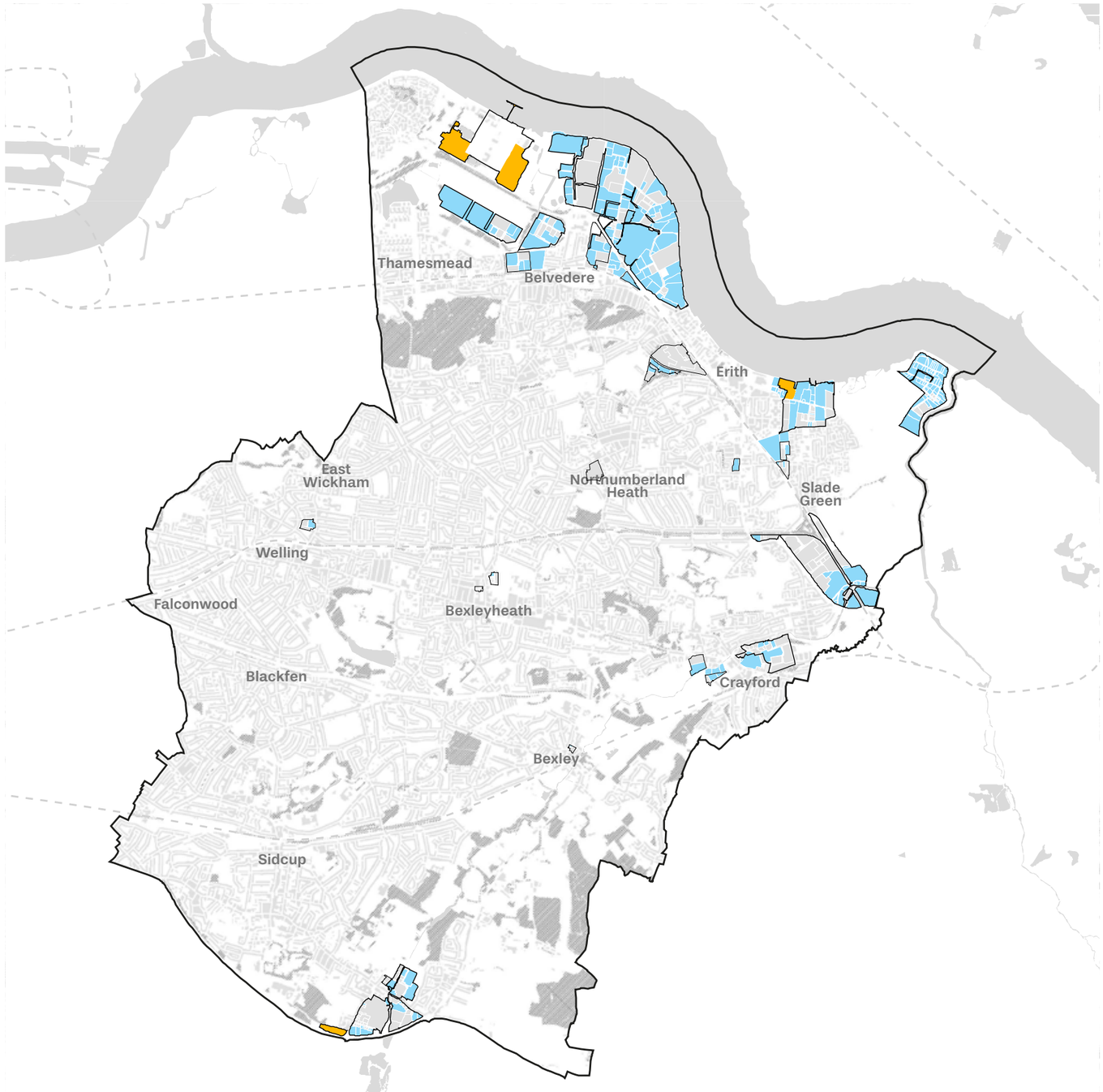
Intensification Capacity
Intensification Sites

All industrial sites with a plot ratio below 40% are considered to be potential intensification sites. Whilst this is higher than the thresholds tested through the viability appraisals it will enable the study to identify where potential industrial capacity exists. Although unviable under current market conditions this capacity could become viable in the future or through cross subsidy from non-industrial development on sites released from SIL/LSIS.

In subsequent calculations of the potential uplift in industrial capacity on each site, existing sites that are cleared and vacant are assumed to have a potential floorspace capacity of 65% the site area. External operational area for these sites is assumed to be an additional 17% of site area. This is based on operational space on sites (both internal and external) at an average ratio of 82% on existing occupied sites across the borough.

These sites are assessed based on the parameters set out on previous pages, in each case applying the potential density of employment spaces to each site area to establish potential floorspace capacity ande external operational area capacity on a site by site basis.

In addition to these sites a number of additional SIL designations have been identified and assessed for their suitability for intensification for employment uses.



Key

- Potential intensification sites
- Proposed additions to SIL (LBB Local Plan Reg 19)

N 0 2km

Intensification Capacity Type

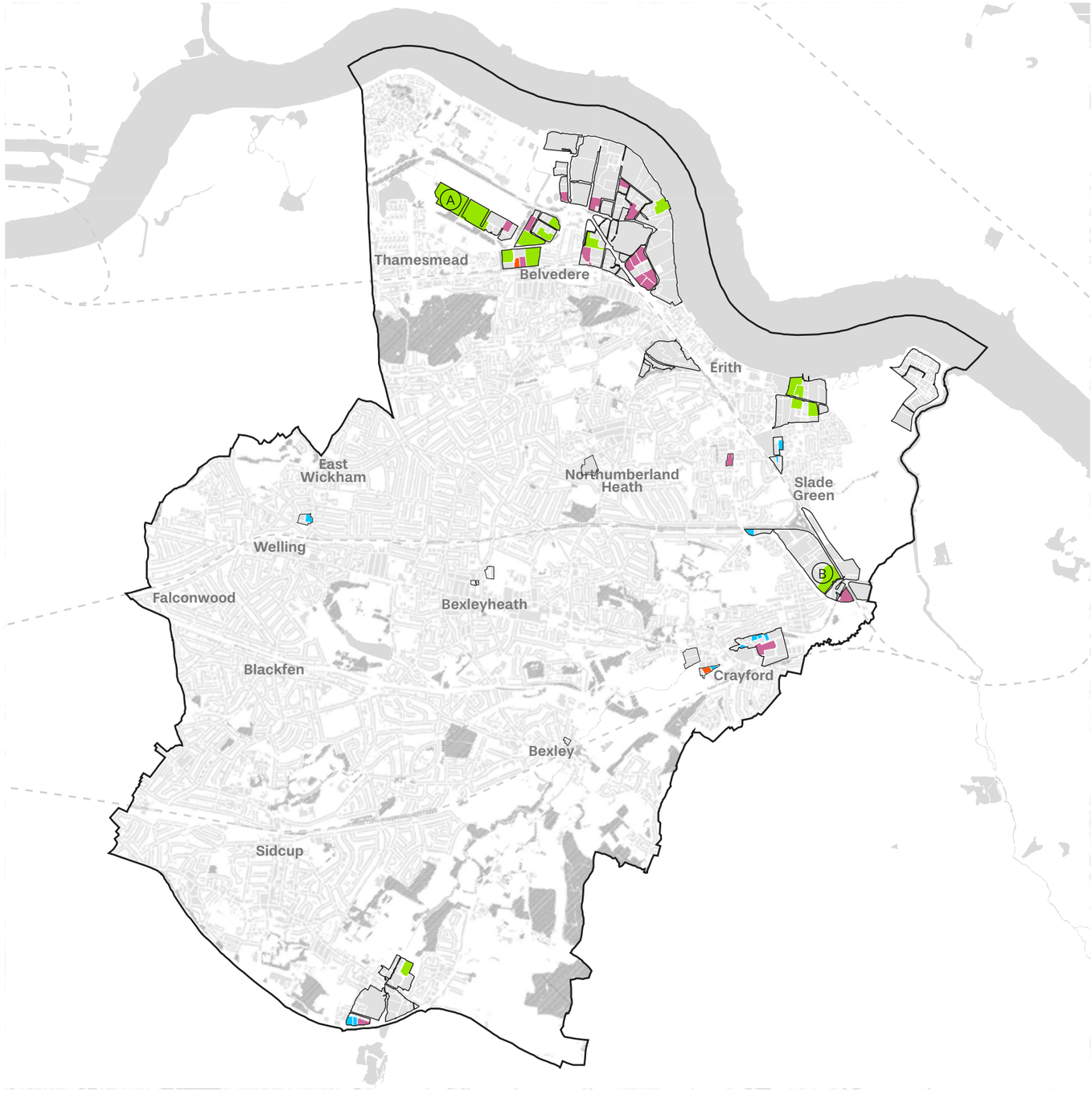
The map opposite and table below summarises the geographical distribution of potential industrial capacity across the borough. The majority of the capacity is generated by the two stacked warehouse typologies.

