

# Industrial Intensification Study

Public Consultation Draft

May 2021

## Industrial Intensification Study Purpose

This strategy informs the LBB 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 strategy will inform design guidance to be included in the forthcoming Design Supplementary Planning Document. 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 strategy. The forthcoming Bexley Riverside OAPF and Housing and Land workstream associated with the Abbey Wood to Ebbsfleet (AW2E) Connectivity Study will use this strategy as the basis for spatial approaches to the future of land in the north of the borough.

The strategy 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 or 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 states 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 B1c, 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 have 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 B1c, B2 and B8 will be permitted and safeguarded. In addition, B1a 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                   |  | New Local Centre         |
|  | District Centre                       |  | Railway line and station |
|  | Major District Centre                 |  | Crossrail and station    |
|  | Focus of New Development              |  | Potential Crossrail ext. |
|  | Metropolitan Open Land/<br>Green Belt |  | Potential DLR Extension  |
|  | Rivers                                |  | Potential River Crossing |
|  | Opportunity Area                      |  | Potential Rapid Transit  |



Growth Strategy Key Diagram

Source: LBB Growth Strategy

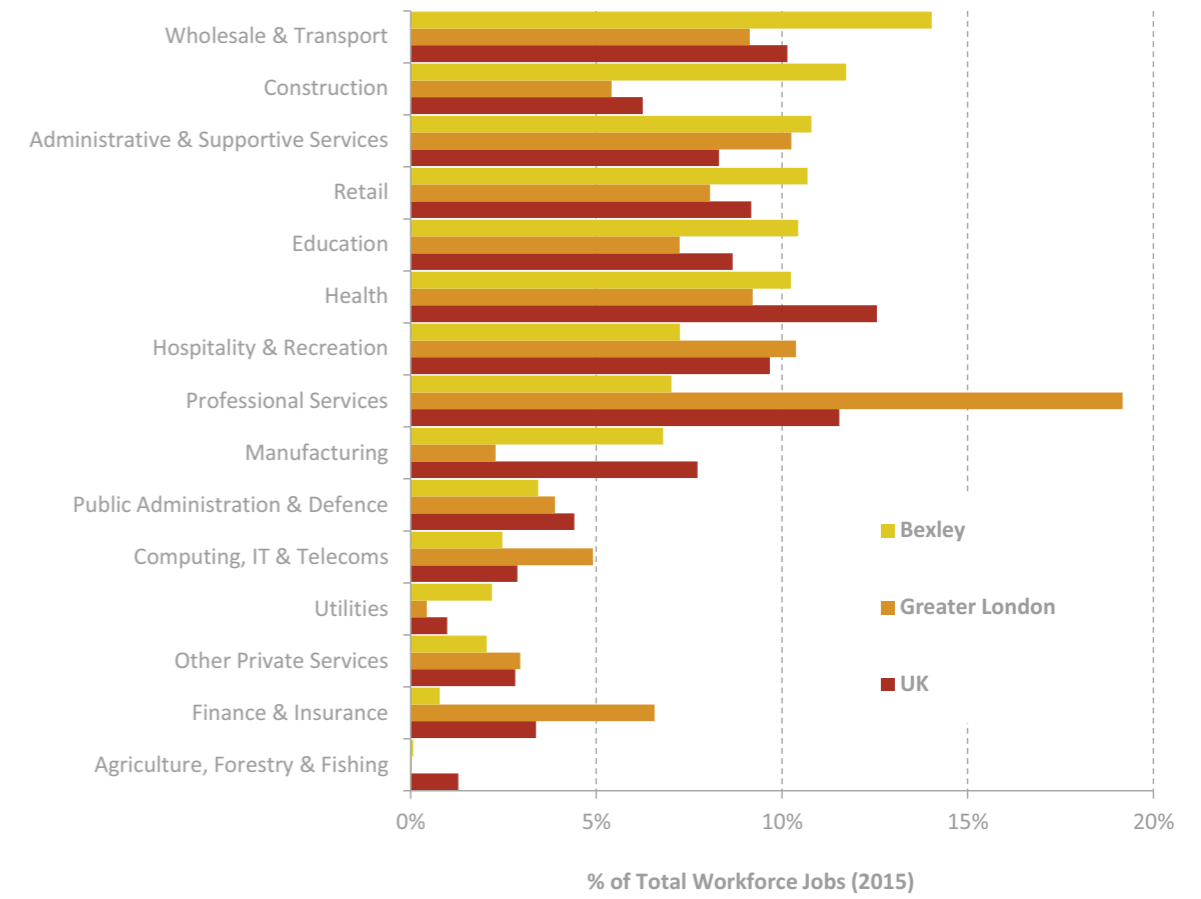
## Employment

### 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

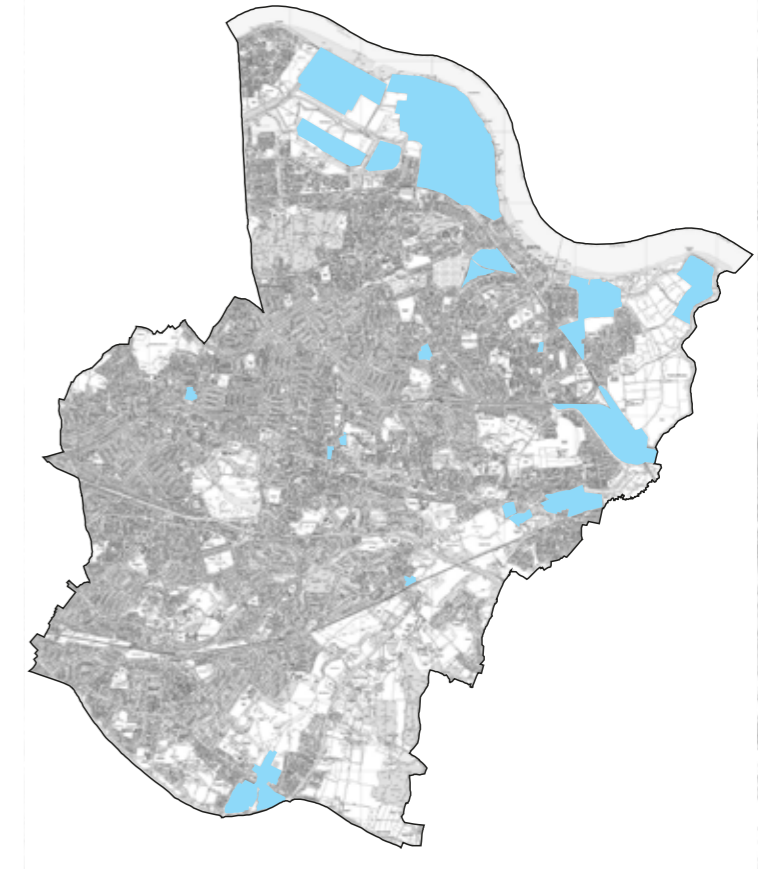
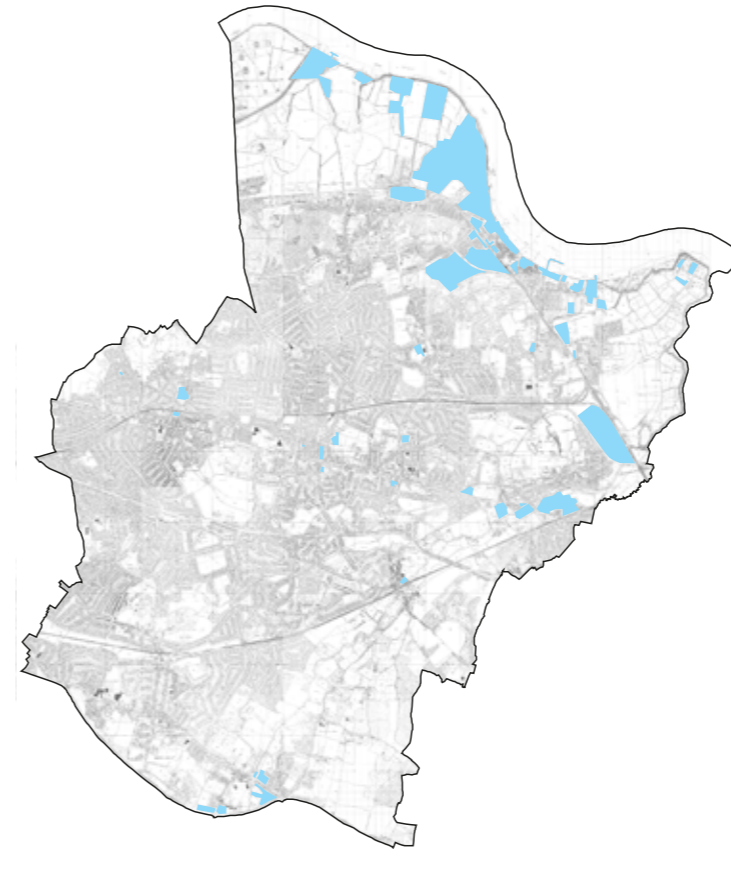
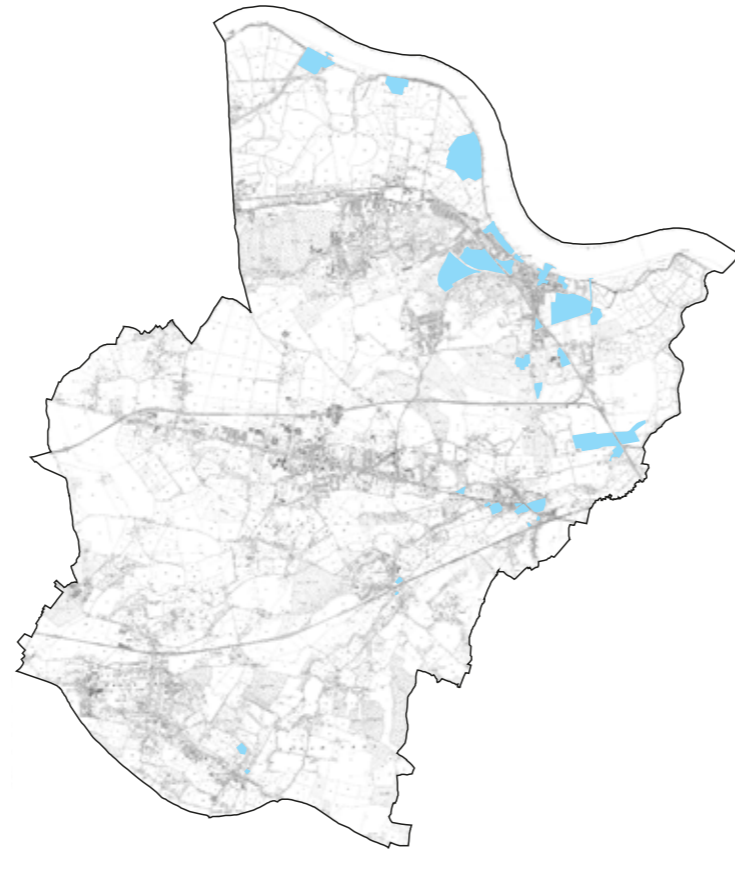
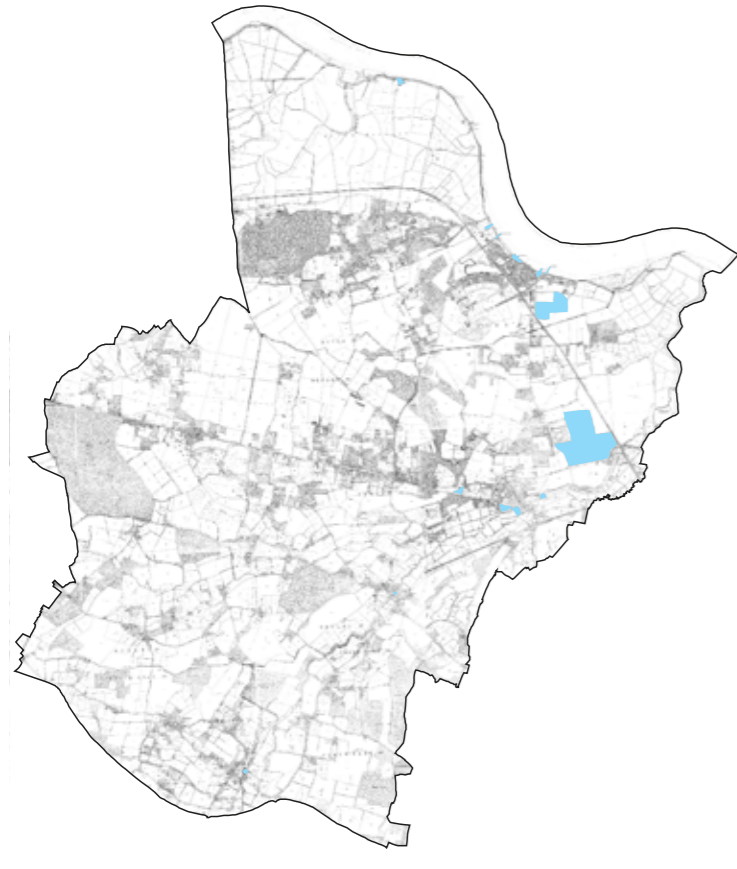
- The largest sectors in Bexley in 2015 were wholesale & transport (14.0%), construction (11.7%), administrative services (10.8%), retail (10.7%), education (10.4%), and healthcare (10.2%).
- Compared with London, Bexley is significantly over-represented in employment terms in wholesale & transport, 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.

## Sub-Regional Context Industrial Land and Development

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

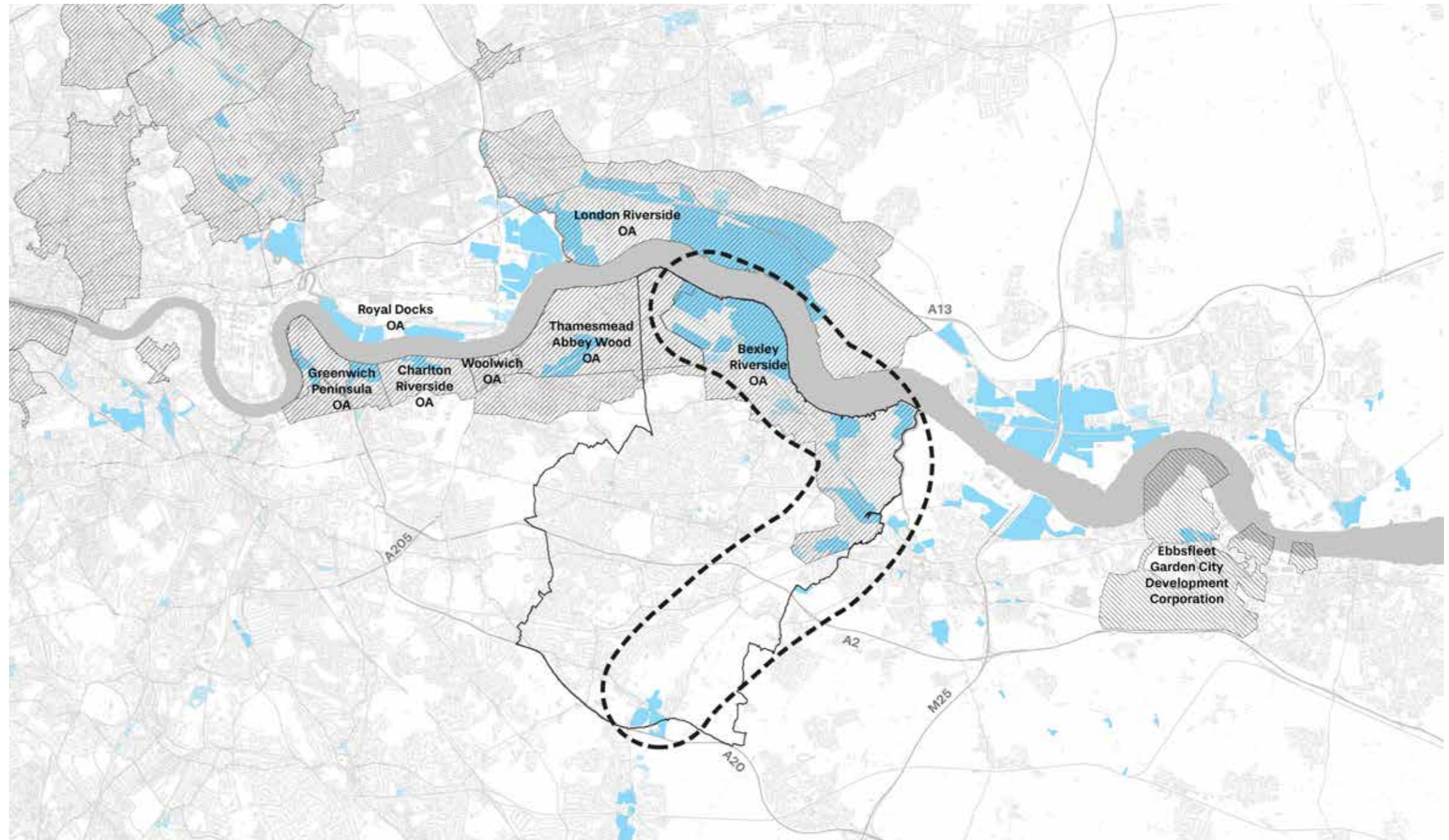
To the west, large areas of industrial land have been released for residential development, particularly in the Greenwich Peninsula.

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.