	Viable Type			Un- Viable Type		
	Net Floorspace	Net Operational Area	Net Industrial Capacity	Net Floorspace	Net Operational Area	Net Industrial Capacity
Type A	34,102	-6,907	26,146	-	-	-
Type B	526	935	1,461	3,574	-2,928	647
Type C	112,141	-14,896	97,245	72,162	-5,601	66,561
Type D	144,365	14,190	158,555	63,686	2,330	66,061
Type E	-	-	-	-	-	-
Total	**291,134**	**-6,678**	**283,407**	**139,423**	**-6,199**	**133,224**

Key

- Type A – Multi-storey workshop
- Type B – Adjacent workshop and warehouse
- Type C – Stacked warehouse (small)
- Type D – Stacked warehouse (large)

N 0 2km



Intensification Capacity
Capacity

The map opposite and table below summarises the geographical distribution of potential industrial capacity across the borough A few large sites contribute a significant quantum of potential industrial capacity:

A Veridion Park
19,200m² Floorspace/27,800m² Operational Space

B SGN Belvedere Gasholder Site
29,700m² Floorspace /14,700m² Operational Space

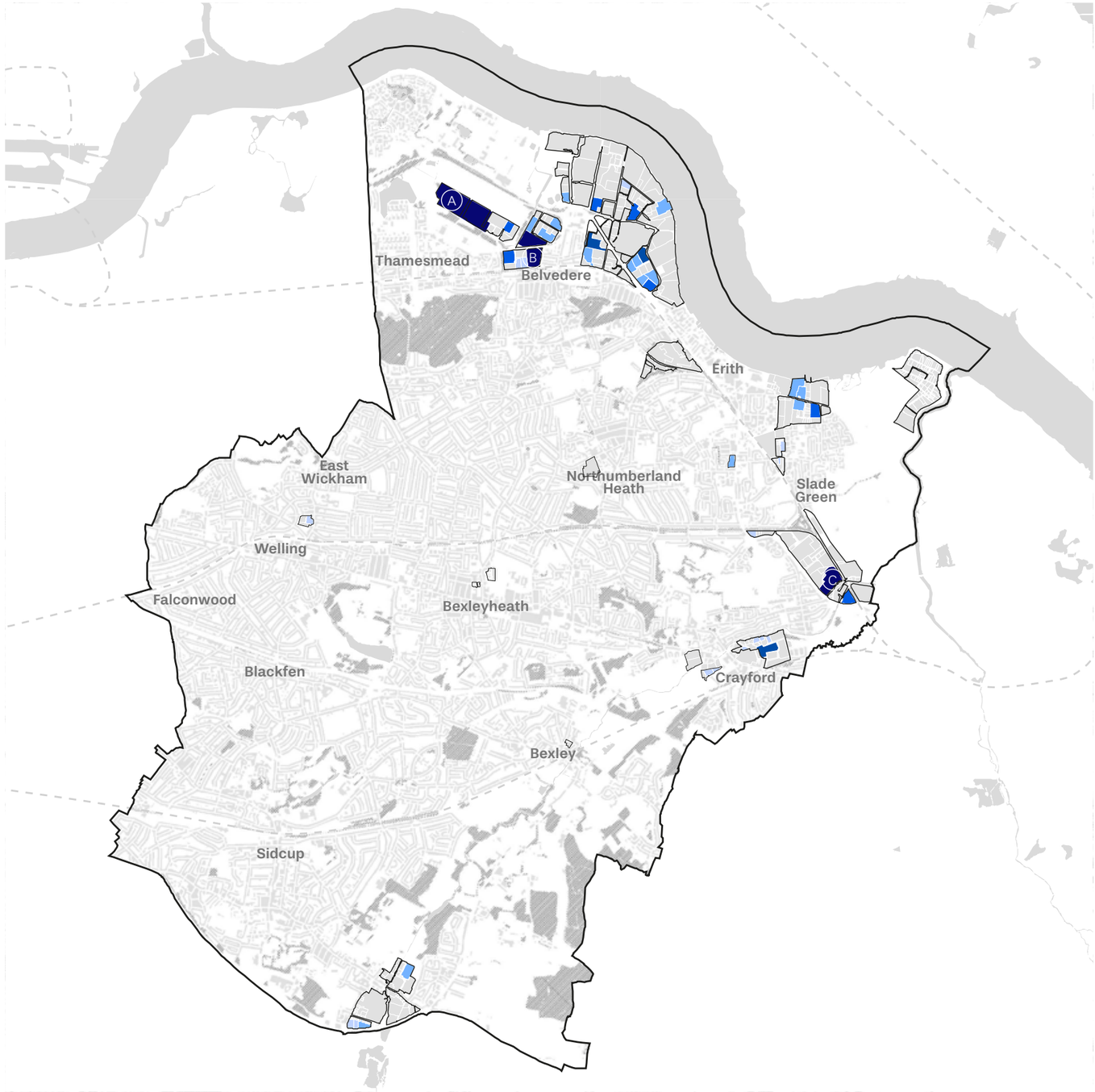
C Vacant site at Thames Road
11,000m² Floorspace/11,400m² Operational Space

	Viable Type			Un- Viable Type		
	Net Floorspace	Net Operational Area	Net Industrial Capacity	Net Floorspace	Net Operational Area	Net Industrial Capacity
Outer Belvedere	113,454	15,895	129,350	36,914	-2,663	34,251
Crayford	11,486	554	10,991	19,885	-2,682	17,203
Erith	74,713	-34,192	40,520	0	0	0
Foots Cray	9,093	3,330	12,423	8,766	-1,953	6,813
Lower Belvedere	61,525	1,919	63,445	61,773	1,912	63,685
Thames Road	16,050	9,532	25,583	12,084	-813	11,271
Welling	4,811	-3,717	1,094	0	0	0
Total	**291,134**	**-6,678**	**283,407**	**139,423**	**-6,199**	**133,224**

Key

- No Change
- < 5,000 sqm
- 5,000 to 10,000 sqm
- 10,000 to 15,000 sqm
- 15,000 to 20,000 sqm
- 20,000 sqm +

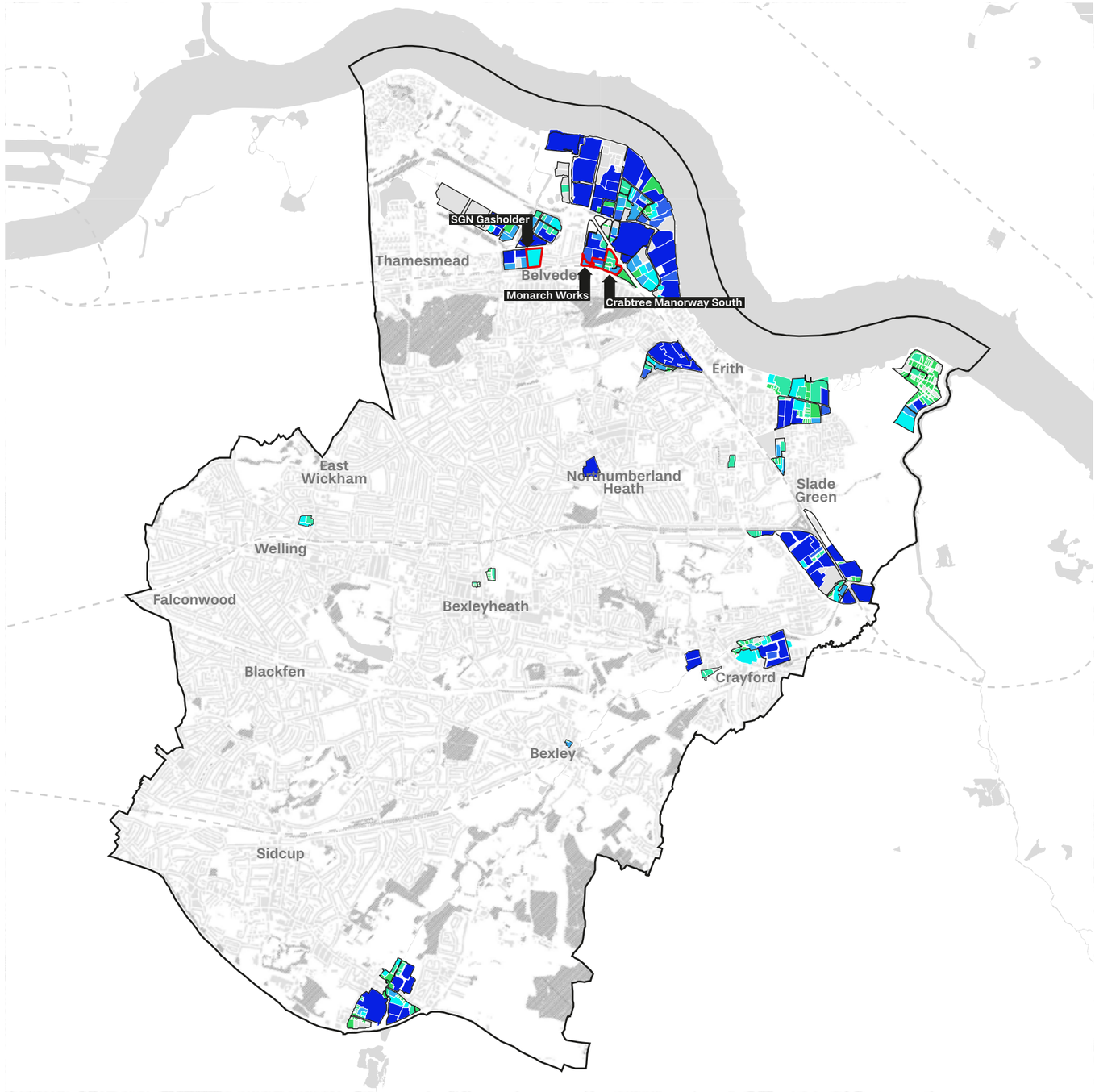
N 0 2km



Intensification Capacity
Potential SIL Release

Site assessments undertaken for the Draft Local Plan identify two sites within SIL that could be appropriate for release, Monarch Works (BV010) and Crabtree Manorway South (BV012) and two sites within LSIS, SGN Gasholder (BV007), and Former Electrobase/ Wheatsheaf Works (CR005). Should these sites be released from their current SIL designation 19,630m^2 of floorpsace would need to be re-provided to ensure no net loss of floorspace capacity. The map to the right shows existing GIA by site.