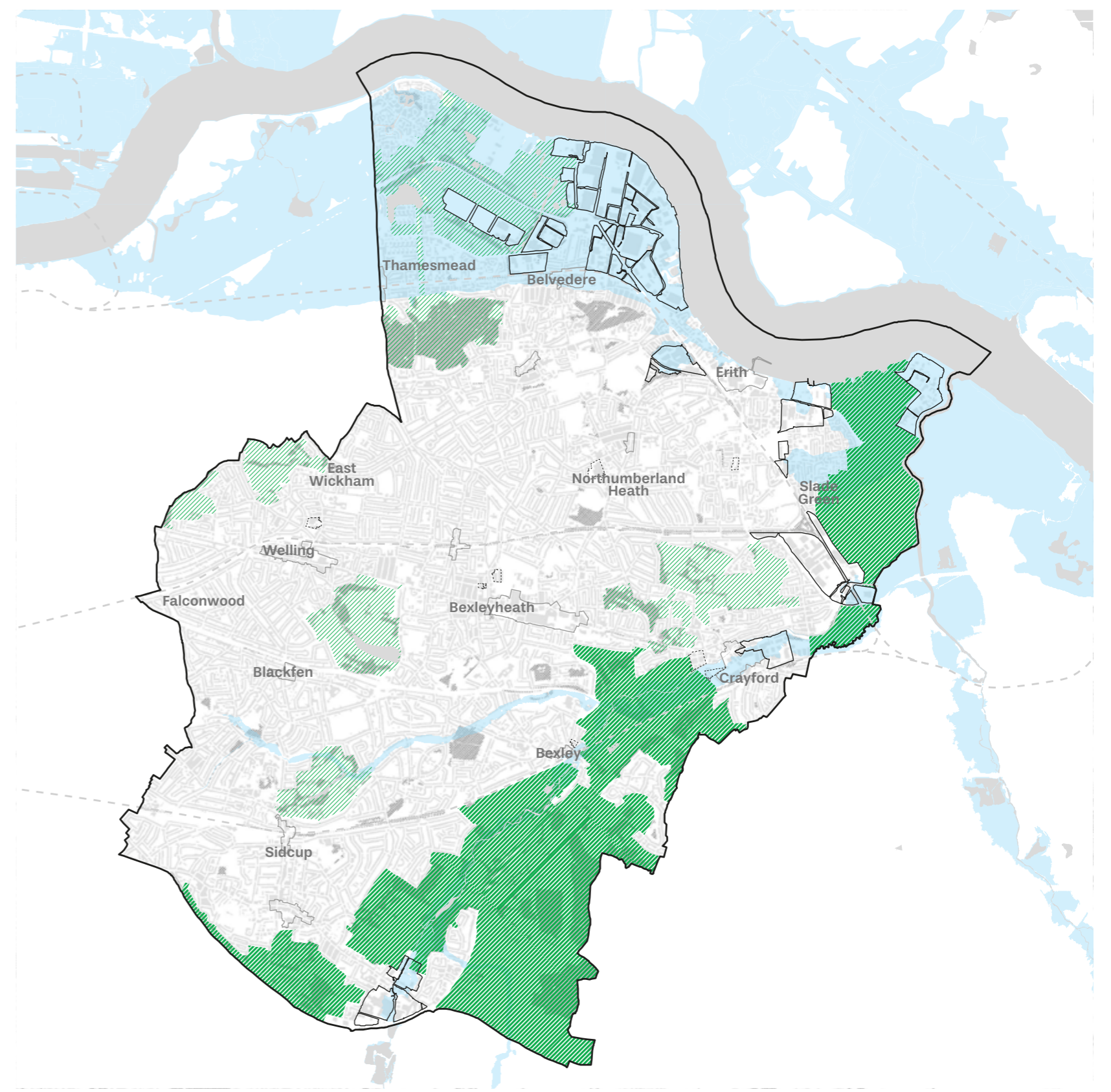
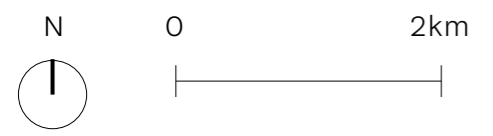


### Policy Designations

Industrial land in the borough is often located close to other large areas of designated open land, such as greenbelt and MOL. The majority of industrial land also falls within flood zone 2.

#### Key

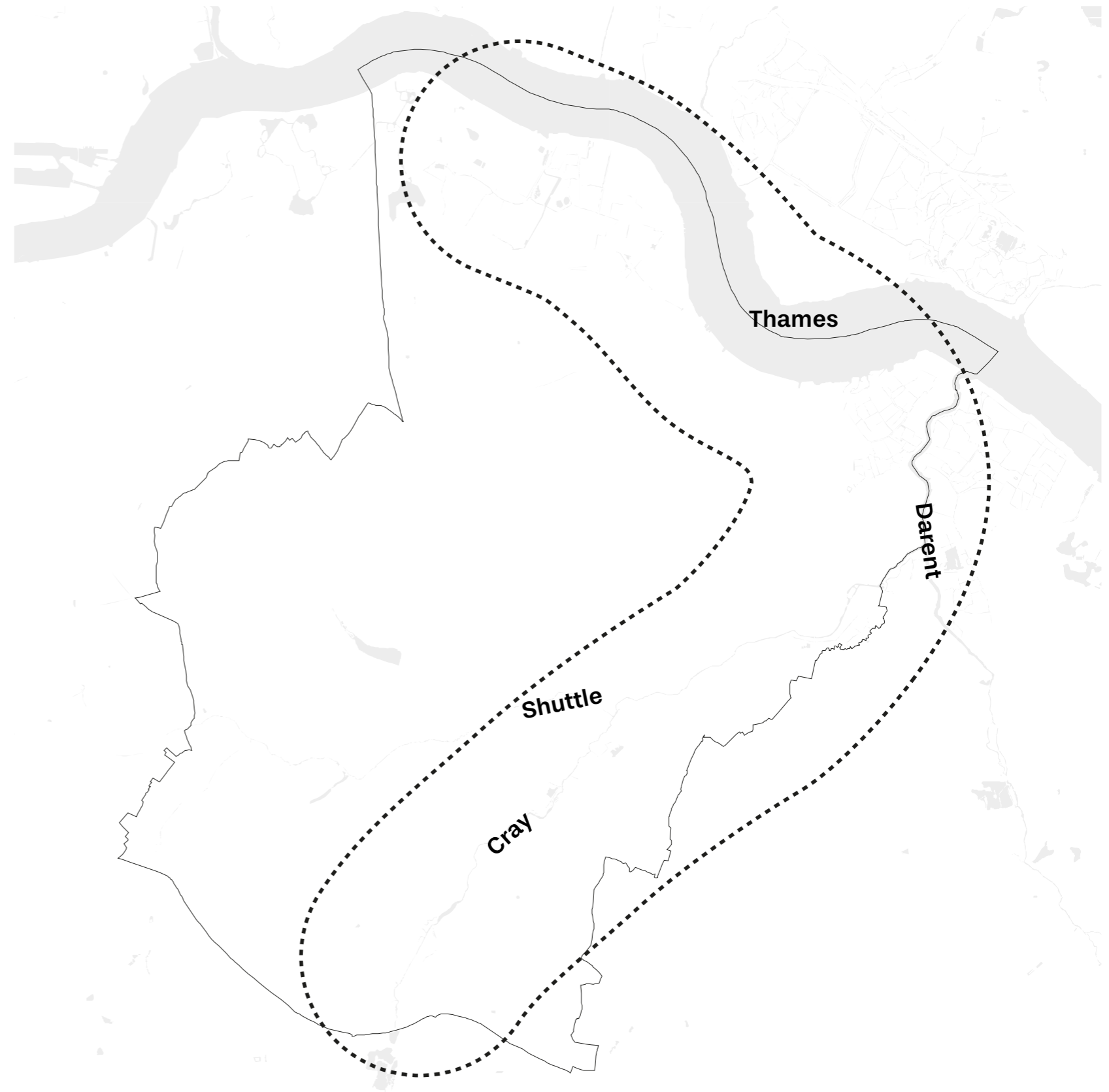
-  Town centre boundary (LP Reg 18)
-  SIL
-  LSIS
-  Greenbelt
-  Metropolitan Open Land
-  Flood Zone 2



## Historical 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.

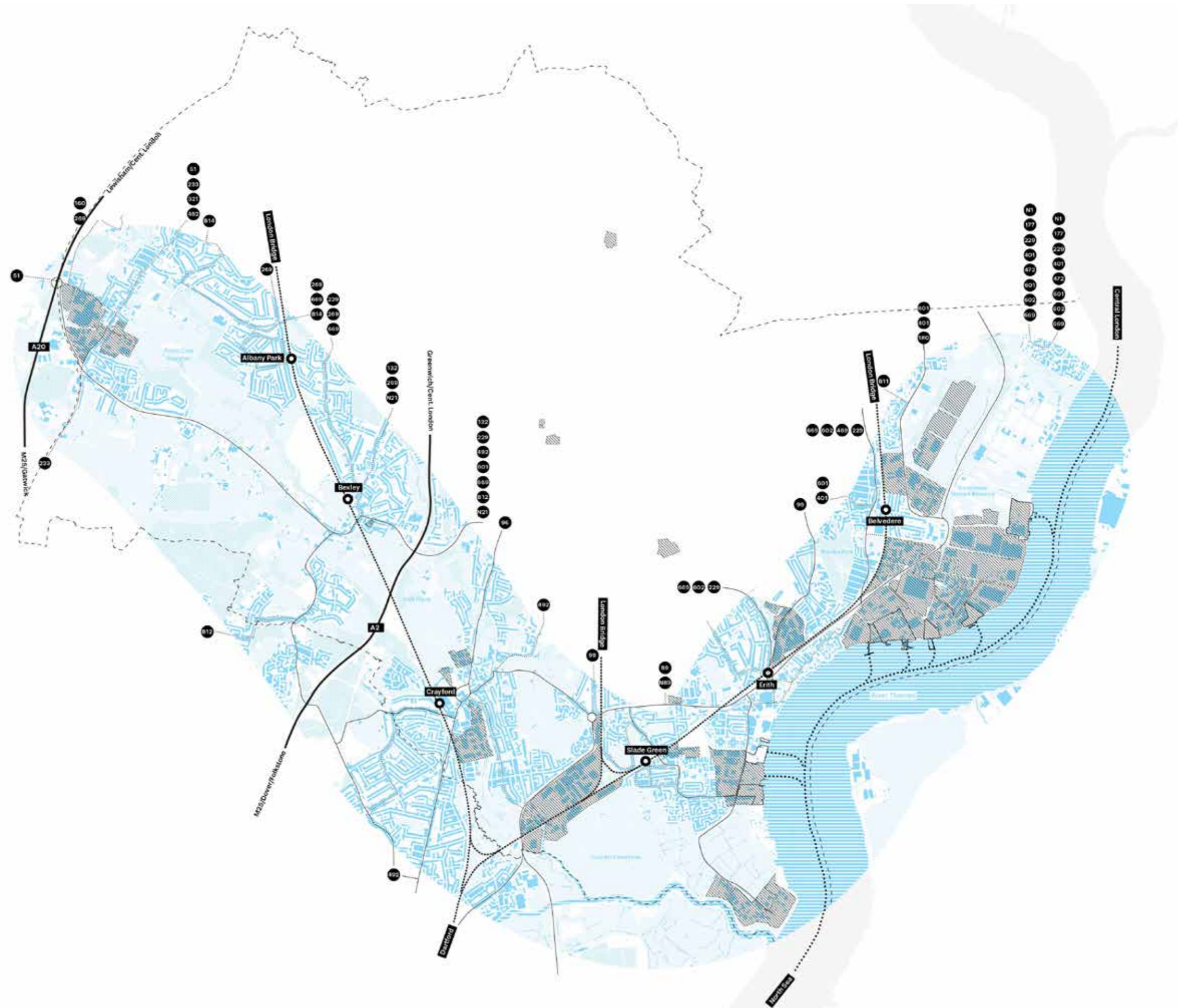
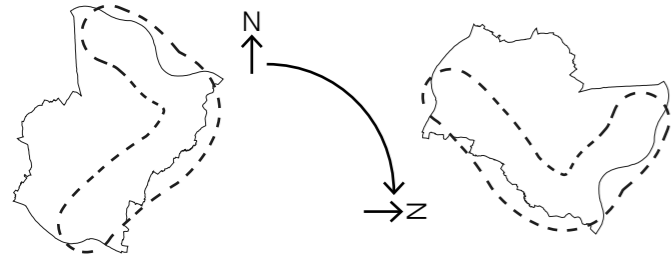


## Historical Development Industrial Band






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 Marshes, Hall Place and Crayford Marshes, have limited the points at which this band is traversed by transport infrastructure.

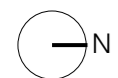
The diagram has been rotated through 90 degrees to follow the form of the river valleys that define this space.



### Key

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

0 500m 2km



## 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 (B1c/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 (B1c/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<sup>2</sup>) 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 (B1c/B2) uses.
- Demand for mid sized units (3,000–5,000 m<sup>2</sup>) 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 residential uses.

## Industrial Land Audit Plot Coverage

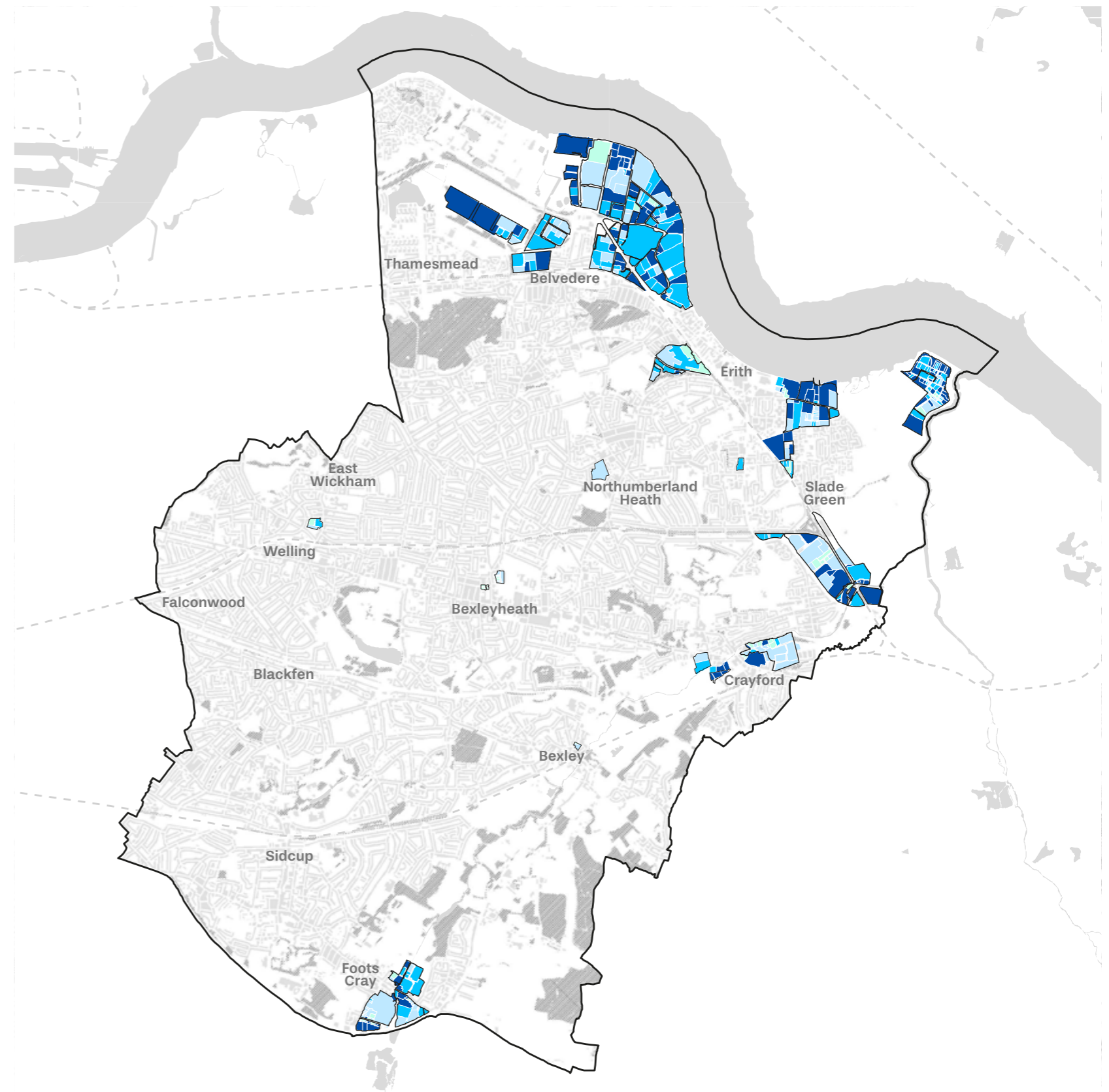
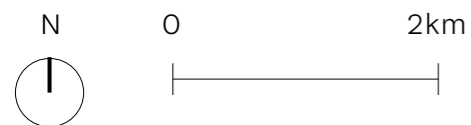
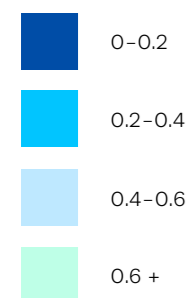
### Relevance For Intensification

- 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.
- Areas of LSIS in Welling, Bexleyheath and Northumberland Heath have higher plot coverage.