Site ID	Site/Estate Name	Floorspace	External Operational Area	Total Industrial Space
LSIS				
BV007	SGN Belvedere Gasholders	0	0	0
CR005	Former Electrobase/Wheatsheaf Works	0	0	0
SIL				
BV010	Monarch Works	3,650	2,300	5,950
BV012	Crabtree Manorway South	3,790	5,600	9,390
	Burgess Business Park	1,140	6,800	7,940
	Crabtree Manorway South	1,670	4,260	5,930
	Maybrey Reliance	200	180	380
	Elbourne Trading Estate	2,700	2,430	5,130
	Maybrey Reliance	1,310	860	2,170
	Crabtree Manorway South	870	2,660	3,530
	Capital Industrial Estate	4,300	4,420	8,720
	Total	**19,630**	**29,510**	**51,380**



Key

- 1 - 1,000 sqm
- 1,000 - 2,000 sqm
- 2,000 to 3,000 sqm
- 3,000 to 4,000 sqm
- 4,000 to 5,000 sqm
- 5,000 sqm +

N 0 2km

Intensification Capacity
Intensification Scenarios

Of the potential viable capacity identified 69% would be required to meet future demand and ensure no-net-loss of industrial floorspace should the three sites shown on the previous page be released.

Whilst the potential intensification capacity of sites within the borough is significantly higher than the quantum that would be lost through release of SIL described on the previous page, it should not be assumed that this borough-wide theoretical capacity will be fully deliverable within the plan period.

As such, a number of scenarios for the re-provision of this industrial capacity are set out opposite. Key variables that will impact on which scenario provides intensification over the plan period include:

- the role played by very large sites in providing significant increases in industrial capacity
- 'proof of concept' for particular typologies that encourage take up of space and developer interest
- changing market demand for different types of industrial units
- clustering effects through general improvement to the quality of environment and/or infrastructure investment in specific areas

These scenarios show that a intensification through a variety of sources would be required, and therefore the interventions required should be varied and complementary.

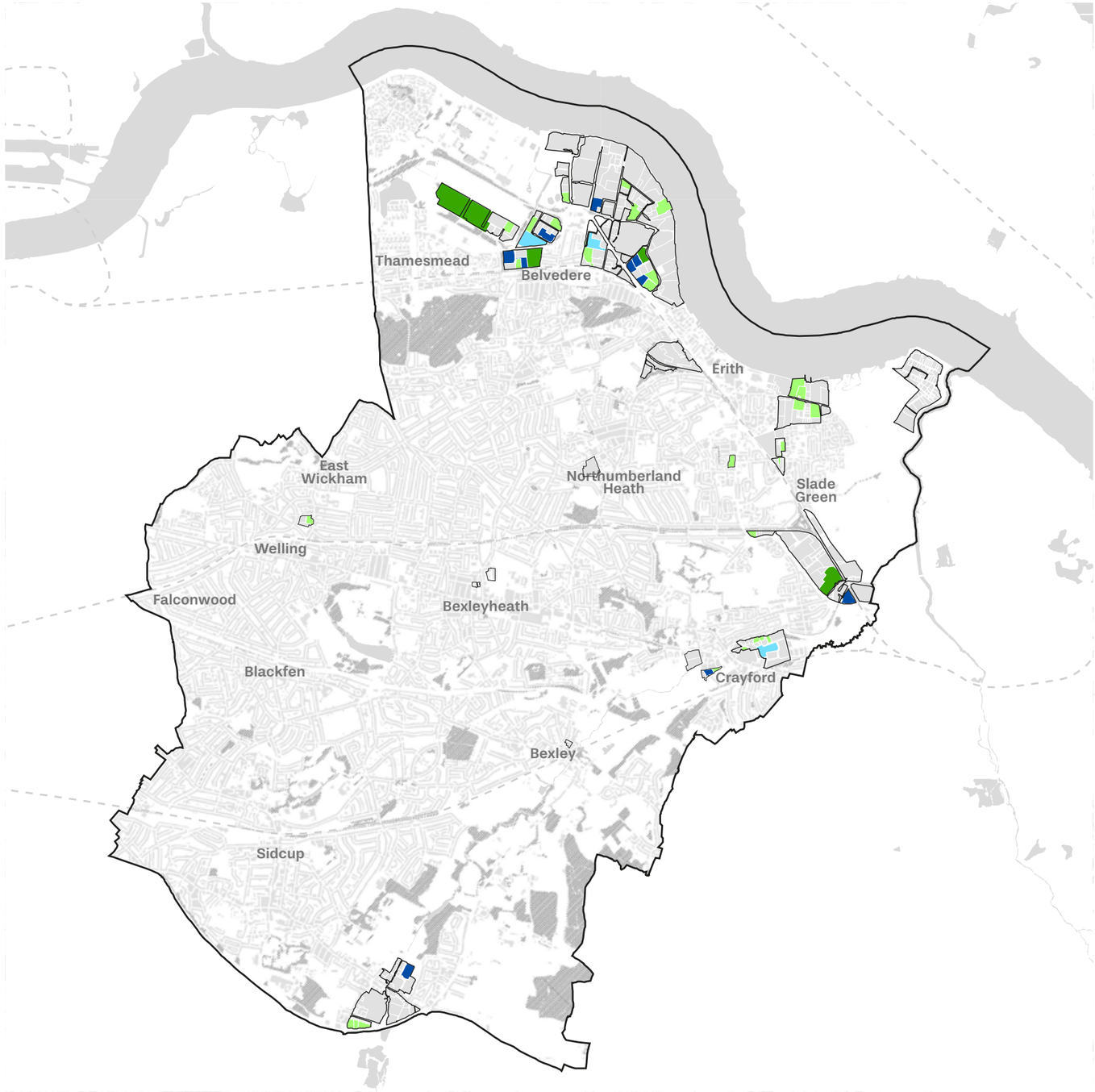
	Proportion of net capacity required to meet future demand and compensate potential release		Intervention
	Source	Floorspace capacity (viable types only)	
Scenario 1 **Coordination of very large sites** Veridion Park and Thames Road sites deliver uplift in capacity as identified in this strategy	Veridion Park and Thames Road	**671%** of net floorspace would be required to meet future demand and ensure no-net-loss of industrial capacity.	Working pro-actively with landowners, develop site allocations for Veridion Park and Thames Road setting design principles and minimum quantum of floorspace.
Scenario 2 **No coordination of very large sites** Lack of landowner engagement means no net capacity delivered on Veridion Park and Thames Road sites.	Smaller in-tensification sites	**78%** of the net floorspace capacity generated on smaller intensification sites would be required to meet future demand and ensure no-net-loss of industrial capacity.	Ensure planning officers have access to list of sites identified in this strategy. Make a summary of typolo-gies available to planning officers for use in pre-appli-cation discussions. Update design guidance to identify suitable types for sites.
Scenario 3 **No large units on upper storeys** Viability of larger stacked warehouse typologies undermined by willingness of occupiers to take space on upper storeys	Typologies A, B and C	**138%** of the net floorspace capacity generated through smaller intensification types would be required to meet future demand and ensure no-net-loss of industrial capacity.	Update design guidance to ensure sites in areas of good transport accessibility levels are optimised with typologies incorporating high density employment. Ensure planning officers have access to information described above.
Scenario 4 **Outer Belvedere only** Sites in Outer Belvedere intensify at capacity identified in this strategy	Outer Belvedere	**179%** of the net floorspace capacity in Outer Belvedere would be required to meet future demand and ensure no-net-loss of industrial capacity.	Develop area strategies through Belvedere Design Pilot, Bexley Riverside OAPF and C2E masterplanning that assess impact on infrastructure and coordination of intensification across the area.
Scenario 5 **Erith only** Sites in Erith intensify at capacity identified in this strategy	Erith	**271%** of the net floorspace capacity in Erith would be required to meet future demand and ensure no-net-loss of industrial capacity.	Develop area strategies through Bexley Riverside OAPF and C2E masterplanning that assess impact on infra-structure and coordination of intensification across the area.

Intensification Capacity
Site Rank

The map opposite summarises the geographical distribution of potential industrial intensification sites across the borough.

These sites are ranked into four categories based on their capacity for intensification and the viability of the industrial type that suits the site's characteristics.

The two green categories are the most suitable types for industrial intensification in the borough. Whilst these sites are suitable for industrial intensification, they may also be well suited to other forms of development and this balance should be taken into account when drawing further conclusions based on this strategy.



Key

- High capacity viable type
- Low capacity viable type
- High capacity unviable type
- Low capacity unviable type

N 0 2km

Delivery Recommendations

Landowner engagement

The potential for significant uplift on a few key sites should be the focus of further work. The opportunity offered by working closely with relatively few landowners should be exploited through, pro-active engagement to ensure these sites are optimised.

Engagement on the future of Veridion Park in particular should be a focus with Peabody, exploring the potential to update the Thamesmead Commercial and Industrial Masterplan.

Due to the significant uplift potential of specific areas, any potential constraints due to existing infrastructure capacity on these large sites should be identified. This should form an important part of the Belvedere Intensification Pilot.

Optimising capacity through the development management process

Ensure sites are optimised through appropriate design guidance. The characteristics that make sites suitable for intensification should be reflected in the forthcoming Design Guide SPD and Local Plan as appropriate.

Particular parameters should be referred to in order to ensure developers are required to optimised their sites. This should follow the site characteristics set out on page 85 and include:

- Low existing plot ratios
- Regular shape of plot
- Site dimensions that could support multistorey typologies – 115m for small stacked warehouses, 150m for large stacked warehouses
- Multistorey stacked workshops should be encouraged on small sites with PTAL of 2 and above.