### Key



## Industrial Land Audit Floor to Area Ratio

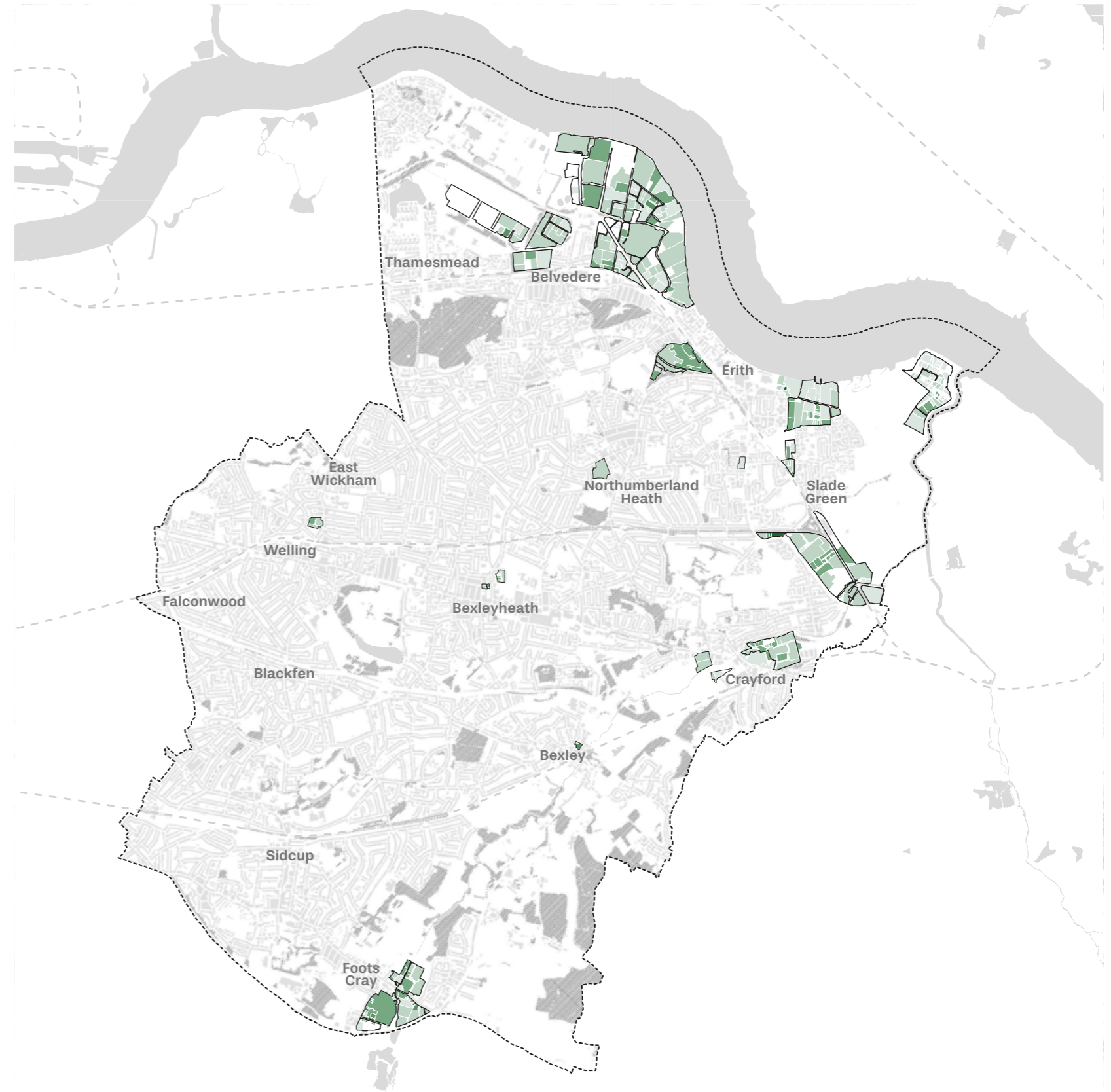
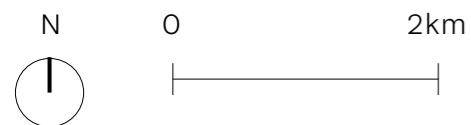
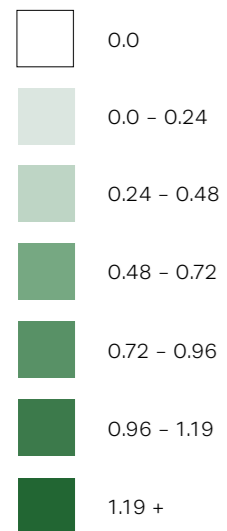
### Relevance For Intensification

- 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



## Industrial Land Audit Business Activity














### Relevance For Intensification

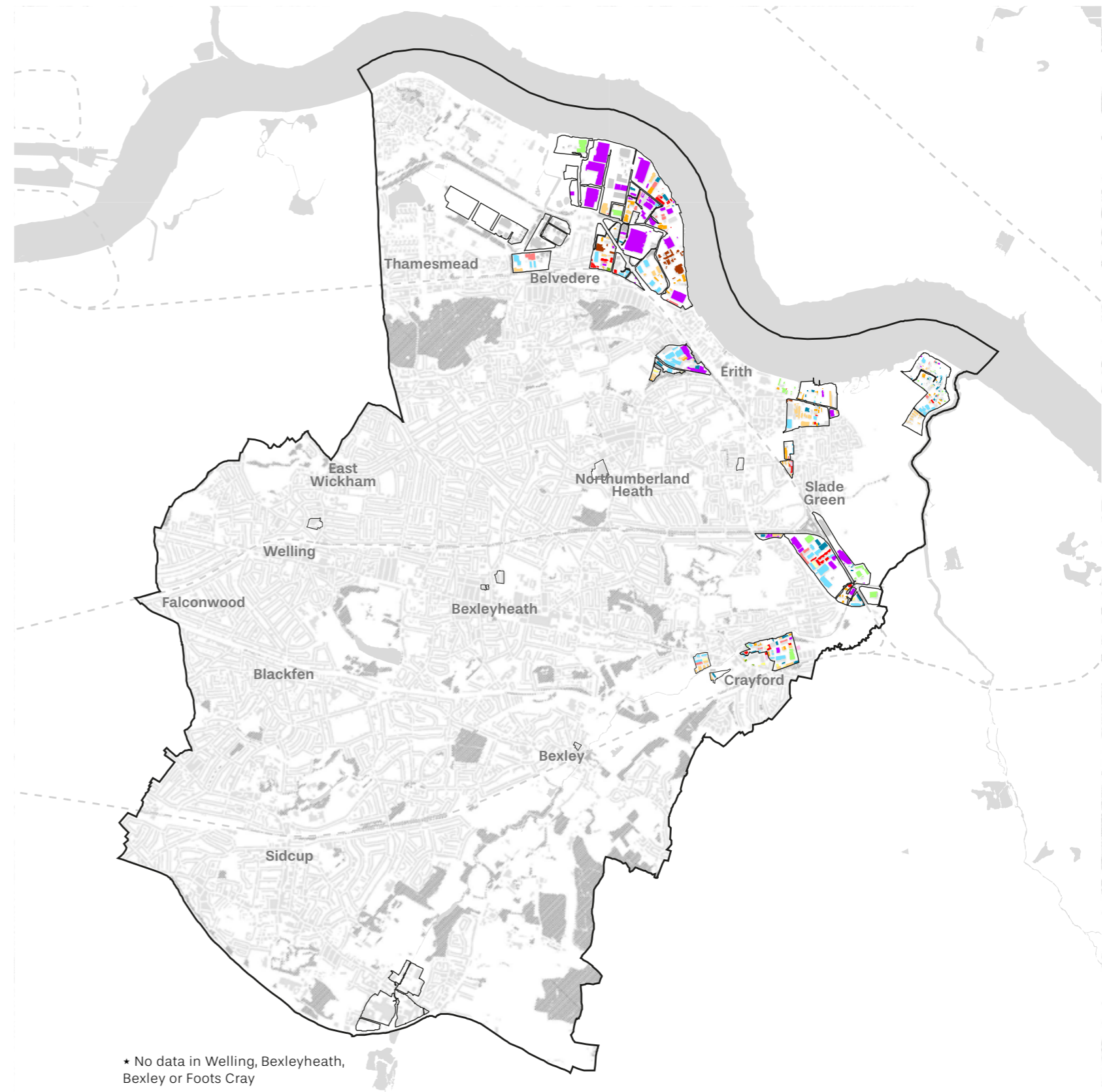
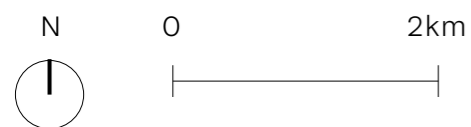
- Clustering of related uses may suggest connections between businesses facilitated by spatial proximity.
- Clustering reflects spatial preferences of different sectors.
- Presence of non-industrial uses signals erosion of SIL uses.

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



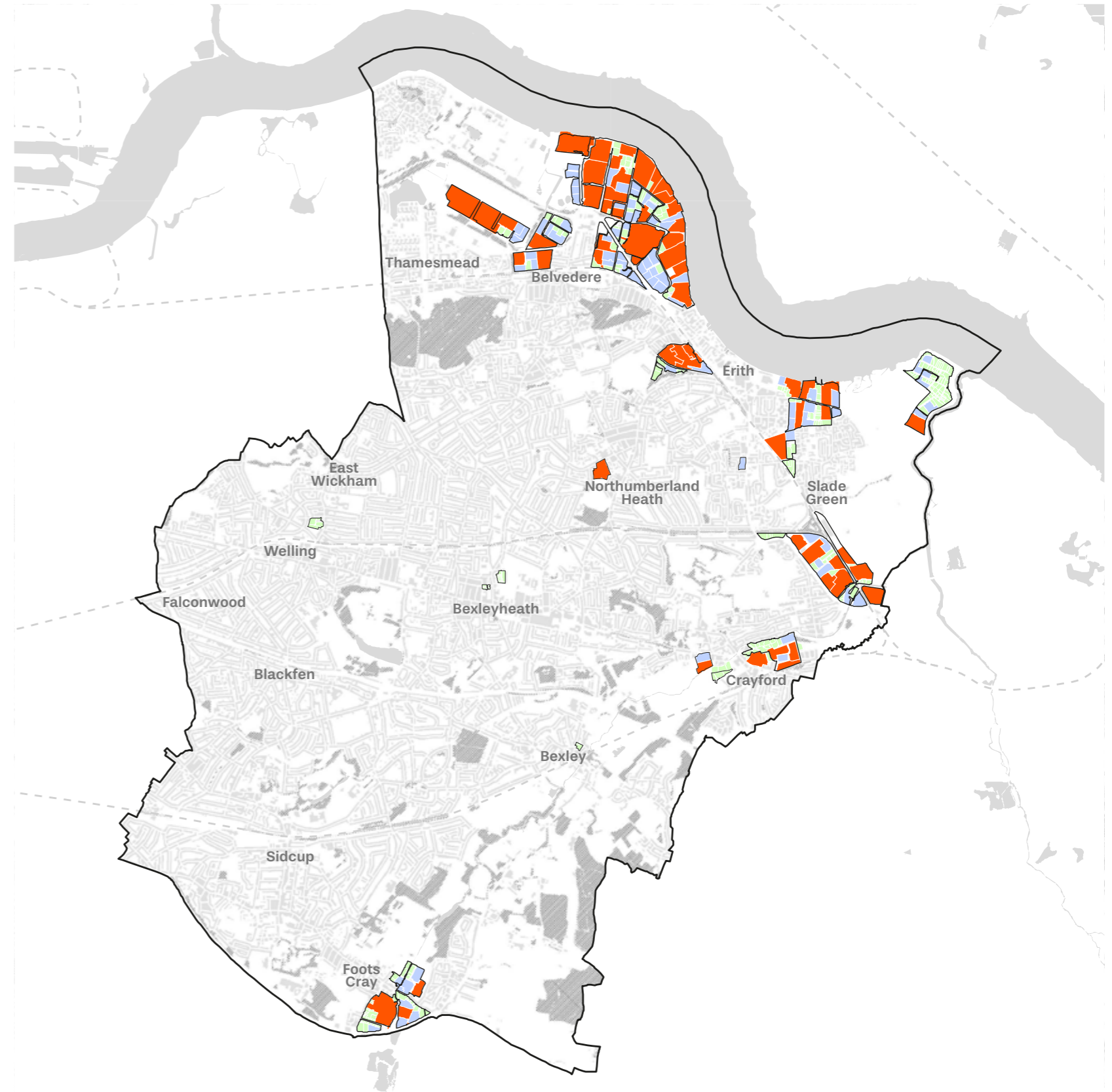
## Industrial Land Audit Site Area

### 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.

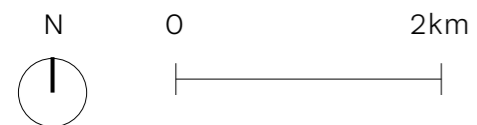
### General Pattern

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



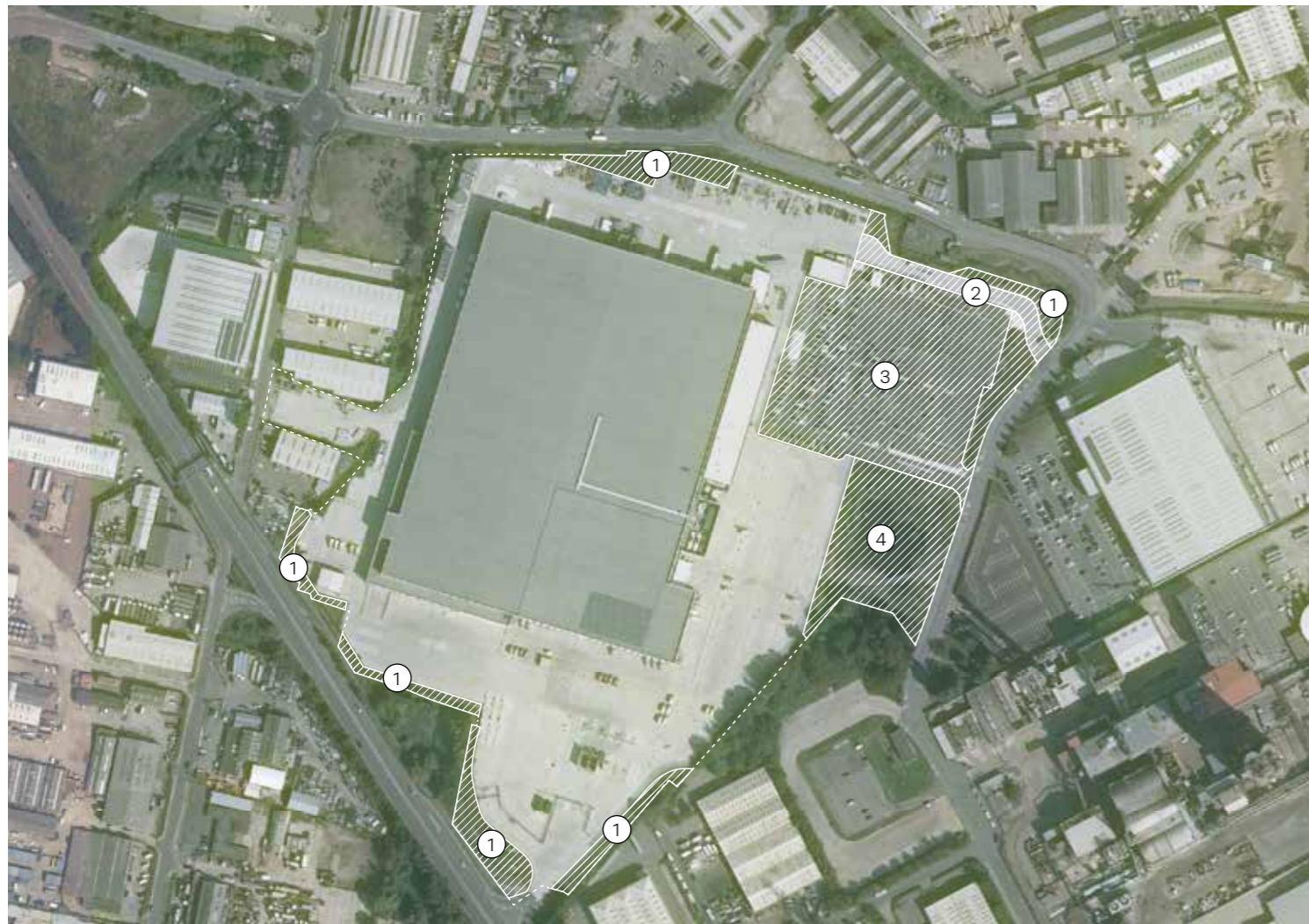
### Key

- > 0.75 Ha
- 0.75 Ha - 1.75 Ha
- > 1.75 Ha



## 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.

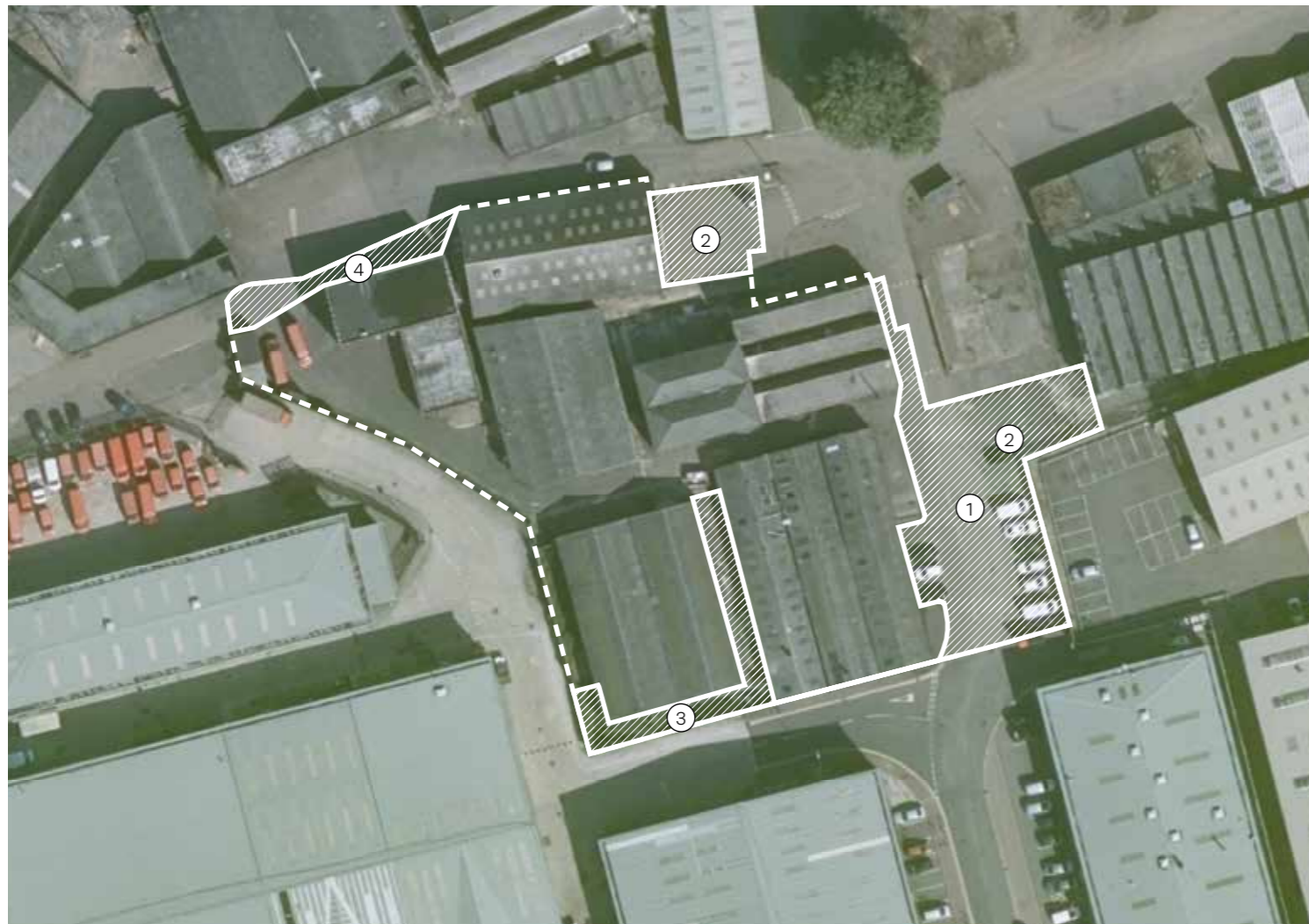


**4 Balancing Pond**

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

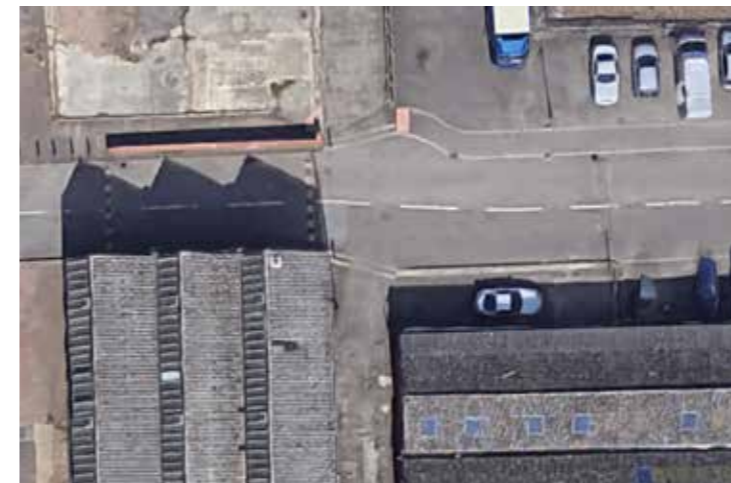
## Industrial Land Audit External Operational Area