Applications on sites meeting these criteria must demonstrate that intensive typologies have been tested robustly.

Due to the physical scale of the typologies identified as viable and with the potential to increase capacity, additional guidance should be set out in the Design Guide SPD regarding how very large buildings should be designed. Architectural strategies for successfully resolving the design issues with very large buildings should be developed through the Belvedere Intensification Pilot.

Area strategies

The Local Plan should identify areas that are suitable for intensification as follows:

- Outer Belvedere on large sites with low (<40%) existing plot ratios
- Sites in Crayford SIL along the River Cray. The potential for a high density cluster of employment should be encouraged, taking advantage of access to local services and infrastructure and the placemaking opportunities of the riverside location and existing industrial heritage assets.
- Large sites along Manor Road in Erith. Land assembly should be encouraged in this location to create more efficient development sites that create opportunities for a continuous riverside path.
- Sites to the south of Powercroft Road in Foots Cray. Site assembly should be encouraged in this location to create more efficient development sites.

The Belvedere Industrial Intensification Pilot, Bexley Riverside OAPF and masterplanning associated with the C2E connectivity study should identify place specific opportunities to make employment areas attractive to potential occupiers, particularly those where significant intensification opportunities exist. This should encompass access and public transport, quality of public realm and employee amenity and movement of goods.

The spatial strategy in the Local Plan should consider the specific opportunities for intensification identified in this strategy alongside opportunities for other land uses when preparing site allocations and land use strategies.

Identify more sites

The potential for additional sites to be deliverable based on the typologies developed through this strategy should also be explored further.

The impact of developer profit on viability means that owner occupiers who are looking to expand may be able to do so without relocation through intensive industrial typologies. Ongoing engagement with owners in the borough's industrial locations should promote intensification of existing sites, which may be sites that haven't been identified in this strategy.

Similarly, opportunities for land assembly may also open up opportunities on sites that have been discounted in this strategy due to their irregular shape.

Whilst new build co-location proved to be an undesirable form of intensification for the purposes of this study opportunities may exist through the partial redevelopment and infill of existing stock. Although not likely to generate significant uplift in industrial capacity, the economic and placemaking benefits of this should be explored through future area-based strategies.

The Local Plan should investigate opportunities for the designation of additional SIL/LSIS in the borough, particularly where this is contiguous with existing SIL/LSIS.

Appendices
Viability Appraisal Assumptions and Methodology

Bexley Industrial Land Study
Viability testing: assumptions

Introduction

BNP Paribas was commissioned by LB Bexley to undertake viability testing of industrial typologies. The initial draft report was submitted in March 2020. The findings informed revisions to the typologies, one of which was subsequently tested. Additional sensitivity testing was conducted in April and May 2020.

Methodology

The testing methodology followed standard development appraisal conventions. The industrial development typologies were appraised on sites across the Borough at two benchmark land values: existing use (industrial) and vacant. For each typology and each site, a total scheme value was calculated, based on the capital value of the rental income allowing for rent free periods and purchaser costs. The model then deducted the total scheme costs, including build costs, fees, interest, planning obligations and CIL, and developer profit. The difference between the total scheme value and total scheme costs was the residual amount. If a proposal generated sufficient positive land value in excess of the existing use value, it was considered to be viable.

The initial findings were subject to sensitivity testing which explored alternative appraisal assumptions which more closely reflected local property conditions, including on plot ratio coverage of existing uses and on owner-occupier trends.

Appraisal assumptions

The methodology's assumptions are key factors in determining whether the study is realistic. All assumptions were robustly evidenced, using locally-based sites and assumptions that reflect local market and planning policy circumstances.

This document sets out the relevant assumptions for the industrial typologies. The values set out are for office and industrial only and the costs are only those applied to commercial development. The assumptions related to residential development are not set out here.

Values

Rents and yields for commercial development

Commercial floorspace	Rent per square metre	Investment yield	Rent free period (months)
Office	£150	7.00%	12
Industrial and warehousing	£175	5.00%	3

These assumptions are informed by 56 lettings of similar floorspace in the area between February 2018 to February 2020; these are listed in detail in the "Commercial rents" document. The industrial lettings were all located in the borough's industrial centres of Belvedere, Crayford and Erith, with two lettings in Sidcup. The appraisals assumed 3 month's rent free for industrial floorspace.

Costs

Build costs

Type of development	BCIS cost	Base cost	External works	Total (before policy costs)
Offices	320 Offices generally	£2,200	10%	£2,420
B2 industrial	282 Factories generally	£1,092	10%	£1,201
B8 storage and warehousing	284 Warehouses/ stores	£995	10%	£1,095

Build costs are from the RICS Building Cost Information Service (BCIS), which was based on tenders for actual schemes. The BCIS data is listed in the "BCIS" document. The base costs are adjusted for local circumstances using the established BCIS multiplier; the index for Bexley was 126 indicating that tenders are 26% higher than the national average. This index is typical for London boroughs.

These base build costs were then amended to account for other requirements which will increase build costs. These include:

- external works –10% for office and industrial uses (as shown in the costs table above) to account for external works including car parking spaces
- land remediation and other contingency – 5% increase to base build costs to allow for site-specific issues such as land contamination and associated remediation on industrial sites
- BREEAM – 2% increase to base build costs for commercial development for extra-over costs of achieving BREEAM 'excellent' standard 14 and 'excellent' standard in relation to water efficiency
- Abnormal costs – although there is no additional increase, average level of costs for abnormal ground conditions and some other 'abnormal' costs are already reflected in BCIS data because these costs are frequently encountered on sites that form the basis of the BCIS data sample

Taking into account the additional costs, adjusted build costs were:
Offices: £2,244 psm (£208 psf)
B1(c): £1,114 psm (£104 psf)
B2/B8: £1,105 psm (£103 psf)

Professional and development fees

The appraisals incorporated a 10% allowance for fees for professional services procured throughout the development process, such as architects, valuers, highway consultants, etc. An additional allowance of 3% covers marketing costs, including show homes and agent fees, plus 0.5% for sales legal fees.

The appraisals assume that development finance can be secured at a rate of 6%, inclusive of arrangement and exit fees. This figure reflected funding conditions.

CIL and Section 106

Mayoral CIL 2 and Bexley CIL are both payable on industrial development. Bexley falls within the MCIL Band 3, where a CIL of £25 per square metre is levied. The Bexley CIL charge on industrial development is borough-wide at a rate of £10 per square metre. To pre-empt any increase in CIL as the result of the emerging Local Plan, the appraisals also tested alternative CIL per-square-metre rates of £12, £15, £20 and £25.

The appraisal includes an allowance of £15 per square metre to account for Section 106 requirements and an additional allowance of £10 per square metre to account for Section 278 works.

Developers profit

The methodology assumed a profit margin of 15% of private GDV for testing purposes. This figure was accepted to reflect average level of perceived risk for this development type in the borough, based on historical lending/financing and development trends in the region and demand for employment space in Bexley. The assessment's developer profit assumption for industrial development was lower than the profit assumption

Subsequent to the initial viability assessment, sensitivity testing was undertaken with a nil profit assumption. This testing reflects circumstances in which redevelopment of an industrial site is driven not by a profit motive but rather by operational motive, for example where an occupier owns the land and wants to develop it to accommodate an expanding business or different requirements.

Benchmark Land Values

The industrial development typologies were appraised on sites across the Borough at two benchmark land values: existing use (industrial) and vacant.

The industrial land benchmark land value was assumed to be £4.27 million inclusive of notional 20% premium. This was determined based on: 30/35% site coverage; single storey; lower end of the range rent of £65 per square metre; 6 month void and rent free period; lettings agent and legal fees equating to 20% of first year's rent; capital expenditure of £50 per square metre for very modest refurbishment and repairs; 20% premium.

The vacant land benchmark land value was assumed to be £370,000 per gross hectare. This figure was in light of its non-income producing status.

Subsequent to the initial viability assessment, sensitivity testing was undertaken to determine if typologies would be viable where the existing use had a plot coverage lower than 35%. This testing reflects local knowledge that Bexley's industrial uses have much lower plot ratio coverage than the London average, reflecting sectoral needs (for example large turning circles required for storage and distribution) and local conditions (for example low public transport accessibility requiring additional parking).

Appendices
Viability Appraisal Assumptions – Build Costs

£/m2 study

Description: Rate per m2 gross internal floor area for the building Cost including prelims.

Last updated: 29-Feb-2020 00:46

› Rebased to London Borough of Bexley (126; sample 17)

Maximum age of results: Default period

Building function (Maximum age of projects)	£/m² gross internal floor area						Sample
	Mean	Lowest	Lower quartiles	Median	Upper quartiles	Highest	
New build							
282. Factories							
Generally (20)	1,336	308	751	1,092	1,618	5,021	112
Up to 500m2 GFA (20)	1,728	1,093	1,250	1,461	2,163	2,988	13
500 to 2000m2 GFA (20)	1,406	308	818	1,256	1,606	5,021	48
Over 2000m2 GFA (20)	1,170	453	661	933	1,313	2,940	51
282.1 Advance factories							
Generally (15)	1,084	554	758	1,081	1,356	1,933	38
Up to 500m2 GFA (15)	1,324	1,093	1,132	1,287	1,461	1,727	9
500 to 2000m2 GFA (15)	1,066	554	723	1,030	1,380	1,933	20
Over 2000m2 GFA (15)	883	622	667	916	995	1,315	9
282.12 Advance factories/offices - mixed facilities (class B1)							
Generally (20)	1,549	595	931	1,499	1,938	2,988	24
Up to 500m2 GFA (20)	2,636	2,163	-	2,758	-	2,988	3
500 to 2000m2 GFA (20)	1,592	595	1,341	1,664	1,895	2,315	8
Over 2000m2 GFA (20)	1,272	624	802	991	1,721	2,940	13
282.2 Purpose built factories							
Generally (25)	1,500	308	780	1,283	2,154	5,021	71
Up to 500m2 GFA (25)	1,818	931	1,305	1,887	2,318	2,631	6
500 to 2000m2 GFA (25)	1,682	308	873	1,283	2,393	5,021	25
Over 2000m2 GFA (25)	1,339	415	728	1,182	1,814	2,749	40
282.22 Purpose built factories/Offices - mixed facilities (15)	1,185	563	946	1,126	1,325	2,307	24
284. Warehouses/stores							
Generally (15)	1,206	435	733	995	1,420	5,442	51
Up to 500m2 GFA (15)	2,155	780	1,199	1,504	2,547	5,442	8
500 to 2000m2 GFA (15)	1,157	562	860	1,097	1,381	2,037	17
Over 2000m2 GFA (15)	946	435	703	808	1,111	1,844	26
284.1 Advance warehouses/stores (15)	968	549	722	1,054	1,171	1,500	11
284.2 Purpose built warehouses/stores							
Generally (15)	1,279	435	786	979	1,519	5,442	38
Up to 500m2 GFA (15)	2,482	780	1,452	1,936	3,113	5,442	6
500 to 2000m2 GFA (15)	1,132	562	819	979	1,336	2,037	14
Over 2000m2 GFA (15)	992	435	720	876	1,166	1,844	18
284.5 Cold stores/refrigerated stores (25)	1,651	1,124	1,222	1,435	2,234	2,242	5
320. Offices							
Generally (15)	2,397	1,189	1,743	2,200	2,791	7,324	117
Air-conditioned							
Generally (15)	2,629	1,486	1,970	2,426	2,957	7,324	34
1-2 storey (15)	2,299	1,486	1,885	2,121	2,442	4,291	12
3-5 storey (15)	2,736	1,638	1,904	2,384	2,957	7,324	14
6 storey or above (15)	2,861	2,154	2,577	2,735	2,965	4,051	7
Not air-conditioned							
Generally (15)	2,294	1,189	1,669	2,200	2,693	4,177	59
1-2 storey (15)	2,220	1,318	1,579	2,158	2,648	3,902	32
3-5 storey (15)	2,329	1,189	1,744	2,100	2,768	4,177	24
6 storey or above (20)	2,924	2,289	-	3,008	-	3,392	4
342. Shopping centres (25)	1,568	1,373	-	-	-	1,762	2
343. Department stores (40)	1,082	664	-	-	-	1,499	2
344. Hypermarkets, supermarkets							
Generally (30)	1,994	825	1,404	1,793	2,653	3,475	32
Up to 1000m2 (30)	2,089	1,398	-	1,826	-	3,308	4
1000 to 7000m2 GFA (30)	1,982	825	1,306	1,744	2,656	3,475	26
7000 to 15000m2 (30)	1,684	-	-	-	-	-	1
Over 15000m2 GFA (30)	2,240	-	-	-	-	-	1
345. Shops							
Generally (30)	1,821	742	1,063	1,356	2,387	5,144	25
1-2 storey (30)	1,828	742	1,060	1,298	2,432	5,144	24
3-5 storey (30)	1,661	-	-	-	-	-	1
532. Community Centres							
Generally (20)	2,863	1,127	2,244	2,698	3,273	8,347	92
Up to 500m2 GFA							
Generally (20)	3,082	1,127	2,075	2,764	3,501	8,347	39
Steel framed (20)	3,512	1,896	2,424	2,861	3,796	8,347	18
Concrete framed (40)	1,653	-	-	-	-	-	1
Brick construction (20)	2,116	1,127	1,649	2,028	2,294	3,416	13
Timber framed (15)	3,711	3,112	3,333	3,511	4,006	4,677	7
500 to 2000m2 GFA							

Building function (Maximum age of projects)	£/m² gross internal floor area						Sample
	Mean	Lowest	Lower quartiles	Median	Upper quartiles	Highest	
Generally (20)	2,715	1,439	2,336	2,666	3,097	4,287	49
Steel framed (20)	2,756	1,609	2,398	2,679	3,097	4,287	30
Concrete framed (30)	2,632	-	-	-	-	-	1
Brick construction (20)	2,469	1,439	2,182	2,366	2,781	4,245	12
Timber framed (15)	3,018	2,212	2,748	3,029	3,375	3,695	6
Over 2000m2 GFA							
Generally (20)	2,529	2,091	-	2,656	-	2,714	4
Steel framed (30)	2,483	1,740	-	2,656	-	2,881	4
Concrete framed (45)	1,757	-	-	-	-	-	1
Brick construction (45)	1,378	-	-	-	-	-	1
Timber framed (10)	2,714	-	-	-	-	-	1
562.2 Gymnasia, fitness centres, etc (25)	2,515	1,082	1,555	2,246	3,187	4,297	9
810.1 Estate housing							
Generally (15)	1,623	776	1,386	1,566	1,776	5,633	1651
Single storey (15)	1,817	1,028	1,540	1,751	2,047	5,633	272
2-storey (15)	1,572	776	1,372	1,535	1,720	3,347	1266
3-storey (15)	1,647	1,013	1,346	1,601	1,858	3,281	108
4-storey or above (15)	3,403	1,685	2,755	2,992	4,485	5,096	5
810.11 Estate housing detached (15)	2,044	1,217	1,502	1,786	2,135	5,633	21
810.12 Estate housing semi detached							
Generally (15)	1,617	930	1,392	1,578	1,775	2,998	392
Single storey (15)	1,796	1,133	1,520	1,775	2,006	2,998	77
2-storey (15)	1,576	930	1,388	1,540	1,735	2,706	300
3-storey (15)	1,523	1,164	1,212	1,467	1,635	2,349	15
810.13 Estate housing terraced							
Generally (15)	1,671	1,010	1,390	1,579	1,843	5,096	325
Single storey (15)	1,886	1,247	1,567	1,813	2,220	2,690	35
2-storey (15)	1,614	1,010	1,377	1,552	1,797	3,347	239
3-storey (15)	1,665	1,013	1,338	1,584	1,855	3,281	49
4-storey or above (10)	4,791	4,485	-	-	-	5,096	2
816. Flats (apartments)							
Generally (15)	1,904	964	1,592	1,822	2,142	6,451	930
1-2 storey (15)	1,818	1,138	1,541	1,741	2,007	3,363	220
3-5 storey (15)	1,874	964	1,586	1,799	2,121	4,048	614
6 storey or above (15)	2,312	1,408	1,866	2,157	2,496	6,451	93
852. Hotels (15)	2,606	1,521	2,177	2,486	3,097	3,905	20