The example below shows how the same exercise 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)

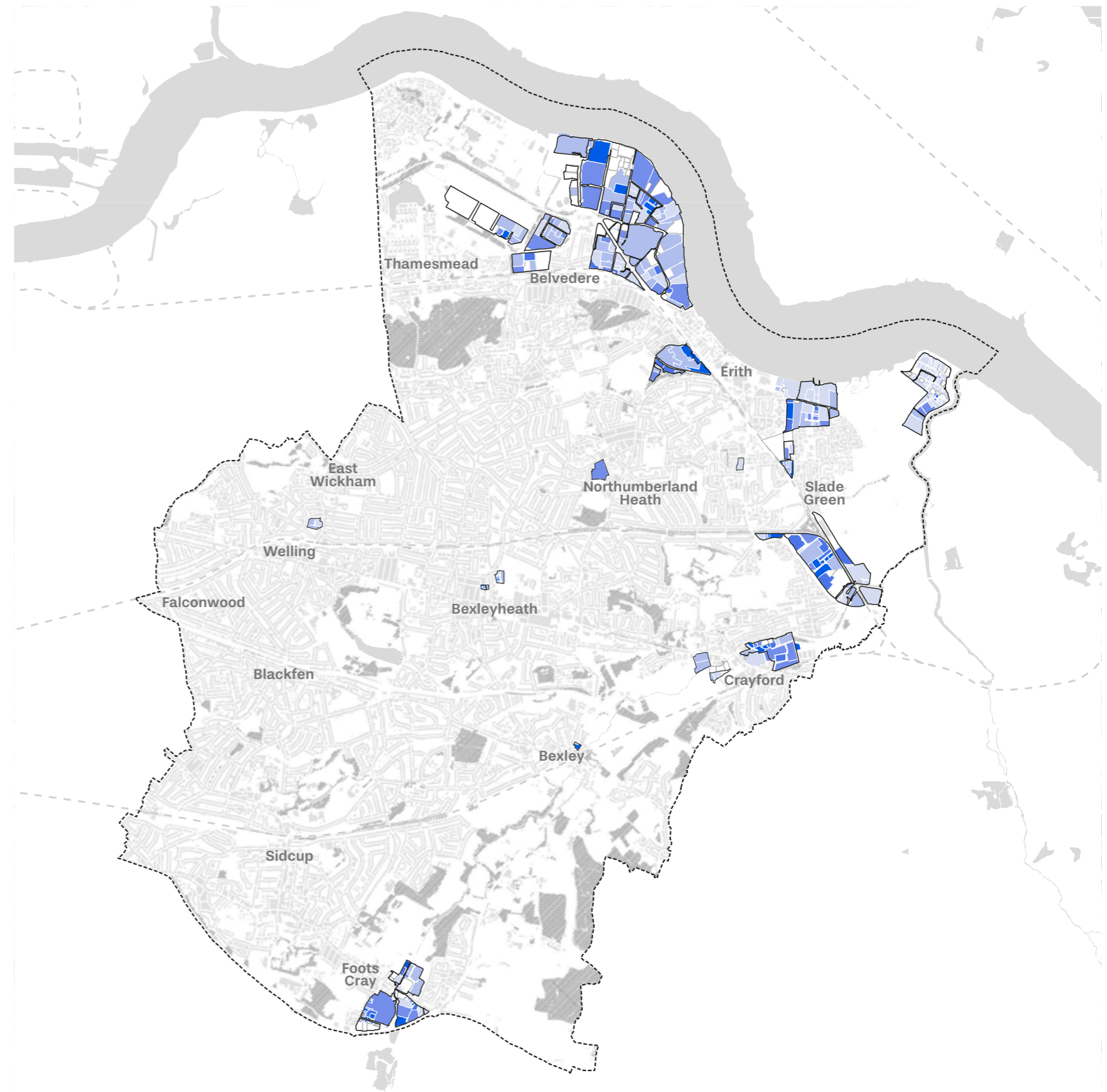
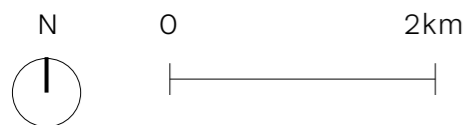
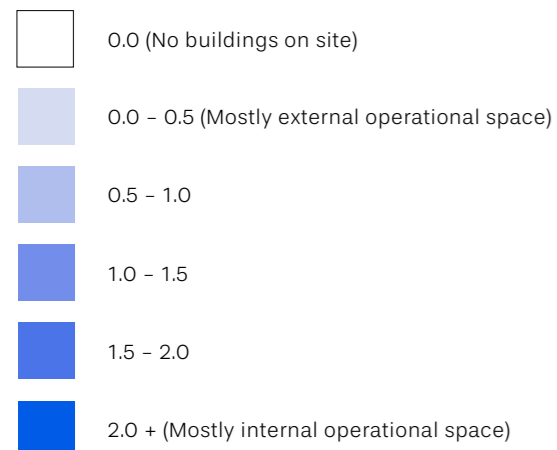
### Relevance For Intensification

- 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.

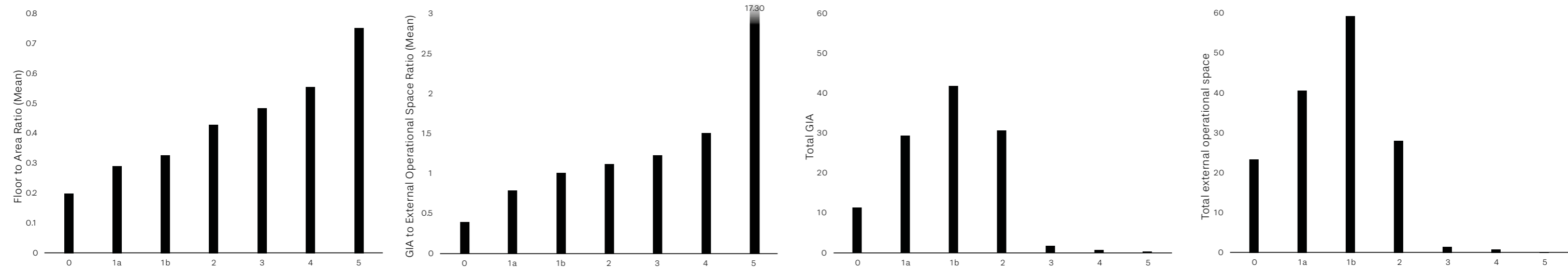
### Key



# Industrial Land Audit

## Operational Area Ratio (GIA : External Operational Space)

### Site usage by PTAL



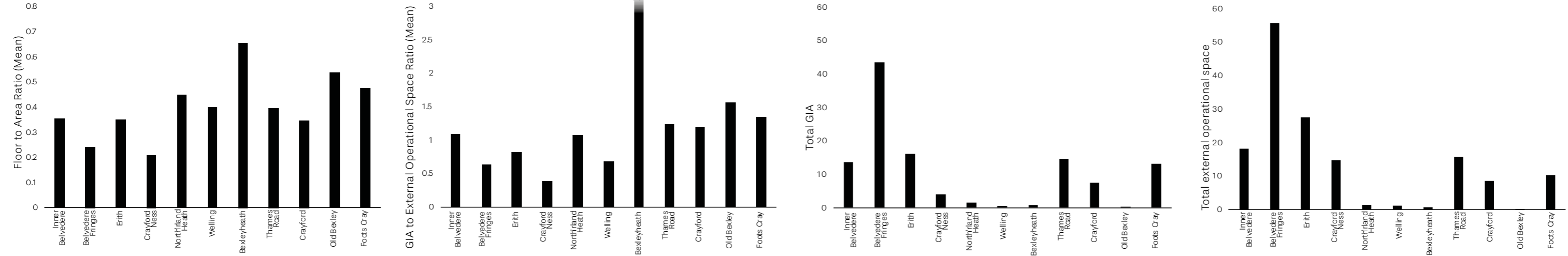
FAR increases in a linear correlation with PTAL across industrial sites.

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 Old Bexley 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

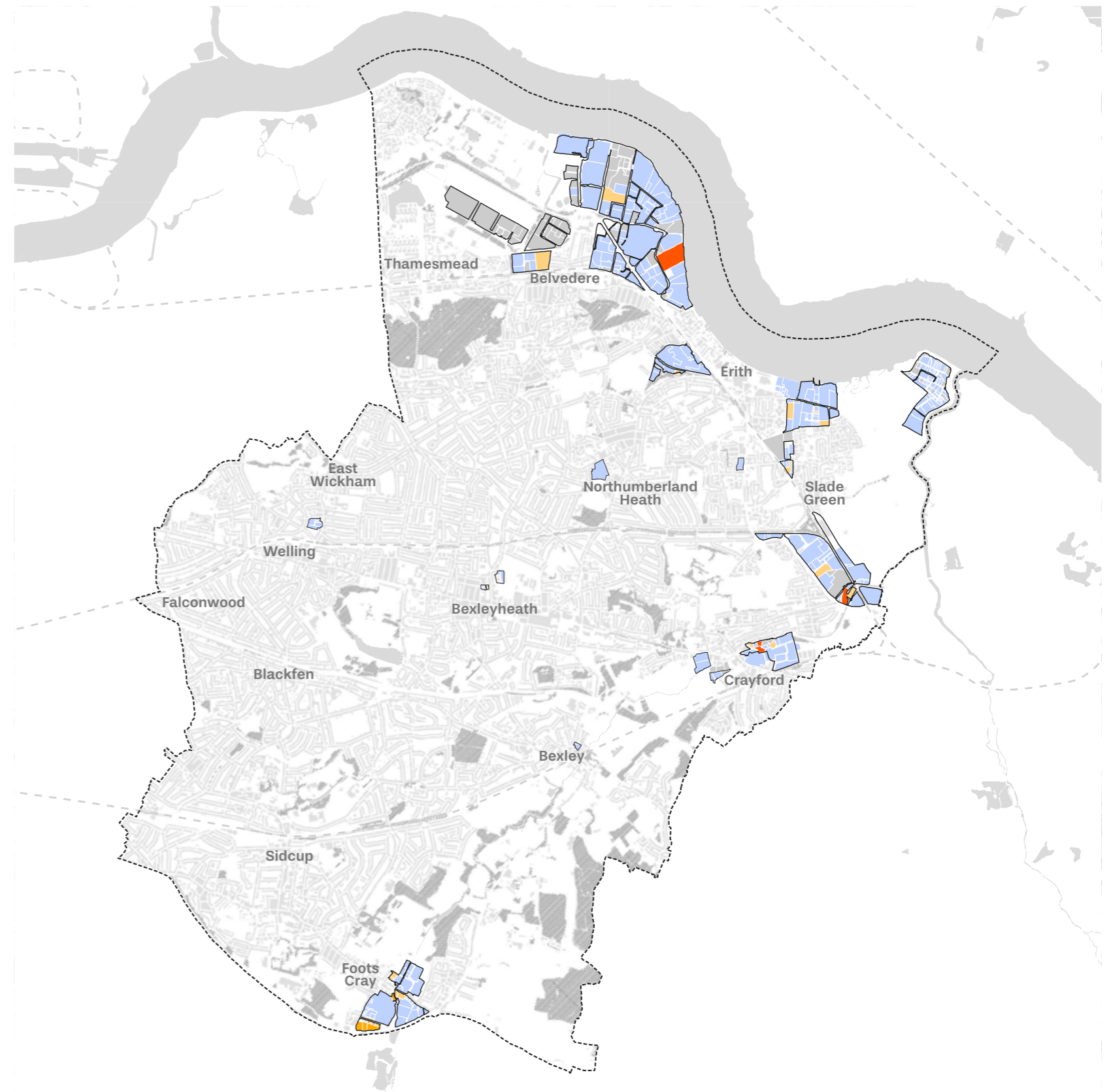
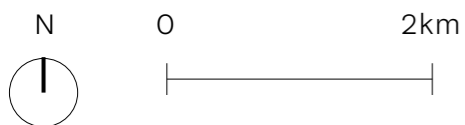
- Where sites contain buildings that are derelict or vacant, these sites could provide opportunities for infill development at higher densities than existing fabric.
- Where a site is wholly derelict or vacant these sites could support comprehensive redevelopment.

### General Pattern

- Few derelict or 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



## 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

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.

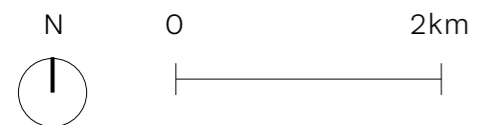
### Summary Of Business Interviews

| Expand | Relocate | Stay |
|--------|----------|------|
| 22%    | 12%      | 66%  |

### Key

-  Expand
-  Relocate
-  Stay
-  Unknown

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



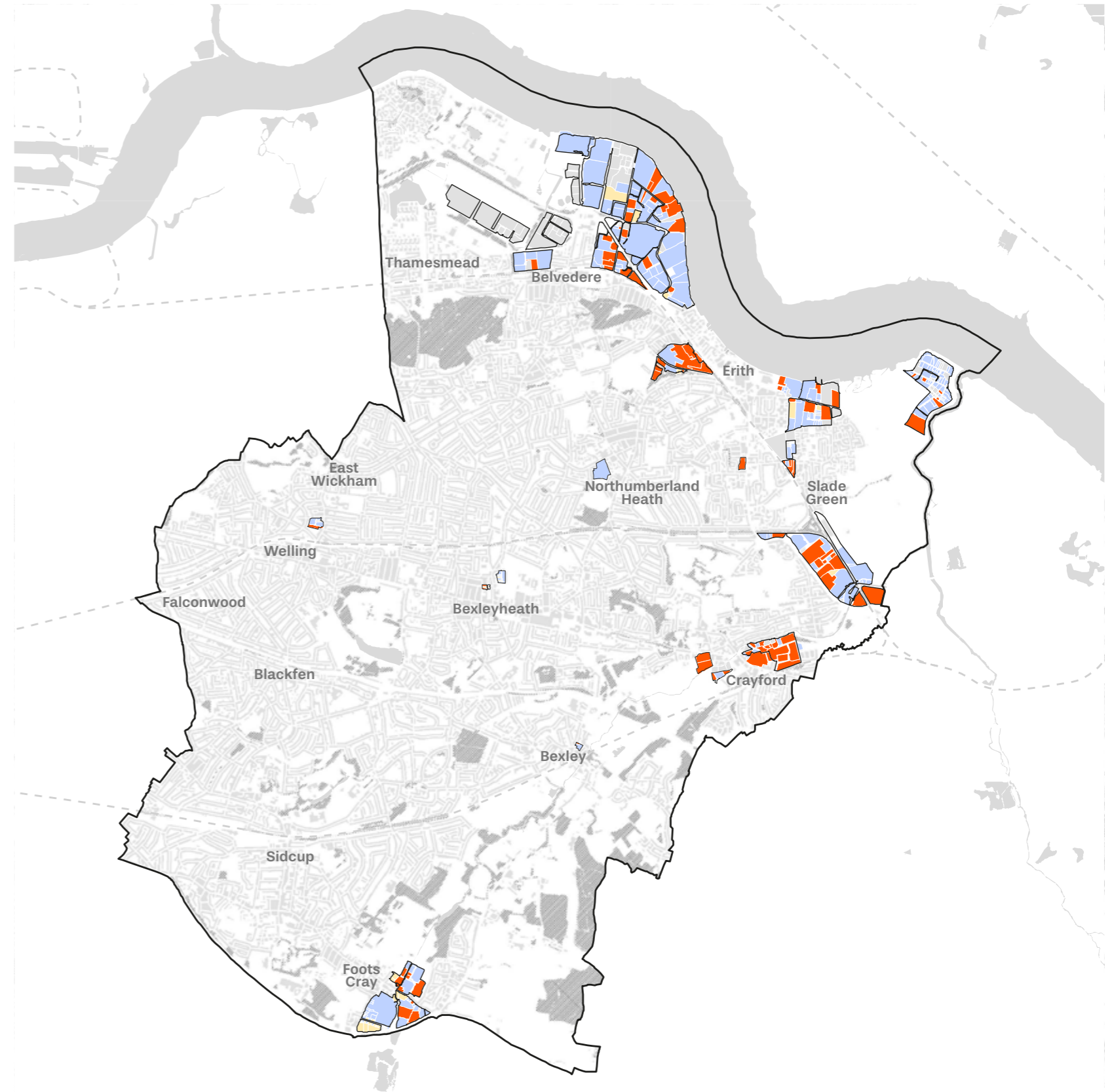
## Industrial Land Audit Multiple Occupation On Site