Appendices
Viability Appraisal Assumptions – Rents

Sign Date	Start Date	Address	City	Floor	Total SF Leased	Rent/SF /Yr	Rent Type	Service	Rent PA	Use	Business Rates/SF/Yr	Business Rates PA	Service Charge	Service Charge PA	Lease Type	Term	Break Date	Review Date	Expiry Date	Tenant	Lease Status	Deal Type	Move-in Date	Rent Free	Leasing Agent Company	Lease Comp ID	Asking Rent/SF/Yr	Asking Rent PA
05/06/2018	05/06/2018	Crabtree Manorway N	Belvedere	GRND,1	46,426	9.50	Effective		440,948	Industrial					Direct	15 yrs		05/06/2023	04/06/2033	TCW Solutions	Completed	New	05/06/2018	9		163076541		
01/06/2019	01/06/2019	Fishers Way	Belvedere	GRND,MEZZ	3,384	8.97	Effective	FRI	30,354	Industrial					Direct	5 yrs			31/05/2024	Pheonix Tours Ltd	Completed	New	01/06/2019		Glenny LLP	166894411	8.97	30,354.48
08/05/2019	08/05/2019	Crabtree Manorway S	Belvedere	GRND	826	8.47	Achieved	FRI	6,996	Light Industrial					Direct						Completed	New	08/05/2019		Glenny LLP	166892581	10.00	8,260.00
14/09/2019	14/09/2019	Fishers Way	Belvedere	GRND,MEZZ,1	7,198	7.64	Asking	FRI	54,993	Light Industrial					Direct						Completed	New	14/10/2019		Glenny LLP	168406551	7.64	54,992.72
03/06/2019	03/06/2019	Crabtree Manorway N	Belvedere	GRND,MEZZ,1	12,227	5.73	Effective	FRI	70,060	Industrial					Direct	3 yrs			02/06/2022		Completed	New	03/09/2019		Watson Day (Surveyors) Ltd	166413181	6.29	76,907.83
17/04/2019	17/04/2019	Acorn Rd	Crayford	GRND	1,984	16.46	Effective	FRI	32,664	Industrial					Direct	8 yrs 5 mos	20/09/2022	21/09/2022	21/09/2027	Rexel UK	Completed	Renewal				165337631		
27/03/2018	27/03/2018	Acorn Rd	Crayford	GRND,1	2,099	13.92	Effective	FRI	29,209	Industrial					Direct	10 yrs		27/03/2023	26/03/2028	Crown Paints	Completed	New	27/03/2018	4	JLL, Altus Group	165299471	15.01	31,505.99
28/03/2018	28/03/2018	Acorn Rd	Crayford	GRND	2,500	13.78	Effective	FRI	34,462	Industrial					Direct	10 yrs	27/03/2023	28/03/2023	27/03/2028	Integrated Water Services	Completed	New	28/03/2018	3	JLL	165278211		
19/02/2018	19/02/2018	Thames Rd	Crayford	GRND	2,529	13.77	Effective	FRI	34,834	Industrial					Direct	10 yrs	19/02/2023	19/02/2023	18/02/2028	Homeware Imports Ltd	Completed	New	19/02/2018	3		168380191		
02/07/2018	01/08/2018	Acorn Rd	Crayford	GRND	1,496	13.37	Asking	FRI	20,002	Industrial					Direct					Auto Windscreens	Completed	New	01/08/2018		JLL	157028581	13.37	20,001.52
02/07/2018	14/03/2022	Acorn Rd	Crayford	GRND,1	4,120	12.38	Effective	FRI	51,001	Industrial					Direct	1 yr			13/03/2023	Williams Trade Supplies	Completed	Renewal				165277301		
28/08/2018	01/12/2018	Crayford Rd	Crayford	GRND	4,467	11.75	Asking		52,487	Industrial					Direct						Completed	New	01/12/2018		JLL	162149111	11.75	52,487.25
01/11/2018	01/01/2019	Crayford Rd	Crayford	GRND	6,647	11.50	Asking		76,441	Industrial					Direct						Completed	New	01/01/2019		JLL	162149131	11.50	76,440.50
13/06/2018	13/06/2018	Crayford Rd	Crayford	GRND	6,453	11.37	Effective	FRI	73,386	Industrial					Direct	10 yrs	12/06/2023	13/06/2023	12/06/2028	Wilson Carpets	Completed	New	13/06/2018	3		165423811		
03/12/2019	03/12/2019	Thames Rd	Crayford	GRND,MEZZ	6,092	11.00	Achieved	FRI	67,012	Industrial					Direct	10 yrs	03/12/2024		03/12/2029	Screaming Colour	Completed	New	03/12/2019		BNP Paribas Real Estate UK, Altus Group	169965901	11.00	67,012.00
03/05/2019	03/05/2019	Thames Rd	Crayford	GRND	5,207	10.75	Achieved	FRI	55,975	Industrial					Direct	10 yrs			03/05/2029	Marshalls Motor Group	Completed	New	03/05/2019	3	BNP Paribas Real Estate UK	169343331	10.49	54,621.43
14/06/2018	14/06/2018	Thames Rd	Crayford	GRND,1	3,872	10.65	Effective	FRI	41,236	Industrial	3.90	15,087.00	0.52	2,013.44	Direct	5 yrs	13/06/2020	14/06/2020	13/06/2023	EMD Group	Completed	New	14/06/2018		Glenny LLP	160276691	12.02	46,541.44
07/09/2018	07/09/2018	Crayford Rd	Crayford	GRND,1	15,987	10.48	Effective	FRI	167,495	Industrial					Direct	10 yrs	06/09/2023	07/09/2023	06/09/2028	DCG Logistics UK	Completed	New	07/04/2019	6	JLL	165462771		
05/03/2018	05/03/2018	Thomas Rd	Crayford	GRND	7,168	10.10	Effective	FRI	72,375	Industrial					Direct	10 yrs	14/12/2019	15/12/2019	04/03/2028	Blakley Electrics	Completed	New	20/02/2018			168384891		
01/03/2019	01/03/2019	Thames Rd	Crayford	GRND	6,932	10.03	Achieved	FRI	69,528	Industrial	3.49	24,178.96	0.97	6,724.04	Direct						Completed	New	01/03/2019		BNP Paribas Real Estate UK	164281261	9.50	65,854.00
22/12/2018	22/12/2018	Thames Rd	Crayford	GRND	4,613	10.03	Effective	FRI	46,283	Industrial	3.53	16,279.88	0.88	4,059.44	Direct	10 yrs	22/12/2023		21/12/2028	Lifting Gear Hire	Completed	New	22/12/2018	4	BNP Paribas Real Estate UK, Altus Group	162499831	9.50	43,823.50
14/09/2018	14/09/2018	Thames Rd	Crayford	GRND,1	3,077	9.64	Effective	FRI	29,672	Industrial					Direct	10 yrs	13/09/2023	14/09/2023	13/09/2028	A1m Steel	Completed	New	14/09/2018	2		168406821		
30/07/2018	29/08/2018	Thames Rd	Crayford	GRND,1	4,873	9.55	Asking		46,537	Industrial	8.13	39,610.00	0.88	4,288.24	Direct						Completed	New	29/08/2018		Altus Group	157763201	9.55	46,537.15
26/08/2018	26/08/2018	Thames Rd	Crayford	GRND	13,273	9.09	Effective		120,601	Industrial	3.44	45,602.00	0.78	10,352.94	Direct	10 yrs			25/08/2028	Artis Accident Care	Completed	New	26/08/2018	4	BNP Paribas Real Estate UK	159304181	9.50	126,093.50
14/05/2019	15/08/2019	Crayford Rd	Crayford	GRND	9,142	7.88	Effective		72,068	Industrial					Direct	10 yrs		15/08/2024	14/08/2029	Crayford Tubes	Completed	Renewal		3		172321601		
23/10/2018	23/10/2018	21 Kennet Rd	Crayford	GRND	48,178	7.50	Effective	FRI	361,129	Industrial	3.97	191,345.00			Direct	20 yrs	23/10/2033	23/10/2023	22/10/2038	SparShatt	Completed	New	23/10/2018	8	Colliers International	160339591	7.75	373,379.50
06/06/2018	06/06/2018	Acorn Rd	Crayford	GRND,1	6,427	7.45	Effective	FRI	47,857	Industrial					Direct	10 yrs	05/06/2023	06/06/2023	05/06/2028	Telegraph Media Group	Completed	New	06/06/2018	6		165427561		
05/06/2018	05/06/2018	Swaisland Dr	Crayford	GRND	3,234	5.80	Asking	FRI	18,757	Industrial					Direct					NBS Distribution Ltd	Completed	Renewal	05/06/2018		Caxtons Commercial Ltd	156381571	5.80	18,757.20
28/09/2018	31/10/2018	Thames Rd	Crayford	GRND,1	9,000	5.56	Asking		50,040	Industrial			3.33	29,970.00	Direct						Completed	New	31/10/2018		Watson Day (Surveyors) Ltd	159513981	5.56	50,040.00
10/04/2018	10/05/2018	Swaisland Dr	Crayford	GRND,MEZZ	7,122	4.42	Effective	FRI	31,479	Industrial	3.90	27,782.00			Direct	10 yrs			09/05/2028	NBS Distribution	Completed	New	10/05/2018		Caxtons Commercial Ltd	155530481	4.42	31,479.24
15/11/2019	15/11/2019	Kencot Way	Erith	GRND	1,057	15.56	Asking		16,447	Industrial					Direct						Completed	New	15/11/2019		Glenny LLP	171434611	15.56	16,446.92
15/09/2019	15/09/2019	Kencot Way	Erith	GRND	1,054	15.50	Asking		16,337	Industrial					Direct						Completed	New	15/09/2019		Glenny LLP	171434591	15.50	16,337.00
13/08/2019	13/08/2019	Kencot	Erith	GRND,MEZZ	1,250	14.00	Asking	FRI	17,500	Industrial					Direct	5 yrs	13/08/2022		13/08/2024	SA Coffee	Completed	New	13/08/2019		Glenny LLP	167801321	14.00	17,500.00
07/04/2018	07/04/2018	Kencot Way	Erith	GRND	804	13.43	Asking		10,798	Light Industrial					Direct						Completed	New	07/04/2018		Glenny LLP	157536791	13.43	10,797.72
18/06/2018	18/06/2018	Kencot Way	Erith	GRND	1,419	12.00	Asking		17,028	Light Industrial					Direct						Completed	New	18/06/2018		Glenny LLP	157574101	12.00	17,028.00
23/03/2018	23/05/2018	4-8 Veridion Way	Erith	GRND,1	8,287	11.87	Effective	FRI	98,338	Industrial					Direct	10 yrs	22/05/2023	22/05/2023	22/05/2028	D B Horticulture	Completed	New	23/05/2018		Glenny LLP	155214321		
25/07/2019	25/07/2019	Kencot Close	Erith	GRND	1,970	10.22	Asking	FRI	20,133	Light Industrial					Assignment						Completed	New	01/08/2019		Avon Management	167014941	10.22	20,133.40
21/02/2018	21/02/2018	100 Slade Green Rd	Erith	GRND	820	9.76	Effective	FRI	8,003	Industrial	3.45	2,826.10	0.85	697.00	Direct	1 yr			20/02/2019	Mrs Nicola Campbell	Completed	New	21/02/2018	0	Caxtons Commercial Ltd	154666141	9.75	7,995.00
10/10/2018	10/11/2018	100 Slade Green Rd	Erith	GRND	820	9.76	Asking	FRI	8,003	Light Industrial	3.55	2,908.70	1.02	836.40	Direct						Completed	New	10/11/2018		Caxtons Commercial Ltd	159964461	9.76	8,003.20
19/10/2019	19/10/2019	Hailey Rd	Erith	GRND	4,087	9.50	Asking		38,827	Industrial					Direct	5 yrs	19/10/2022		19/10/2024	Fresh Asia Limited	Completed	New	19/10/2019		Glenny LLP	169322301	9.50	38,826.50
02/11/2018	15/11/2018	Manor Rd	Erith	GRND	2,522	8.92	Effective	FRI	22,496	Industrial					Direct	10 yrs	14/11/2021	14/11/2023	14/11/2028	All Window Services	Completed	Renewal				168460361		
01/09/2019	01/09/2019	9A Bilton Rd	Erith	GRND,1	40,083	8.37	Achieved	FRI	335,495	Industrial					Direct	10 yrs			01/09/2029	Viridor Waste Management	Completed	New	01/09/2019		Altus Group, BNP Paribas Real Estate UK, IPIF	167957961	8.50	340,705.50
15/01/2019	19/02/2019	Fraser Rd	Erith	GRND	3,600	8.33	Asking		29,988	Industrial					Direct						Completed	New	19/02/2019		London Live Work	163620601	8.33	29,988.00
07/12/2018	07/12/2018	Manor Rd	Erith	GRND	2,713	8.29	Effective	FRI	22,491	Industrial					Direct	15 yrs	07/12/2023	07/12/2023	06/12/2033	Pakt	Completed	New	07/12/2018			168424341		
19/02/2018	19/02/2018	Manor Rd	Erith	GRND	2,713	8.29	Effective	FRI	22,491	Industrial					Direct	10 yrs	19/02/2021	19/02/2023	18/02/2028	Alexis Flooring	Completed	New	19/02/2018			168457911		
01/11/2018	01/11/2018	1-2 Freeland Way	Erith	GRND,MEZZ	1,737	8.18	Achieved	FRI	14,209	Industrial	5.13	8,909.40			Direct	5 yrs			31/10/2023	Aroma Barista	Completed	New	01/11/2018	3	Caxtons Commercial Ltd	160317101	8.18	14,208.66
14/06/2018	14/06/2018	Waldrist Way	Erith	GRND	130,419	7.71	Effective	FRI	1,005,525	Industrial					Direct	20 yrs	14/06/2033	14/06/2023	13/06/2038	Booker	Completed	New	14/06/2018			167644671		
27/07/2018	27/07/2018	5 Centurion Way	Erith	GRND,1	78,551	7.64	Effective	FRI	600,128	Industrial					Direct	25 yrs	27/07/2033	27/07/2023	26/07/2043	Allied Hygiene	Completed	New	27/07/2018			162035001		
01/08/2018	16/09/2018	2 Freeland Way	Erith	GRND	1,111	7.44	Asking		8,266	Industrial	2.85	3,169.00			Direct						Completed	New	16/09/2018		Watson Day (Surveyors) Ltd	158290531	7.44	8,265.84
01/08/2018	16/09/2018	2 Freeland Way	Erith	GRND	525	7.44	Asking		3,906	Industrial	6.04	3,169.00			Direct						Completed	New	16/09/2018		Watson Day (Surveyors) Ltd	158290541	7.44	3,906.00
01/08/2018	16/09/2018	2 Freeland Way	Erith	MEZZ	904	7.44	Asking		6,726	Industrial	2.85	2,578.00			Direct						Completed	New	16/09/2018		Watson Day (Surveyors) Ltd	158290551	7.44	6,725.76
21/12/2018	21/12/2018	68 Hailey Rd	Erith	GRND,1	32,020	6.74	Effective		215,863	Industrial					Assignment	12 yrs 7 mos	07/07/2022	07/07/2022	06/07/2031	Ware Logic	Completed	New	21/12/2018			167886211		
01/05/2018	01/05/2018	41 Hailey Rd	Erith	GRND,1	70,265	6.62	Effective		465,368	Industrial					Direct	15 yrs	01/05/2028	01/05/2023	30/04/2033	APP Wholesale PLC	Completed	New	01/05/2018	18	Knight Frank LLP, Glenny LLP	156047981	7.00	491,855.00
14/11/2018	14/11/2018	6-6A Hailey Rd	Erith	GRND,1	20,411	5.41	Effective	FRI	110,422	Industrial	9.36	191,000.00			Assignment	4 yrs 7 mos			25/06/2023	ARB Recycling	Completed	New	14/11/2018	0	Glenny LLP	160340381	5.41	110,423.51
17/08/2018	17/08/2018	Maidstone Rd	Sidcup	GRND	5,737	11.42	Effective	FRI	65,505	Industrial					Direct	10 yrs	17/08/2023	17/08/2023	16/08/2028	Wolseley	Completed	New	17/08/2018	2		168586511		
17/08/2018	17/08/2018	Maidstone Rd	Sidcup	GRND	5,780	11.34	Effective	FRI	65,539	Industrial					Direct	10 yrs	17/08/2023	17/08/2023	16/08/2028	Wolseley	Completed	New	17/08/2018	2		168584391		