### 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.



## Industrial Land Audit Environmental Impact of Industrial Activities

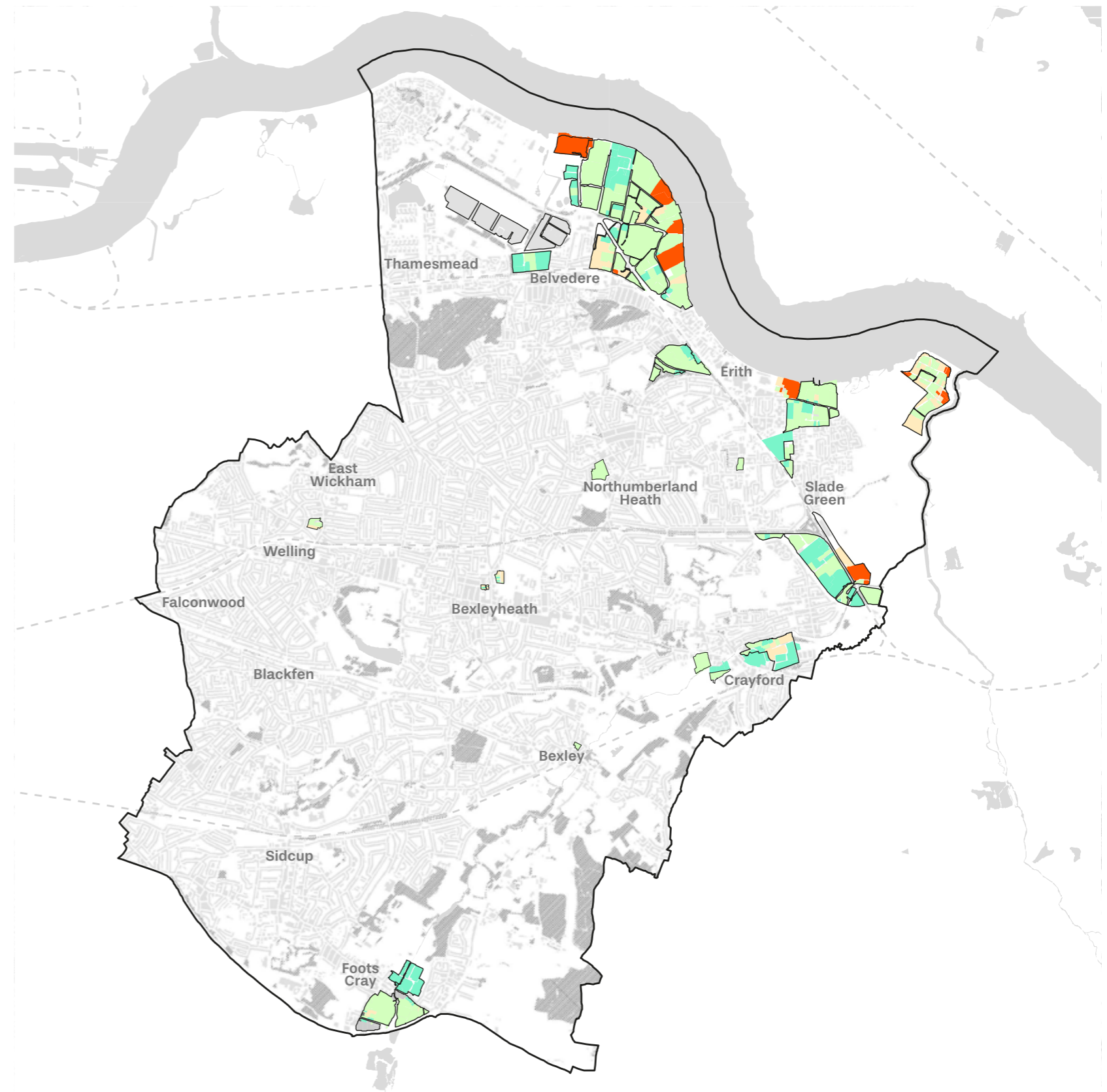
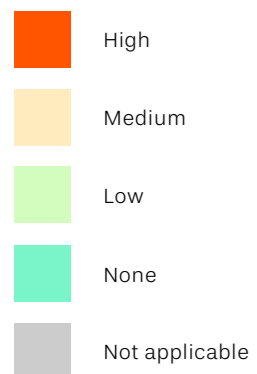
### Relevance For Intensification

- 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



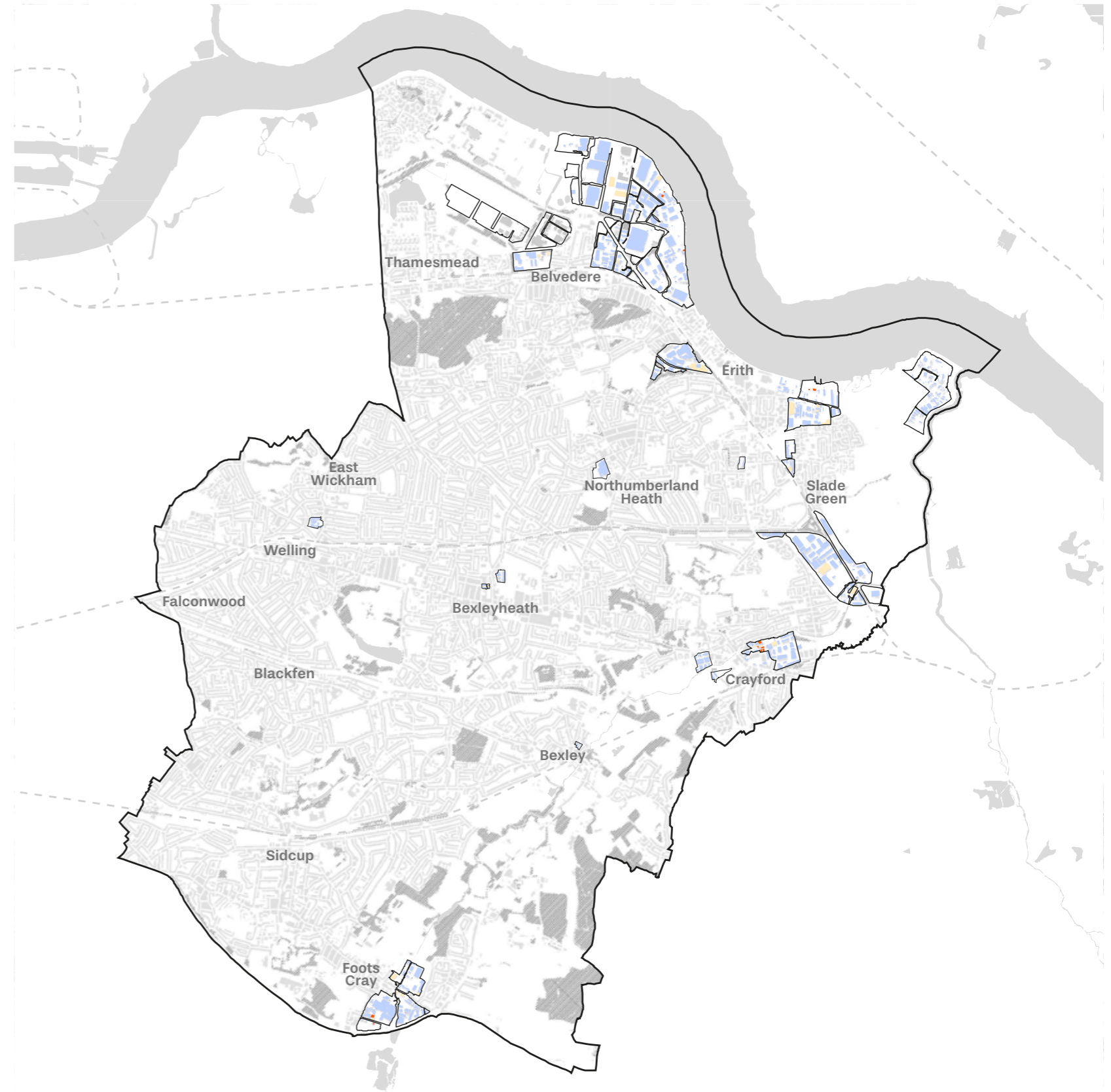
## Industrial Land Audit Building Occupancy

### 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.

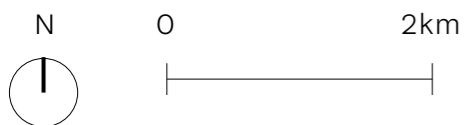
### General Pattern

- 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



## Industrial Land Audit Building Types/Age










### Relevance For Intensification

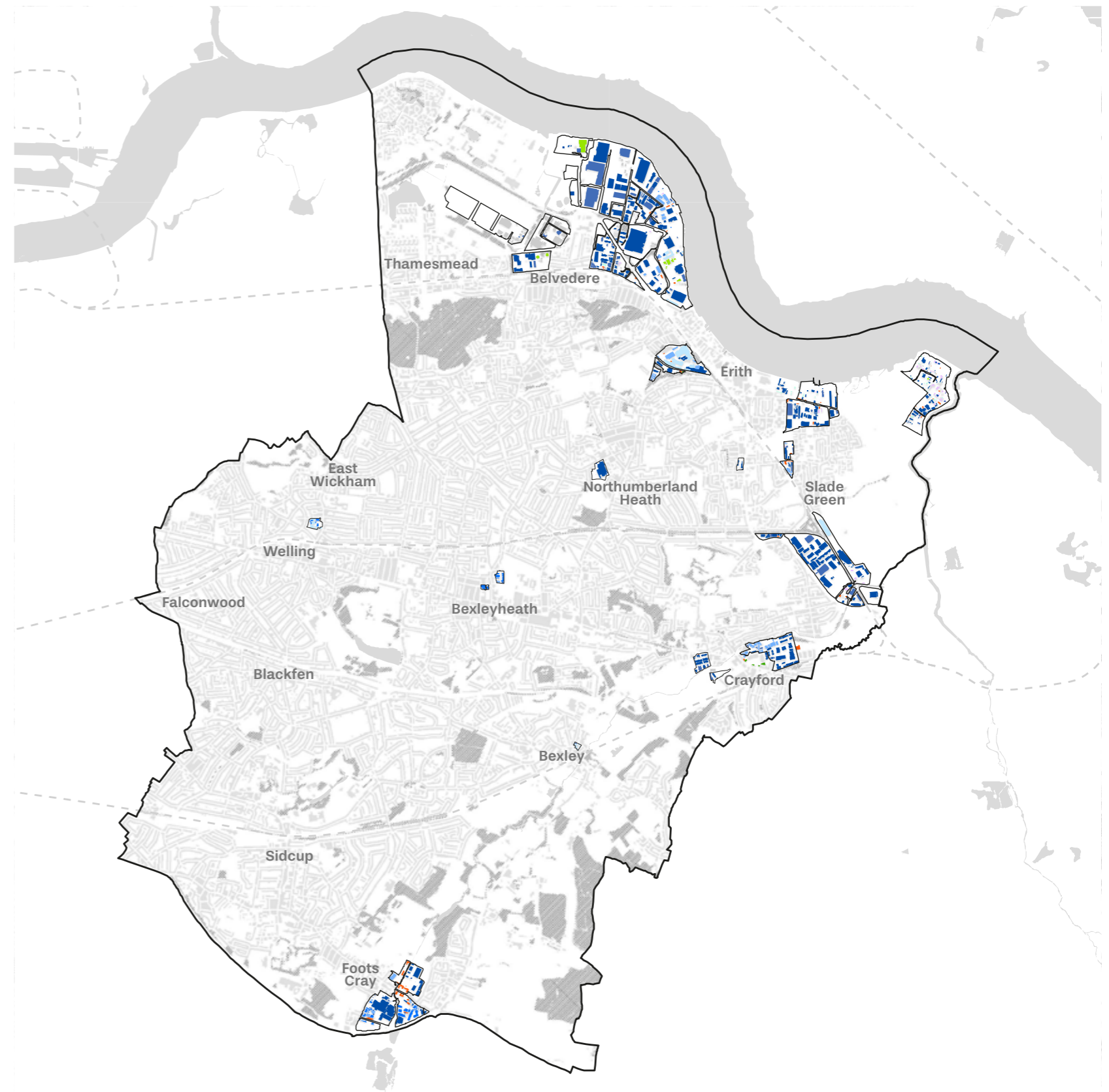
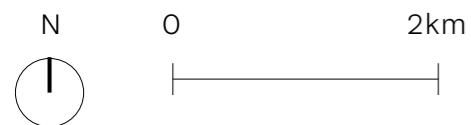
- Older building stock may correlate to low existing use value and hence identify areas where development may be more viable.
- Older building stock that has heritage value is suitable for refurbishment and can attract new sectors into industrial areas.
- Areas containing existing worker amenities such 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 |  | Containers/storage |
|  | Post-1945 industrial building              |  | Shed               |
|  | Pre-1945 factory, depot or warehouse       |  | Retail             |
|  | Specialised heavy industrial hardware      |  | No data            |
|  | Offices                                    |   |                    |



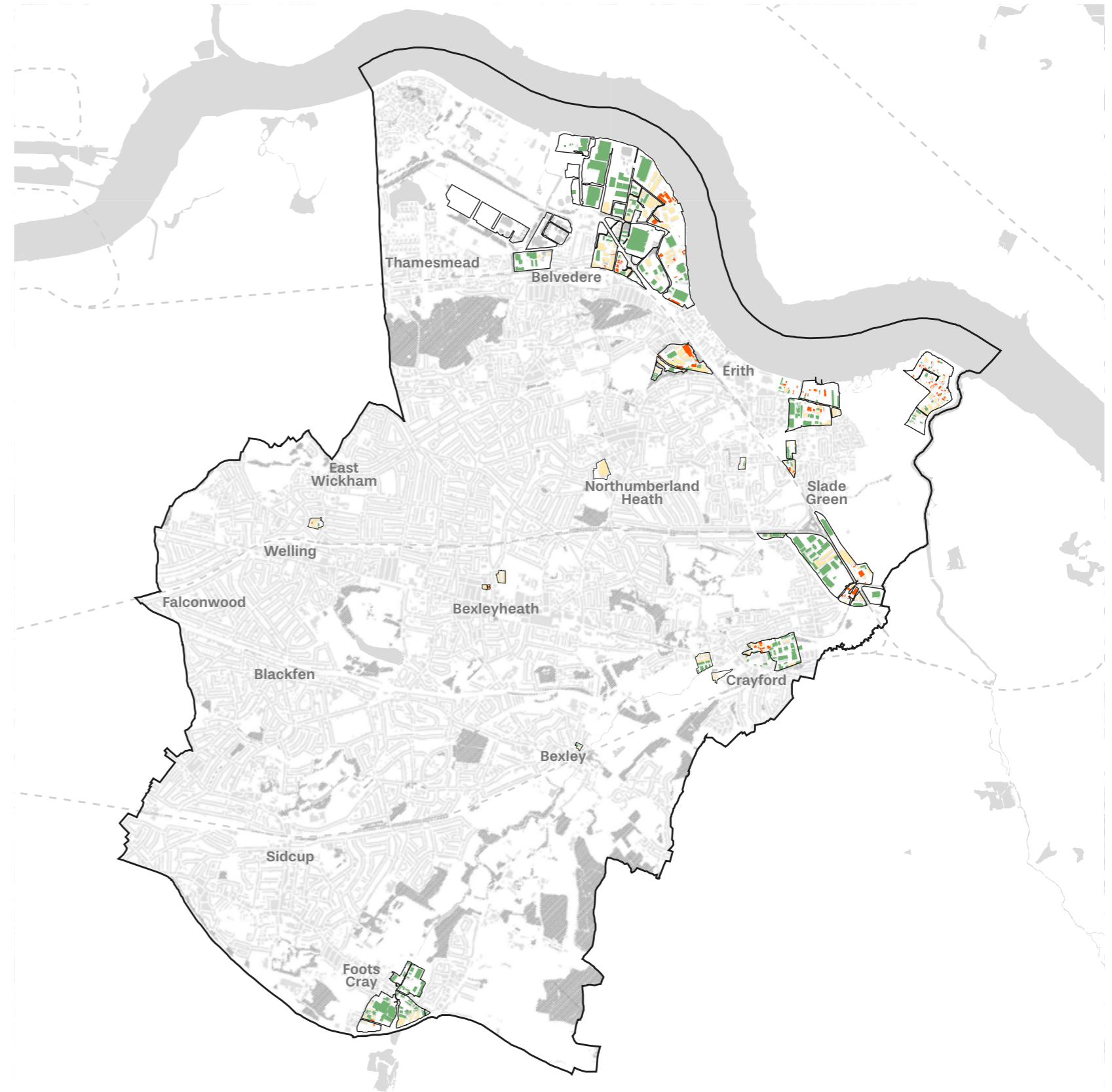
## Industrial Land Audit Condition of Floorspace

### Relevance For Intensification

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

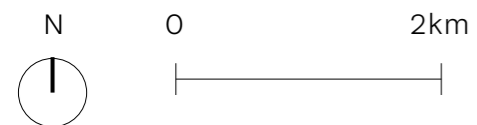
### General Pattern

- 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



## Industrial Land Audit Industrial Typology

### Relevance For Intensification

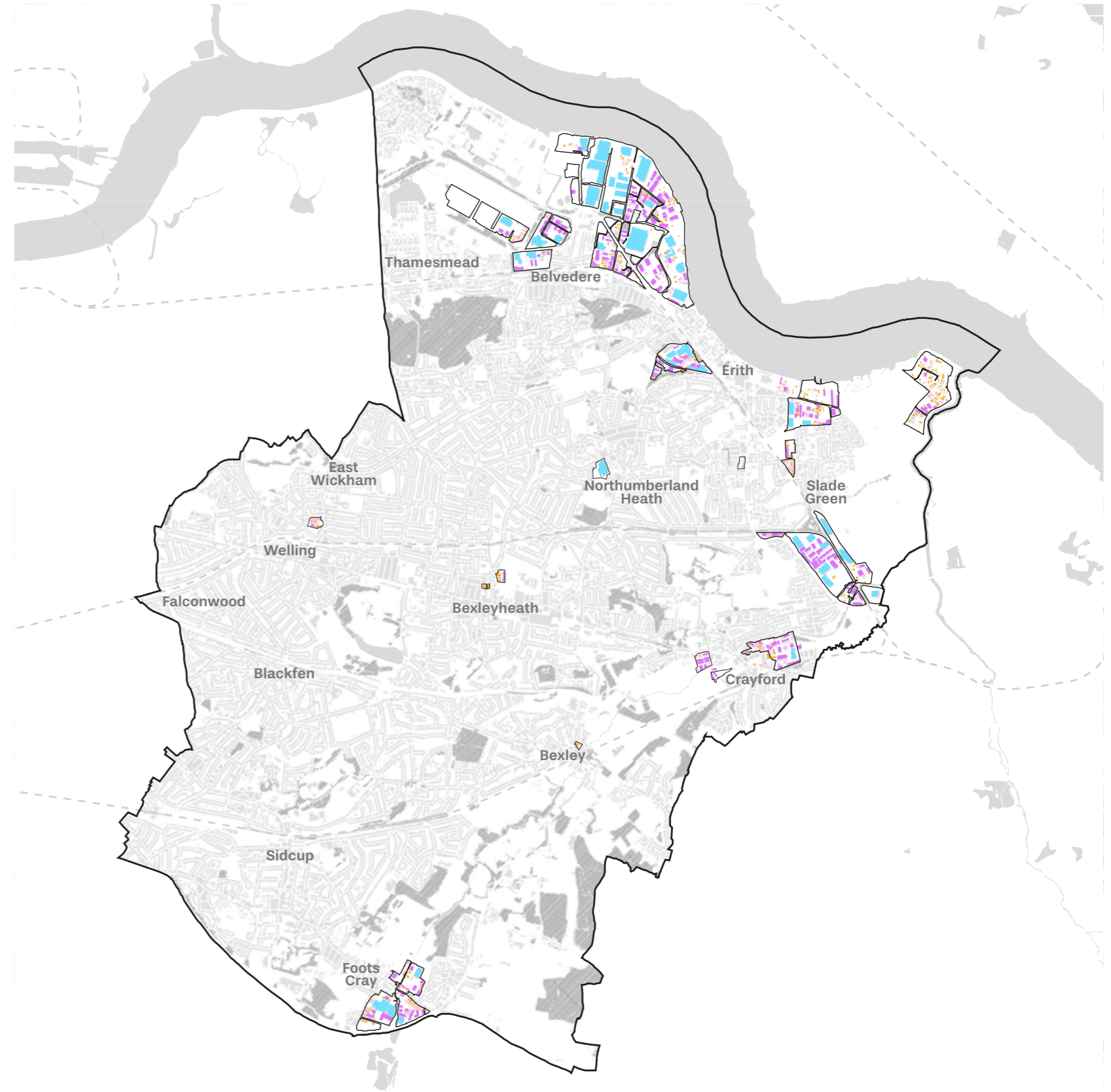
- Sites with large industrial typologies may enable infill development, particularly on irregularly shaped sites.

### General Pattern

- Large industrial types are clustered along the A206/Bronze Age Way corridor.
- LSIS 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 +)



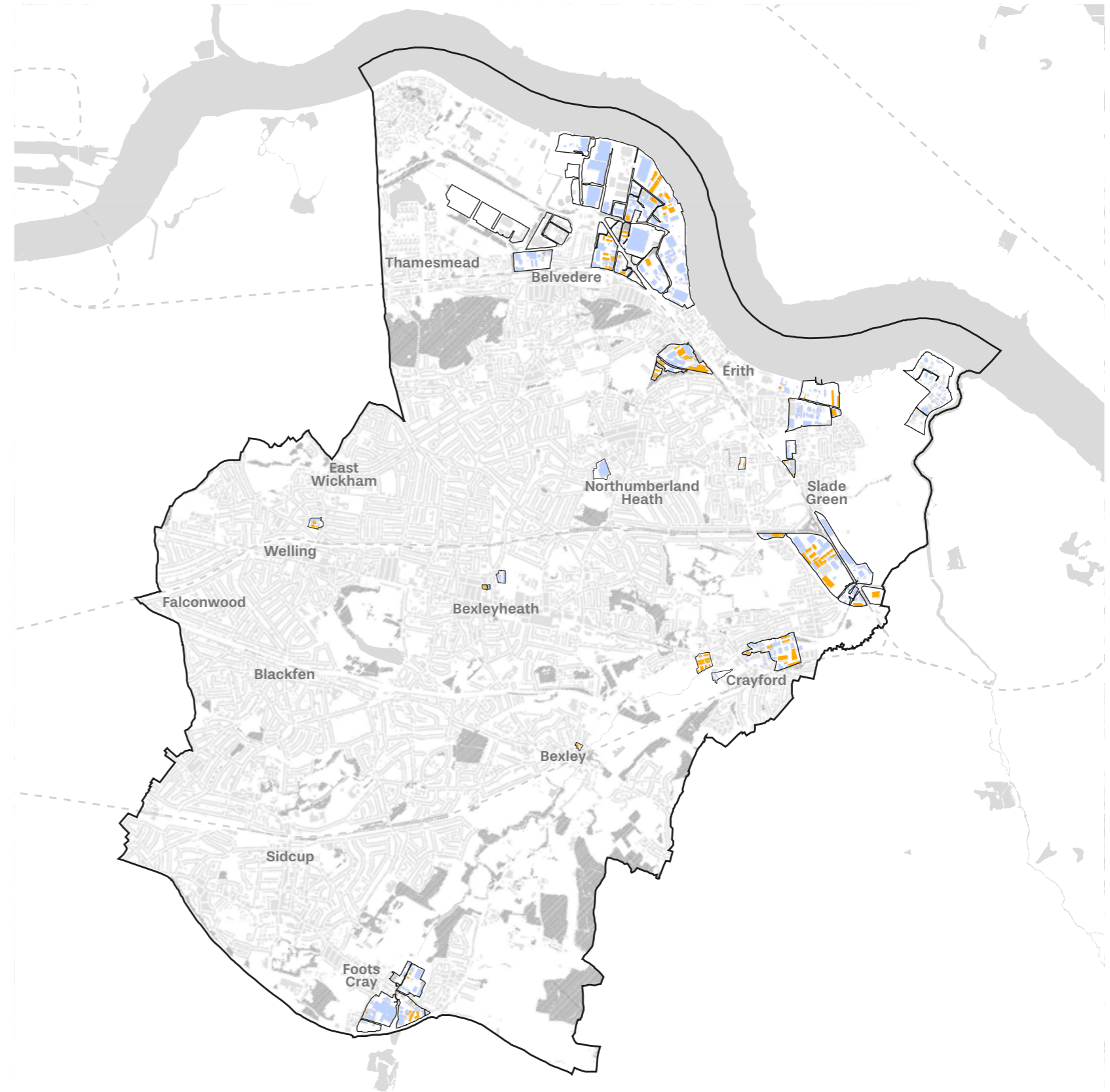
## Industrial Land Audit Buildings With Multiple Businesses

### 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.

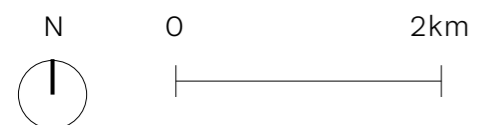
### General Pattern

- 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



## Industrial Land Audit PTAL (2021 Forecast)

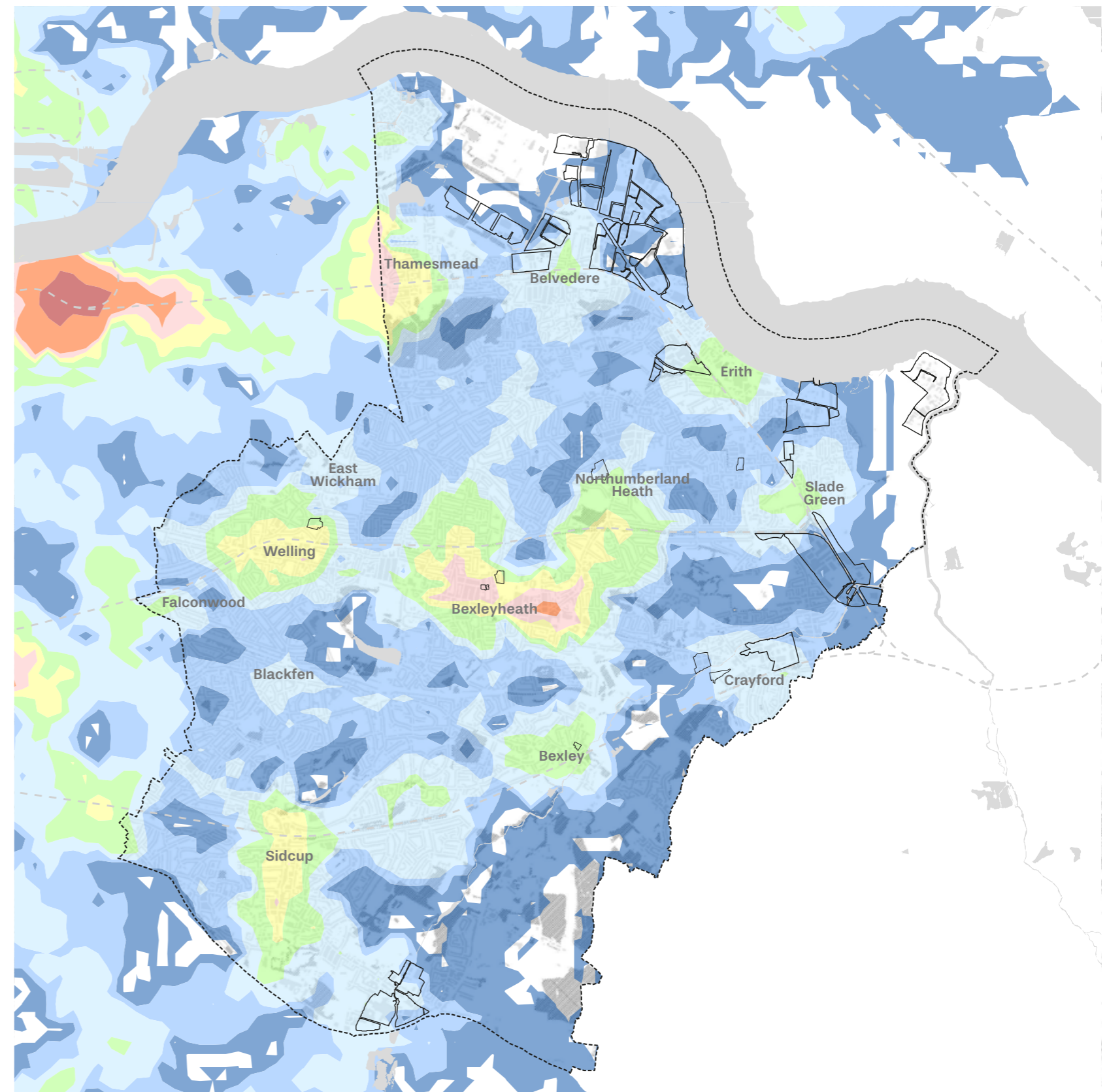
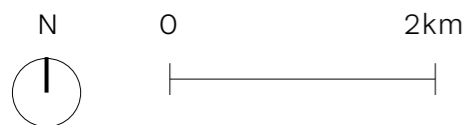
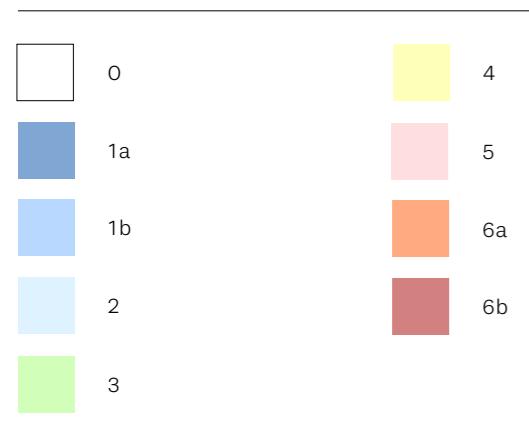
### Relevance For Intensification

- Good public transport accessibility enables higher density employment uses.
- More efficient typologies of development are possible in areas of good transport accessibility 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 falls 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



## 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 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, 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

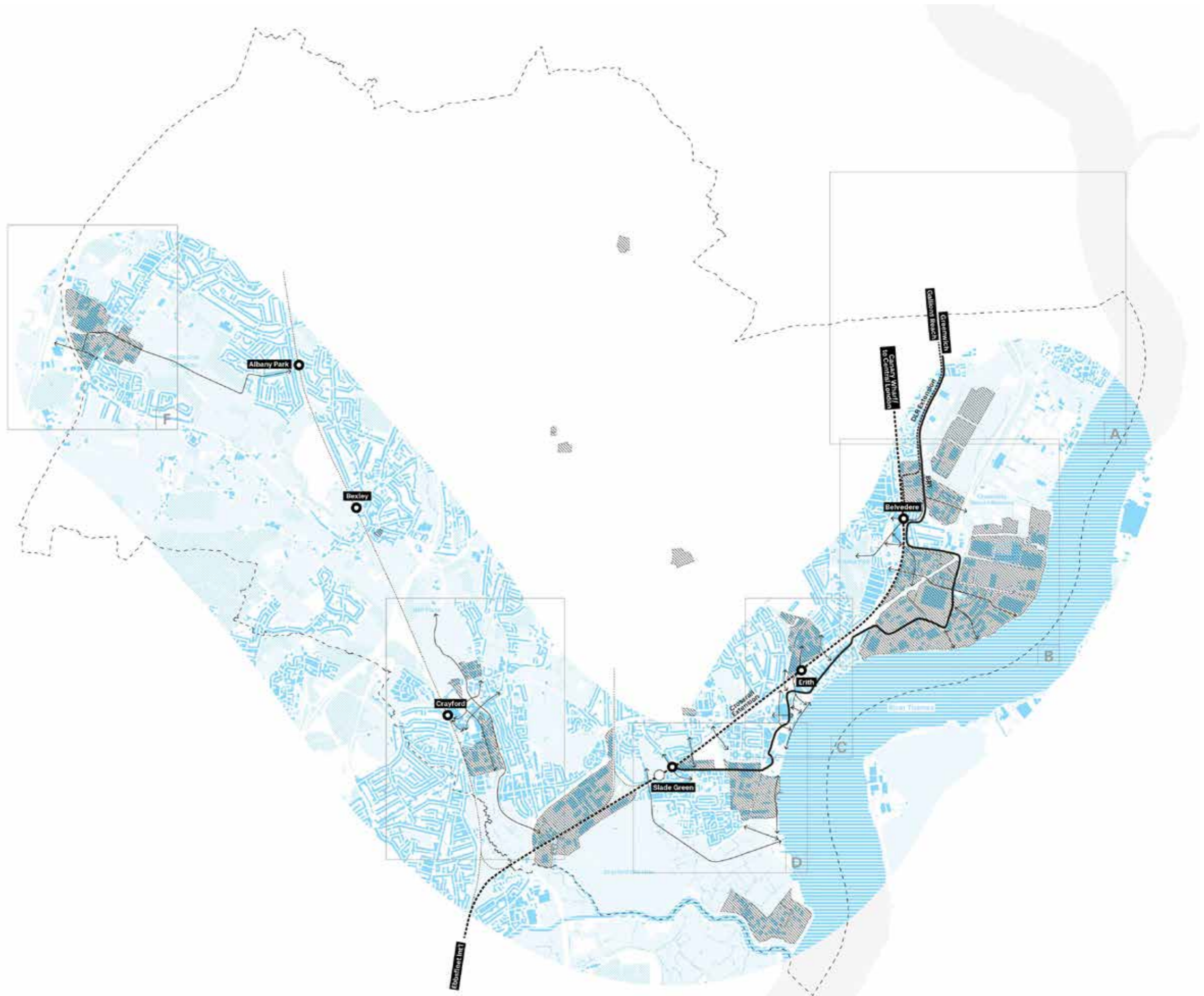
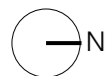
### Area F - Foots Cray

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



## Spatial Opportunities Uses

Area A – Thamesmead  
New local centre at Wilton Road, reconfigure MOL along Yarnton Way

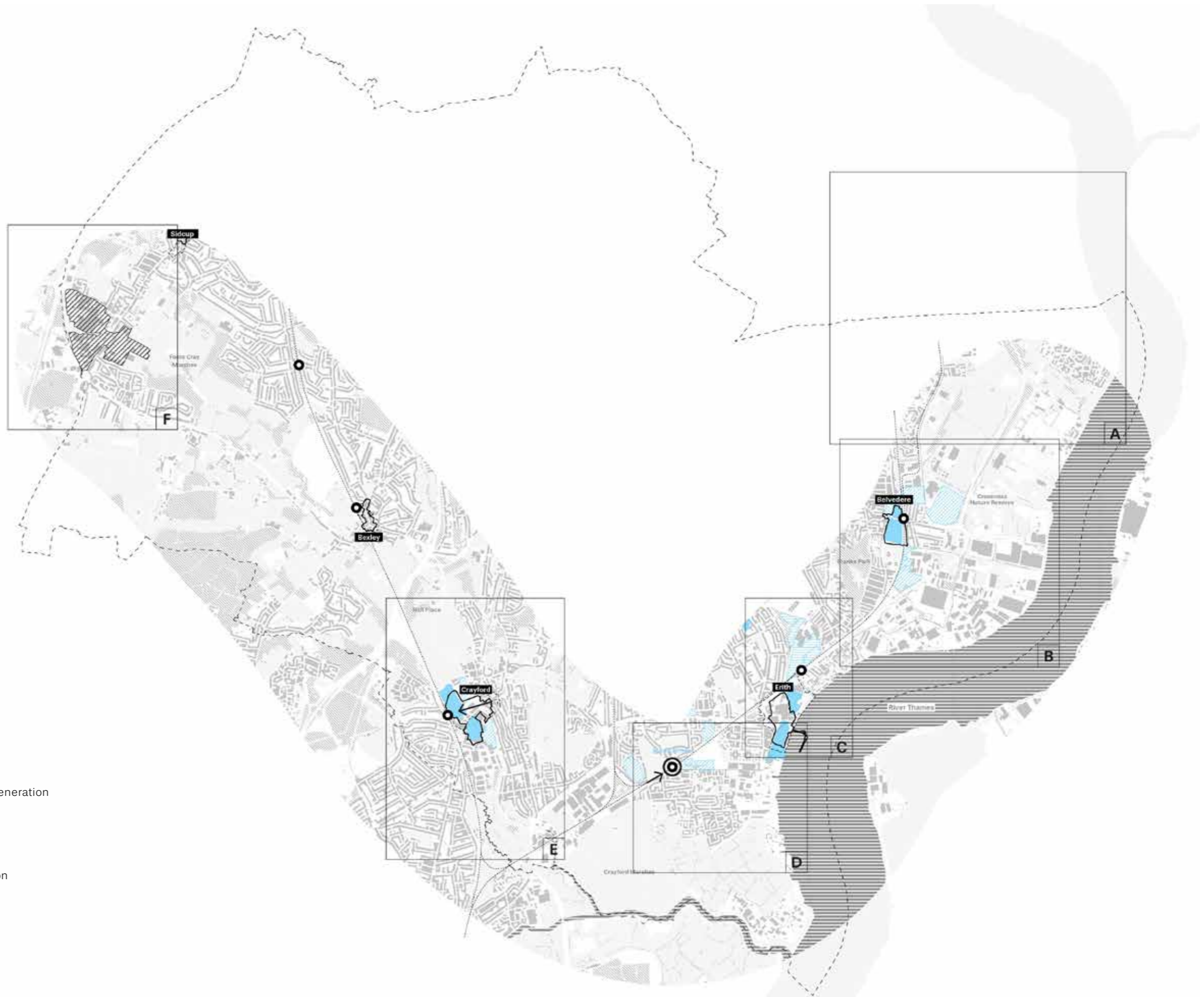
Area B – Belvedere  
Potential new mixed use centre around station

Area C – Erith  
Potential to increase mix of uses around station

Area D – Slade Green  
Reposition new local centre around station, intensify industry in the north, transition between residential areas.

Area E – Crayford  
Consolidate town centre and create more urban conditions around retail park, redevelop underused and poor quality industrial sites and improve relationship to the river.