	Upper quartile figures
Belvedere	8.97
Crayford	11.75
Erith	10.63
Sidcup	11.40

Sign Date	Start Date	Address	City	Floor	Total SF Leased	Rent/SF/ Yr	Rent Type	Service	Rent PA	Use	Business Rates/SF/Yr	Business Rates PA	Service Charge	Service Charge PA	Lease Type	Term	Break Date	Review Date	Expiry Date	Tenant	Lease Status	Deal Type	Move-in Date	Rent Free	Leasing Agent Company	Lease Comp ID	Asking Rent/SF/Yr	Asking Rent PA
02/08/2019	02/08/2019	4-12 Pickford Ln	Bexleyheath	1st	3,174	9.29	Effective	FRI	29,486.34	Office					Direct	3 yrs			01/08/2022		Completed	New	02/08/2019		Caxtons Commercial Ltd	167193631	9.29	29,486.46
01/07/2019	01/07/2019	St Fidelis Rd	Erith	GRND	880	12.95	Effective	FRI	11,395.97	Office					Direct	5 yrs	01/01/2022		30/06/2024	Think Big Tuition	Completed	New	01/07/2019		Caxtons Commercial Ltd	167038841	15.91	14,000.80
01/05/2019	01/05/2019	Thames Rd	Crayford	GRND	1,800	13.89	Asking	FRI	25,002.00	Office					Direct						Completed	New	21/07/2019		Watson Day (Surveyors) Ltd	166314661	13.89	25,002.00
07/12/2018	07/12/2018	122A Broadway	Bexleyheath	1st	1,600	19.80	Effective	FRI	31,684.56	Office	2.89	4,622.10			Direct	8 yrs		06/12/2022	06/12/2026	Mr TD Rees	Completed	New	07/12/2018		Sinclair Jones	161507631	18.84	30,144.00
24/08/2018	29/09/2018	Edgington Way	Sidcup	GRND,1	5,623	11.69	Effective		65,732.54	Office						5 yrs			28/09/2023	Kuehne Nagel	Completed	New	29/09/2018			171290721		
20/04/2018	20/04/2018	Welling High St	Welling	GRND	295	11.74	Asking	FRI	3,463.30	Office					Direct	10 yrs			19/04/2028	Jason Ball	Completed	New	20/04/2018	3	Hummerstone & Hawkins	155680451	11.74	3,463.30