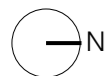
Area F – Foots Cray  
Modernise and densify employment area



### Key

|  |  |   |                               |
|--|--|---|-------------------------------|
|  | Potential Town centre boundary (Local Plan Reg 18) |  | Potential estate regeneration |
|  | Current town centre boundary                       |  | Potential residential         |
|  | Mixed use intensification                          |  | Potential Co-location         |

0 500m 2km



## 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**  
Access enhanced to existing areas across Crayford marshes, enabling release of underused green space for development in most accessible locations

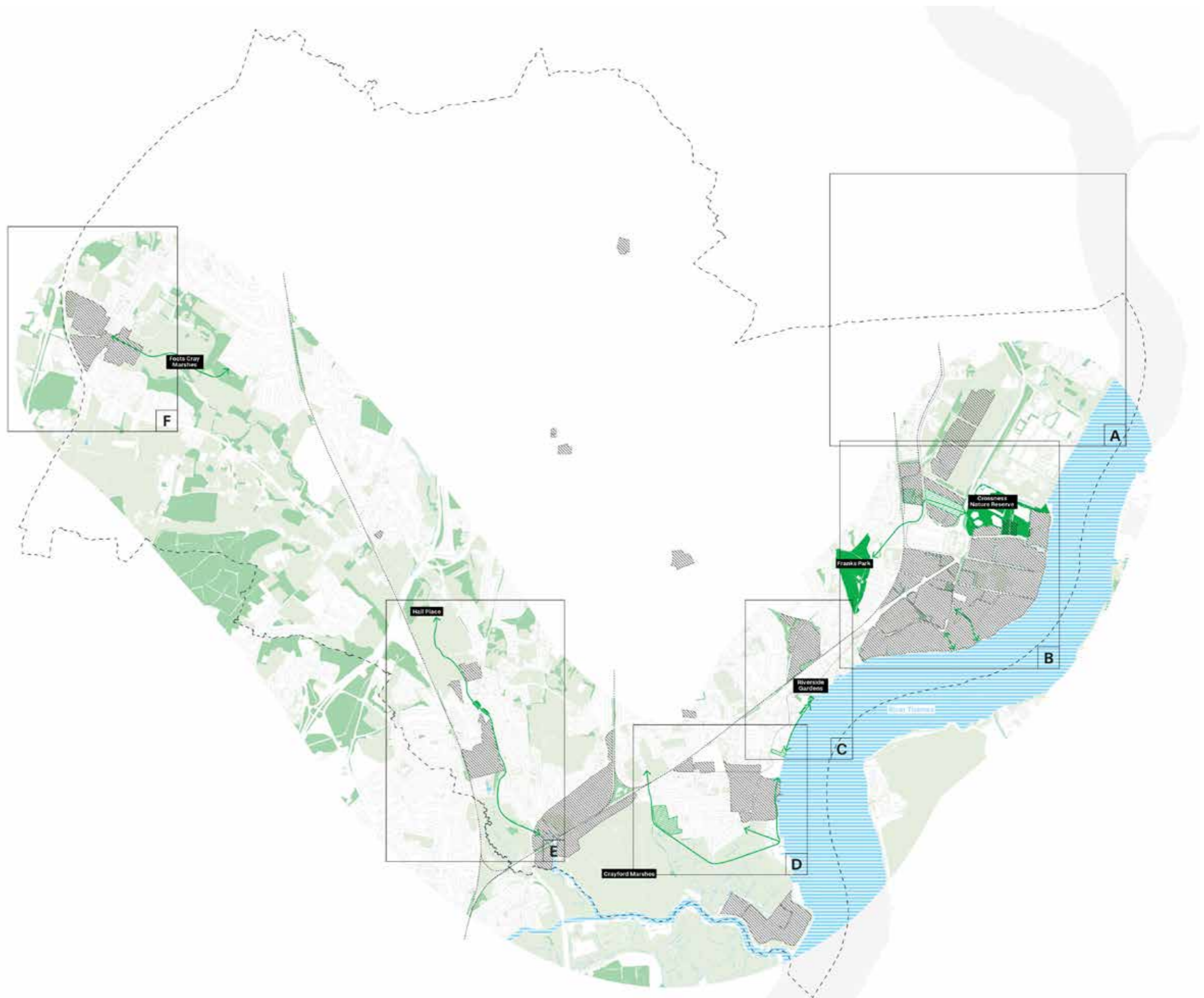
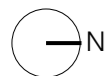
**Area E – Crayford**  
Increase connectivity along river Cray linking to larger green spaces

**Area F – Foots Cray**  
Improve connectivity between Maidstone Road and Foots Cray Meadows

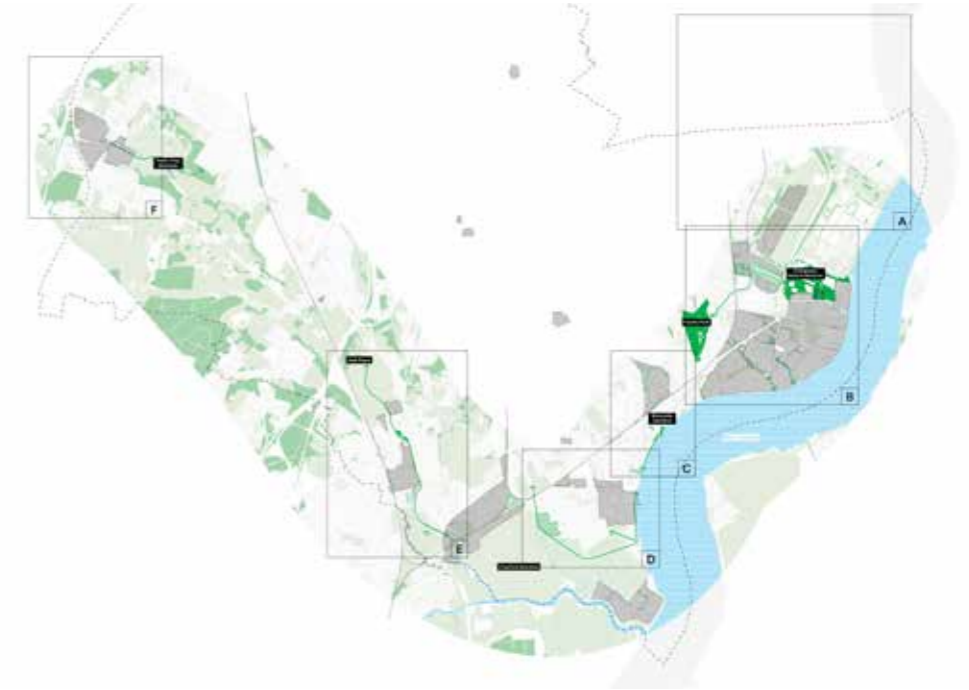
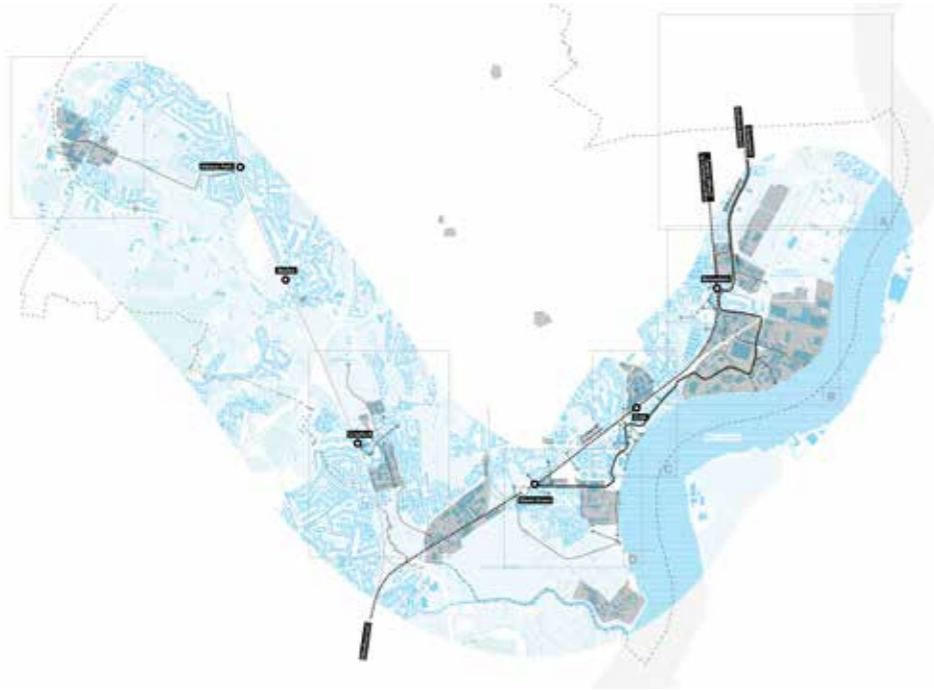
### Key

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

0 500m 2km



## 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 potential 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 Pathway 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.

## Industrial Land Audit Existing Sectors

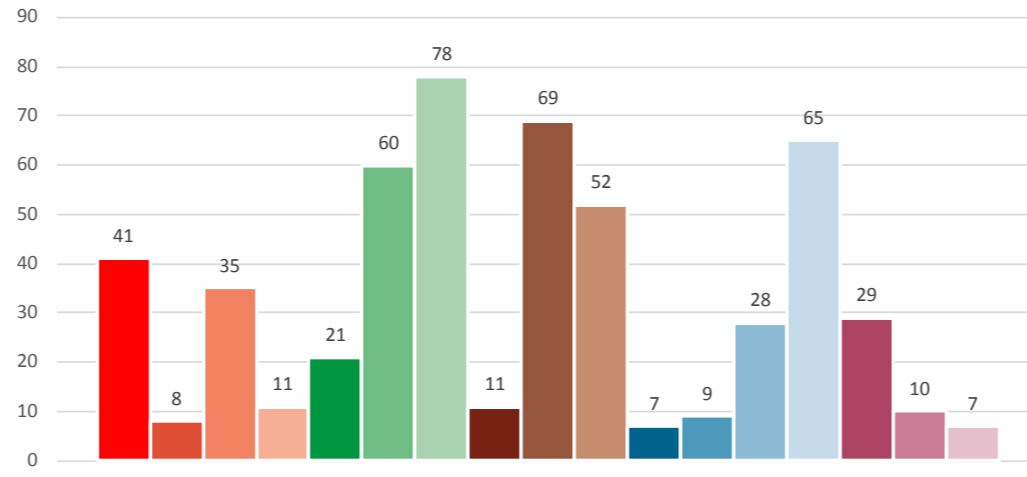
The Industrial Land Audit identifies the largest sectors within the borough's industrial areas. Given their importance to the economy of the borough, the following pages describe the spatial tendencies that are particular to each sector.

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.

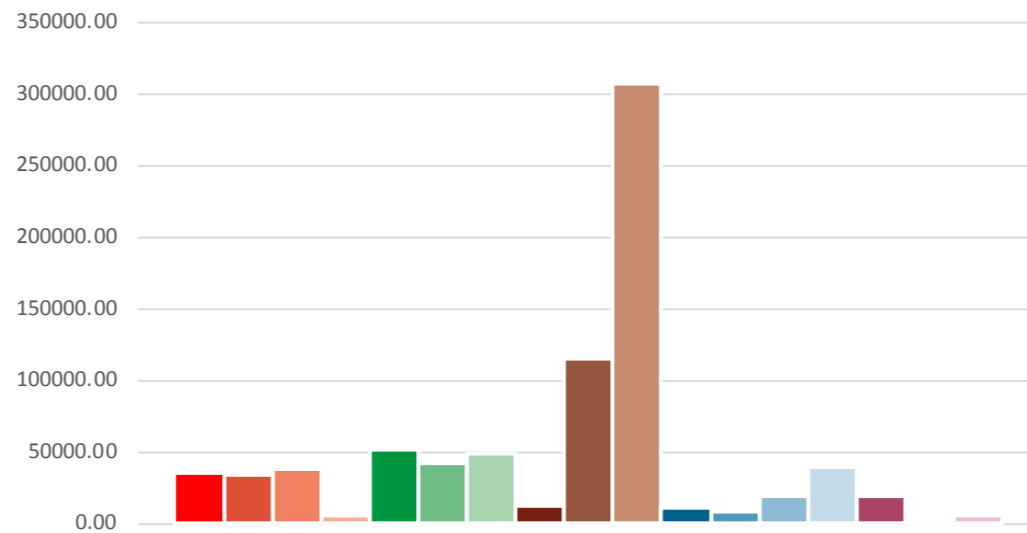
The largest sectors by number of businesses and by total employment numbers have been included:

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

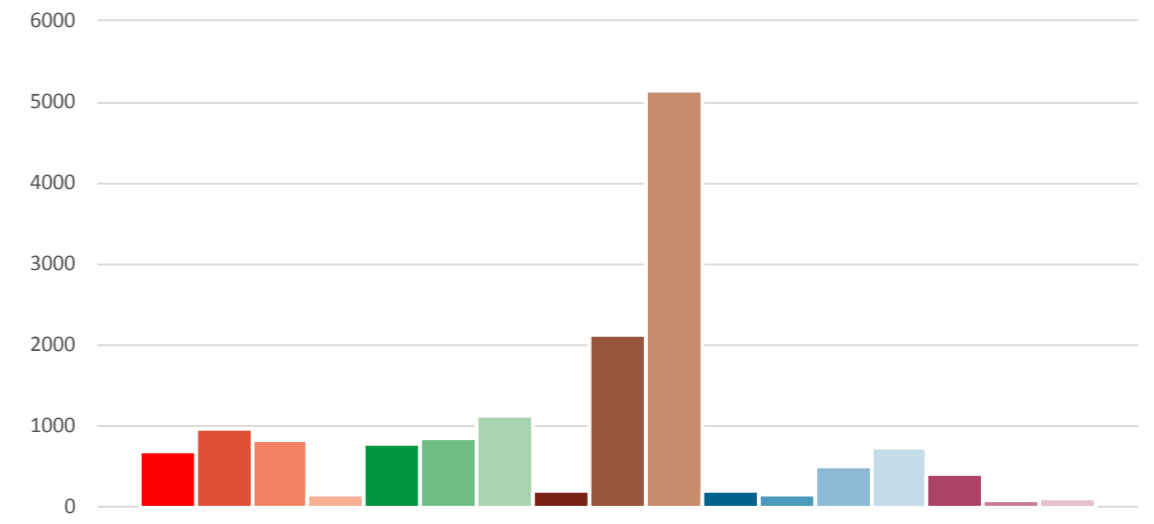
These specialisms for important elements of implementing the Strategic Outer London Development Centre (SOLDC) concept across the borough's employment land. Opportunities for intensification must take account of these clusters.



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

- Strong relationship to strategic road network, specifically Bronze Age Way and A206.
- Strong tendency towards areas with large regularly shaped sites.

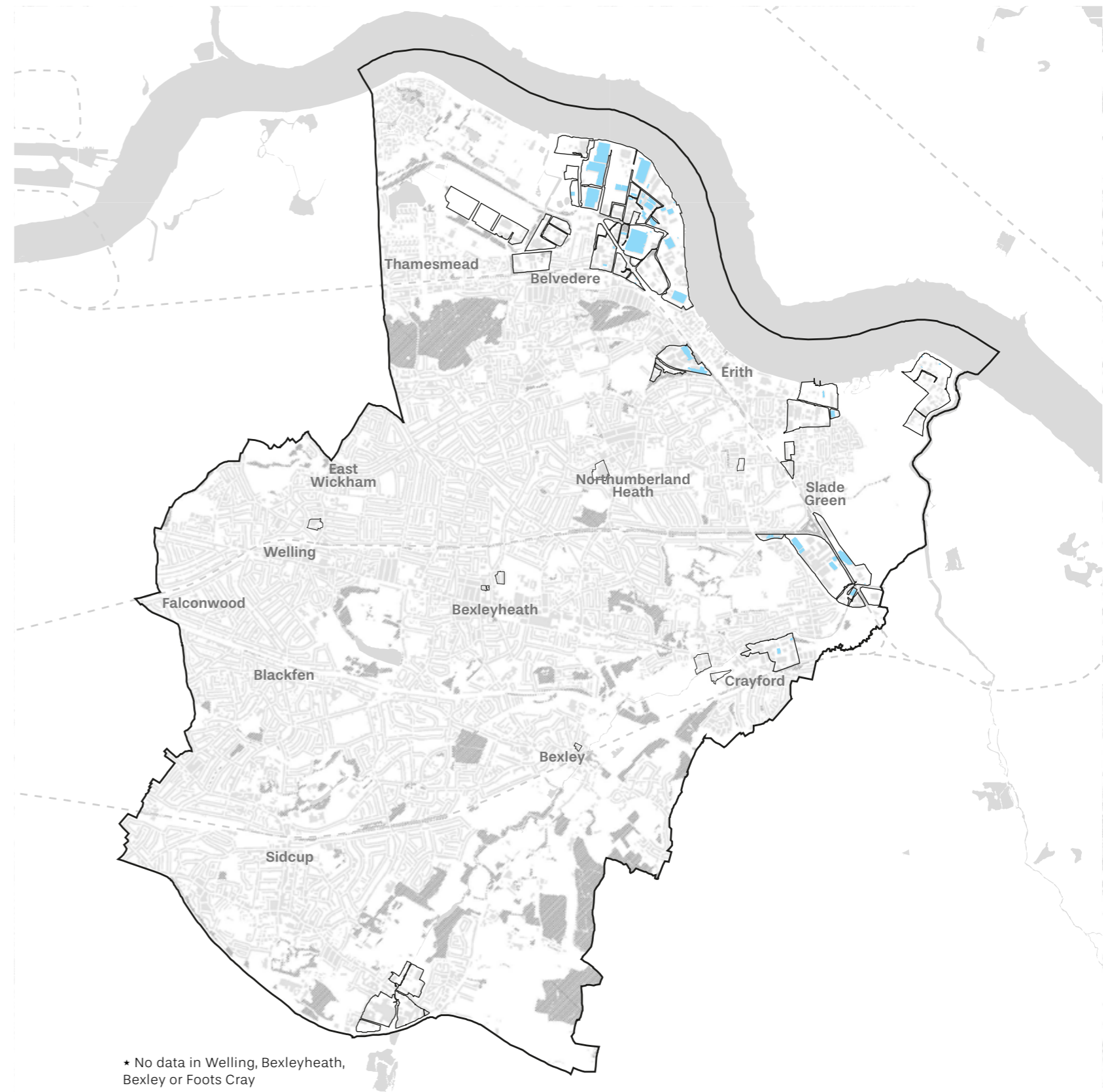
### Business surveys

#### 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



## Spatial Preferences Wholesale

### General pattern

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

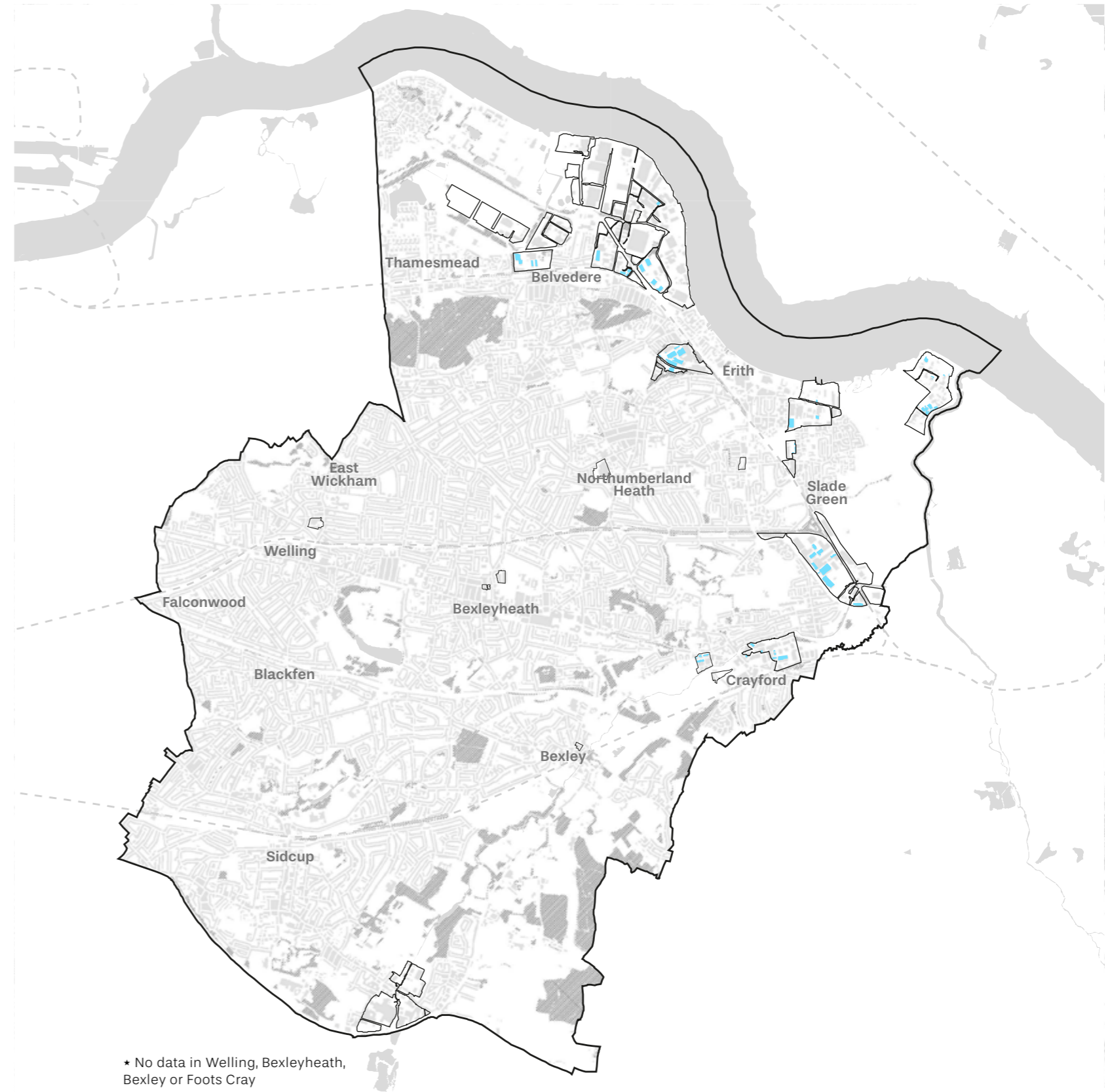
### Business surveys

#### 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



## 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?

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

#### What could be improved about the location?

- Highways improvements.