Upper quartile 13.66 146.98

Sign Date	Start Date	Address	City	Floor	Total SF Leased	Rent/SF/Yr	Rent Type	Service	Rent PA	Use	Business Rates/SF/Yr	Business Rates PA	Service Charge	Service Charge PA	Lease Type	Term	Break Date	Review Date	Expiry Date	Tenant	Lease Status	Deal Type	Move-in Date	Rent Free	Leasing Agent Company	Lease Comp ID	Asking Rent/SF/Yr	Asking Rent PA
03/09/2019	03/09/2019	75A Nuxley Rd	Belvedere	GRND	668	43.41	Achieved	FRI	29,000.00	Retail					Direct	15 yrs			02/09/2034	Acorn Estate Agent	Completed	New	03/09/2019		Caxtons Commercial Ltd	167577911		
28/11/2018	28/12/2018	18A Albert Rd	Belvedere	GRND	240	32.50	Achieved	FRI	7,800.00	Retail	9.03	2,166.90			Direct	5 yrs			27/12/2023		Completed	New	28/12/2018		Hummerstone & Hawkins	160396381	36.46	8,750.00
02/09/2019	09/10/2019	8B Nuxley Rd	Belvedere	GRND	510	23.53	Effective		11,999.81	Retail					Direct	5 yrs			08/10/2024		Completed	New	09/10/2019		Hummerstone & Hawkins	171276611	23.53	12,000.00
30/09/2019	30/09/2019	9 Picardy St	Belvedere	GRND	996	10.04	Achieved	FRI	10,000.00	Retail					Direct	10 yrs	24/12/2024	30/09/2024	29/09/2029	Coral	Completed	Renewal				168202321		
18/12/2018	08/02/2019	Steynton Ave	Bexley	GRND	145	34.48	Achieved	FRI	5,000.00	Retail					Direct	1 yr			07/02/2020		Completed	New	08/02/2019		Amey TPT Ltd	163064441	34.48	5,000.00
22/06/2018	22/06/2018	34 Bexley High St	Bexley	GRND	428	29.21	Achieved	FRI	12,500.00	Retail	8.93	3,821.20			Assignment	20 yrs			21/06/2038		Completed	New	22/06/2018	0	Robert Ingram & Co Ltd	157850451	28.04	12,000.00
19/03/2018	19/03/2018	Broadway Centre	Bexleyheath	GRND	700	78.57	Effective	FRI	54,999.44	Retail	47.57	33,299.00	11.07	7,749.00	Direct	10 yrs			18/03/2028	Claire'S Accessories Uk	Completed	New	19/03/2018		Jackson Criss	155361171	100.00	70,000.00
10/05/2019	10/05/2019	61 Mayplace Rd E	Bexleyheath	GRND	300	53.33	Effective	FRI	15,999.93	Retail	10.02	3,007.30			Direct	20 yrs	10/05/2024	10/05/2024	09/05/2039		Completed	New	10/05/2019		Caxtons Commercial Ltd	165842051	66.67	20,000.00
19/02/2018	19/02/2018	Broadway	Bexleyheath	GRND	1,201	41.04	Effective	FRI	49,285.67	Retail					Direct	10 yrs	19/02/2023	19/02/2022	18/02/2028	Smiggle	Completed	New	19/02/2018	10		163402211		
13/04/2018	13/04/2018	Broadway	Bexleyheath	GRND,1	2,103	33.63	Effective	FRI	70,714.37	Retail					Direct	10 yrs	13/04/2023	13/04/2023	12/04/2028	Vision Express	Completed	New	13/04/2018			163402641		
07/02/2019	09/03/2019	131 Broadway	Bexleyheath	GRND	2,611	32.55	Asking	FRI	85,000.00	Retail	12.66	33,051.00			Direct						Completed	New	09/03/2019		Fawcett Mead Ltd	162937011	32.55	85,000.00
25/07/2018	25/07/2018	133 Broadway	Bexleyheath	GRND	2,917	27.43	Asking	FRI	80,000.00	Retail	11.31	33,000.00			Direct						Completed	New	25/07/2018		Langleys Chartered Surveyors	157843961	27.43	80,000.00
15/11/2019	15/11/2019	193 Broadway	Bexleyheath	GRND	1,000	26.00	Asking		26,000.00	Retail					Direct						Completed	New	15/11/2019		Langleys Chartered Surveyors	169382991	26.00	26,000.00
31/10/2018	31/10/2018	195 Broadway	Bexleyheath	GRND	1,083	25.85	Achieved	FRI	28,000.00	Retail					Direct	20 yrs		31/10/2023	30/10/2038		Completed	New	31/10/2018	6	Langleys Chartered Surveyors	160461031		
30/10/2018	05/11/2018	131 Broadway	Bexleyheath	GRND	2,637	22.52	Effective		59,391.97	Retail					Direct	10 yrs	04/11/2024		04/11/2028	Muffin Break	Completed	New	05/11/2018	8		162941151		
22/03/2018	22/03/2018	178 Broadway	Bexleyheath	GRND,1	1,190	21.85	Asking	FRI	26,000.00	Retail	6.95	8,271.50			Direct						Completed	New	22/03/2018		Hummerstone & Hawkins	155157141	21.85	26,000.00
13/08/2018	13/08/2018	145 Broadway	Bexleyheath	GRND	1,663	20.36	Effective	FRI	33,853.92	Retail					Direct	10 yrs	13/08/2018		12/08/2028		Completed	New	04/11/2018	3	Langleys Chartered Surveyors	159555991	22.55	37,500.00
22/03/2018	03/04/2018	5-6 Chieveley Parade	Bexleyheath	GRND	601	16.64	Effective	FRI	9,999.95	Retail	6.95	4,174.89			Direct	5 yrs			02/04/2023		Completed	New	03/04/2018		Robert Ingram & Co Ltd	155115801	16.64	10,000.00
15/04/2019	15/04/2019	The Mall	Bexleyheath	GRND	9,025	15.51	Effective		139,998.57	Retail					Direct	10 yrs			14/04/2029	One Below	Completed	New	15/04/2019		Lunson Mitchenall	170019211	24.93	225,000.00
14/02/2019	14/02/2019	Albion Rd	Bexleyheath	GRND	3,700	8.65	Effective		31,999.82	Retail					Direct	17 yrs 4 mos	24/06/2026	24/06/2021	24/06/2036	Il Vesuvio Restaurant and Pizzeria	Completed	New	14/02/2019			171165491		
29/11/2019	29/12/2019	128 Crayford Rd	Crayford	GRND	636	31.45	Achieved	FRI	20,000.00	Retail	18.14	11,538.00			Direct	10 yrs					Completed	New	29/12/2019		Robert Ingram & Co Ltd	169662211	36.95	23,500.00
03/10/2019	02/11/2019	179 Crayford Rd	Crayford	GRND	736	20.38	Achieved	FRI	15,000.00	Retail	7.07	5,206.00			Direct	16 yrs					Completed	New	02/11/2019		Linays Commercial	168173401	20.38	15,000.00
03/10/2019	02/11/2019	171-173 Crayford Rd	Crayford	GRND	1,512	17.86	Achieved	FRI	27,000.00	Retail	7.42	11,215.00			Direct	15 yrs					Completed	New	02/11/2019		Linays Commercial	168173381	18.52	28,000.00
05/02/2018	05/02/2018	15 Crayford High St	Crayford	GRND	747	17.40	Asking	FRI	13,000.00	Retail	5.49	4,100.80			Direct						Completed	New	05/02/2018		Robert Ingram & Co Ltd	144924901	17.40	13,000.00
18/12/2018	07/03/2019	Town Sq	Erith	GRND	1,044	28.74	Achieved	FRI	30,000.00	Retail	8.26	8,622.00			Direct	10 yrs			06/03/2029	Sabina Hair & Beauty	Completed	New	07/03/2019	6	Savills	162806571	26.82	28,000.00
19/06/2018	19/07/2018	275 Bexley Rd	Erith	GRND	572	18.36	Asking	FRI	10,500.00	Retail	5.47	3,131.10			Direct						Completed	New	19/07/2018		Baxter Philips Ltd	156680361	18.36	10,500.00
01/11/2019	01/12/2019	265 Bexley Rd	Erith	GRND	600	16.35	Effective		9,808.34	Retail					Direct	5 yrs			30/11/2024		Completed	New	12/12/2019	1	Hummerstone & Hawkins	171276581	18.33	11,000.00
29/03/2018	29/03/2018	Erith High St	Erith	GRND,1	2,844	5.27	Effective	FRI	14,999.03	Retail	5.81	16,526.00			Direct	1 yr	28/01/2019		20/03/2019	The Works	Completed	New	01/06/2018		Savills	155187231	19.34	55,000.00
16/03/2018	16/03/2018	279 Main Rd	Sidcup	GRND	489	30.67	Effective	FRI	14,999.84	Retail	8.77	4,289.00			Direct	10 yrs			15/03/2028		Completed	New	16/03/2018		Linays Commercial	154660421	30.67	15,000.00
01/03/2019	01/03/2019	47 The Oval	Sidcup	GRND	527	28.46	Achieved	FRI	15,000.00	Retail	7.00	3,688.00			Direct	10 yrs			28/02/2029		Completed	New	01/03/2019		Linays Commercial	164750391	42.69	22,500.00
16/03/2018	16/03/2018	69A Sidcup High St	Sidcup	GRND	552	24.26	Effective	FRI	13,390.22	Retail	3.90	2,155.50			Direct	10 yrs			15/03/2028		Completed	New	16/03/2018	4	Linays Commercial	154660521	25.36	14,000.00
07/09/2018	07/10/2018	1 Sidcup High St	Sidcup	GRND	850	23.53	Asking	FRI	20,000.00	Retail					Direct	15 yrs			06/10/2033		Completed	New	07/10/2018		Manhar Group, Linays Commercial	158781611	23.53	20,000.00
15/08/2018	15/08/2018	Station Rd	Sidcup	2nd	523	22.94	Achieved	FRI	12,000.00	Retail					Direct						Completed	New	15/08/2018		Linays Commercial	159303991	22.94	12,000.00
12/11/2019	12/12/2019	72 Sidcup High St	Sidcup	GRND	1,696	20.64	Asking	FRI	35,000.00	Retail					Direct						Completed	New	12/12/2019		Hindwoods Ltd	169087031	20.64	35,000.00
01/09/2018	01/09/2018	15 Blackfen Rd	Sidcup	GRND	890	19.10	Achieved	FRI	17,000.00	Retail					Direct						Completed	New	01/09/2018		Linays Commercial	167987241	20.22	18,000.00
07/03/2018	07/03/2018	46b Woodside Rd	Sidcup	GRND	643	18.66	Asking		12,000.00	Retail	3.57	2,292.45			Direct						Completed	New	07/03/2018		Linays Commercial	152269271	18.66	12,000.00
23/04/2018	23/04/2018	5 Blackfen Parade	Sidcup	GRND	833	14.00	Asking		11,662.00	Retail	7.19	5,987.50			Direct						Completed	New	23/04/2018		Pall Mall Estates	155448811	14.00	11,662.00
03/09/2018	03/09/2018	114A Bellegrove Rd	Welling	GRND	350	37.14	Achieved	FRI	13,000.00	Retail	7.06	2,469.80	1.57	550.00	Sublease	5 yrs			02/09/2023		Completed	New	03/09/2018		Hummerstone & Hawkins	159870931	37.14	13,000.00
28/09/2018	30/10/2018	9-11 Bellegrove Rd	Welling	Unkwn	400	32.50	Achieved	FRI	13,000.00	Retail	6.84	2,736.00			Direct						Completed	New	30/10/2018		Hummerstone & Hawkins	159943431		
30/06/2018	30/06/2018	60 Bellegrove Rd	Welling	GRND	550	27.73	Asking	FRI	15,250.00	Retail	8.87	4,880.70			Direct						Completed	New	30/06/2018		Linays Commercial	157304671	27.73	15,250.00
10/04/2018	10/04/2018	75 Hadlow Rd	Welling	Unkwn	460	22.61	Achieved		10,400.00	Retail						10 yrs			09/04/2028	Brow Babe	Completed	New	10/04/2018			158359101		
02/03/2018	02/03/2018	53 Welling High St	Welling	GRND	435	20.69	Asking	FRI	9,000.00	Retail	7.82	3,401.80			Direct						Completed	New	02/03/2018		Hummerstone & Hawkins	155157201	20.69	9,000.00
04/07/2018	03/08/2018	10 Bellegrove Rd	Welling	GRND	1,100	20.00	Effective	FRI	21,999.89	Retail	7.59	8,349.00			Direct	5 yrs			02/08/2023		Completed	New	03/08/2018		Hummerstone & Hawkins	157101871	21.82	24,000.00

Belvedere	35.23
Bexley	33.16
Bexleyheatl	33.36
Crayford	23.15
Erith	20.95
Sidcup	24.26
Welling	31.31

Upper quartile all