## 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



## 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 (2017) and Employment Land Review Focused Update (2021) also identifies growing sectors. Manufacturing, high tech logistics and distribution are identified as key sectors.

The Employment Land Review Focused Update (2021) also models floorspace requirement 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 Focused Update notes the strengths and weaknesses of each of these scenario.

Within the context of the NPPF requirement to plan positively for growth scenario 1 is a suitable benchmark to plan for future economic growth in the borough. As the highest of the three scenarios, basing future spatial approaches to intensification of industrial land on this option is a conservative view that will protect the borough's economy over the plan period.

The approach set out in this document will ensure that sufficient industrial land in the borough has the capacity to meet the floorspace of those uses that must be accommodated on SIL or LSIS (B2 and B8) over the plan period. This totals 136,310 sqm of floorspace, and planning for this level of growth should also take account of suitable yardspace.

This total floorspace includes an allowance for loss/ churn equivalent to the quantum of floorspace on three sites identified in the Draft Local Plan (Regulation 18 consultation) that are identified as appropriate for release (see page 88).

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 through 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 | 2. Past Completion Rates | 3. Labour Supply |
|----------------------------|------------------|--------------------------|------------------|
| Office E(g)(i)/E(g)(ii)    | 21,910           | 200                      | 11,855           |
| Light Industrial E(g)(iii) | 44,590           |                          | 25,865           |
|                            |                  | 60,220                   |                  |
| Industrial B2              | 38,640           |                          | 22,505           |
| Distribution B8            | 97,670           | 79,870                   | 56,540           |
| <b>Total</b>               | <b>202,800</b>   | <b>140,290</b>           | <b>116,760</b>   |

Gross Employment Floorspace Requirements in Bexley, 2021–2036 (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.

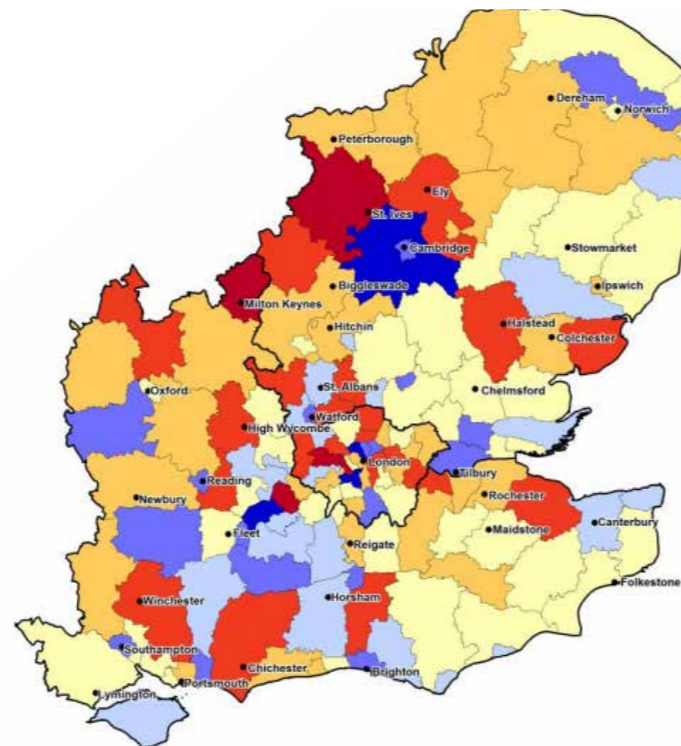
Outer London plays an important role in London's industrial economy, containing 76% of Greater London's total industrial land by land area and 69% by floorspace. Bexley is located within the east sub-region, which has both the lowest land values and the lowest intensity of uses relative to the rest of 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.

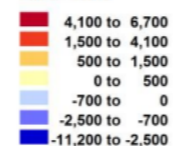
For example, local firm Truckbusters have sold used trucks and other commercial vehicles from their Erith site for decades, including repurposed specialist vehicles engineered to meet the

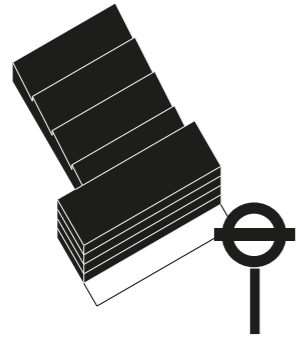
particular needs of clients. The company recently trained its engineers to use Auto-CAD to design these specialised vehicles, which has improved the quality of their product and allowed them to work more efficiently. Similarly, Dartford Composites have also begun to use Auto-CAD to refurbish train parts, which has been so successful that the company is now looking for a larger facility.

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<sup>2</sup> 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.

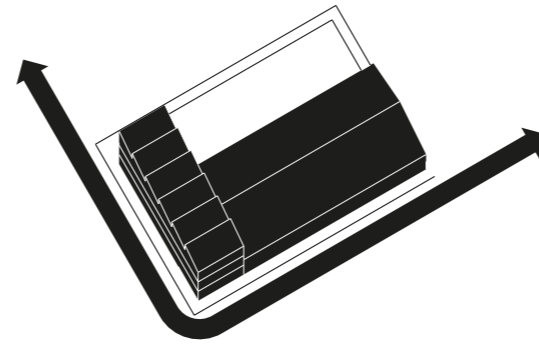
Industrial Jobs Change 2009 - 2015





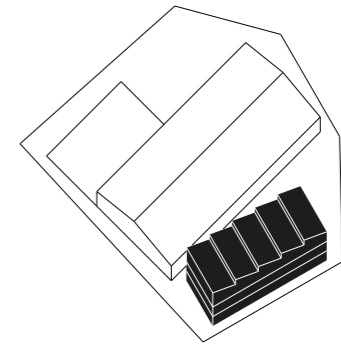
**Connectivity**

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



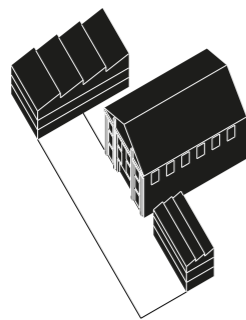
**Placemaking**

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



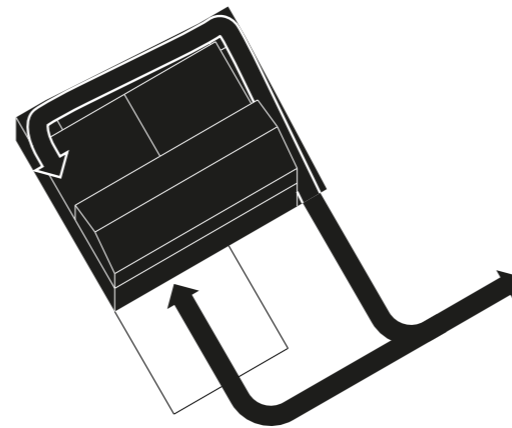
**Infill**

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



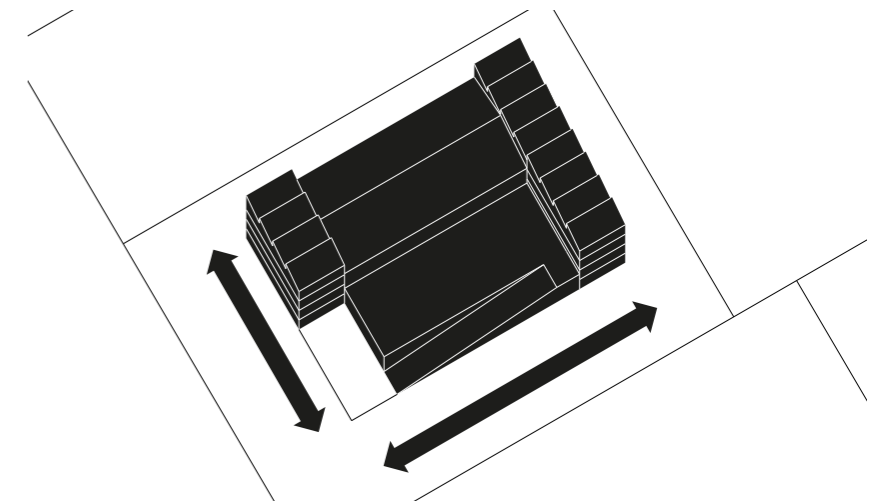
**Heritage**

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%)**



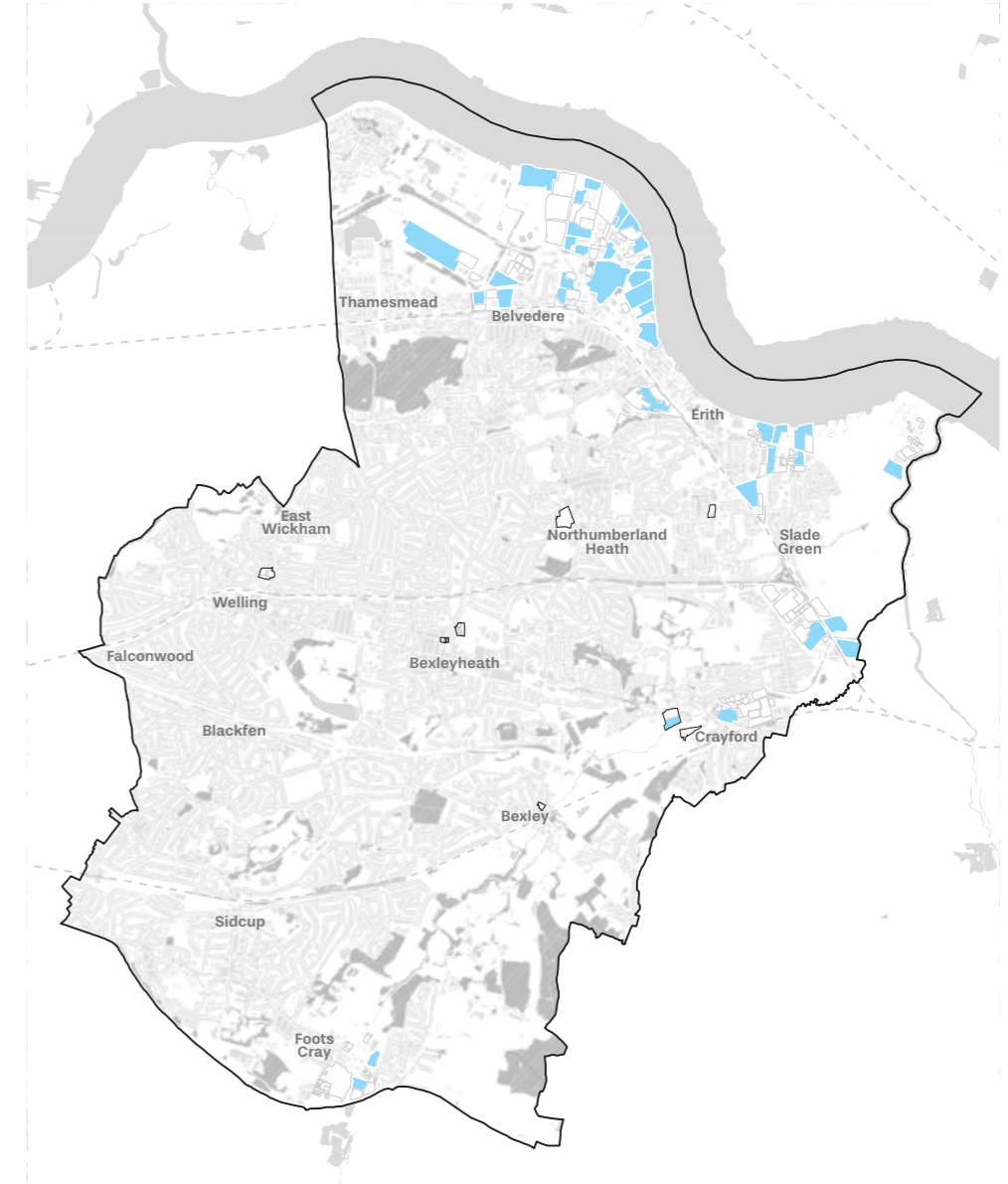
**Small Sites  
< 0.75 Ha**

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**

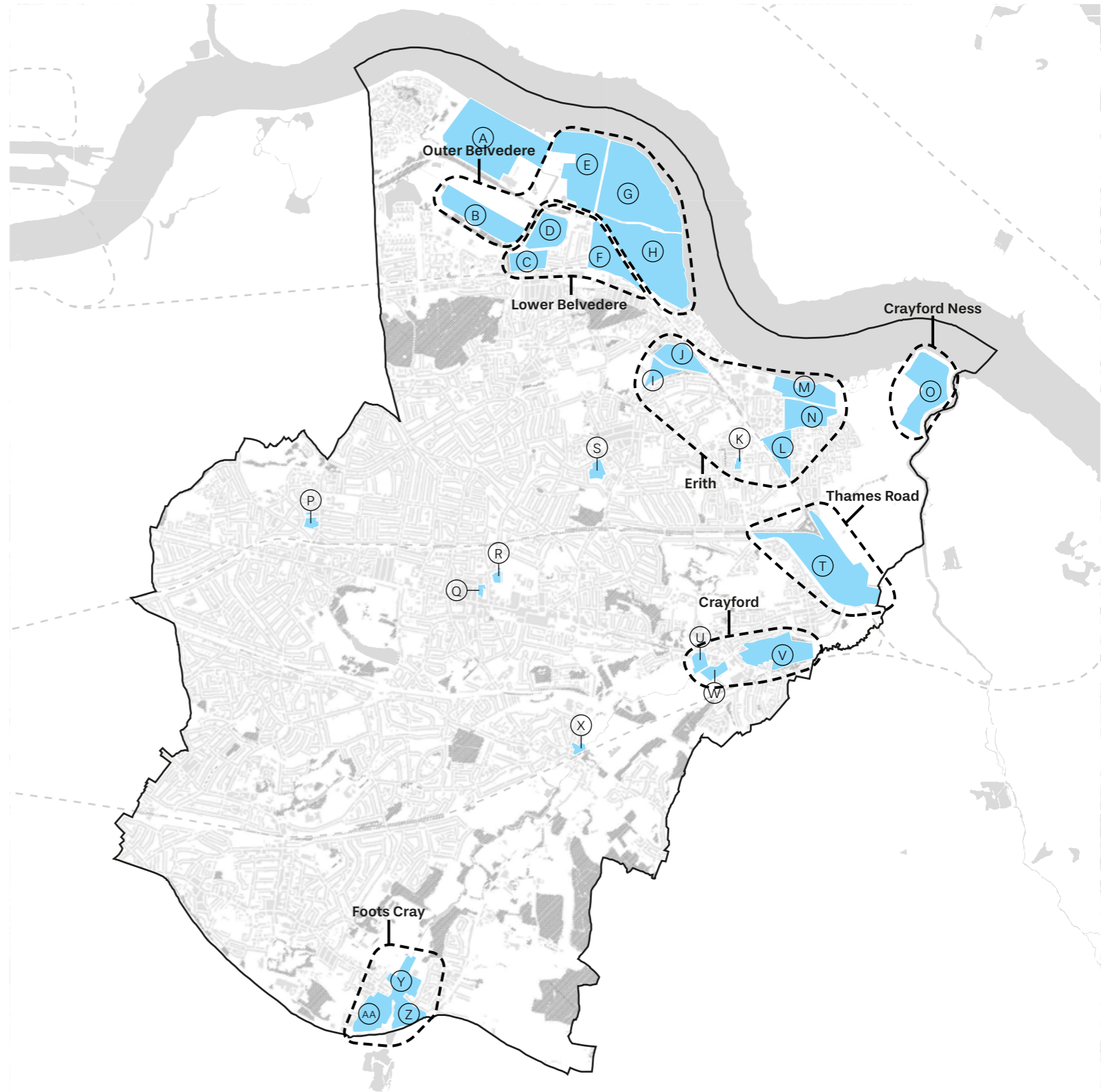
Significant opportunities exist, and can provide higher density employment space in Inner Belvedere, Erith and Foots Cray. Sites in less accessible areas can be suitable for stacked industrial typologies providing workspace that typically supports lower employment densities. Suitable sites are found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

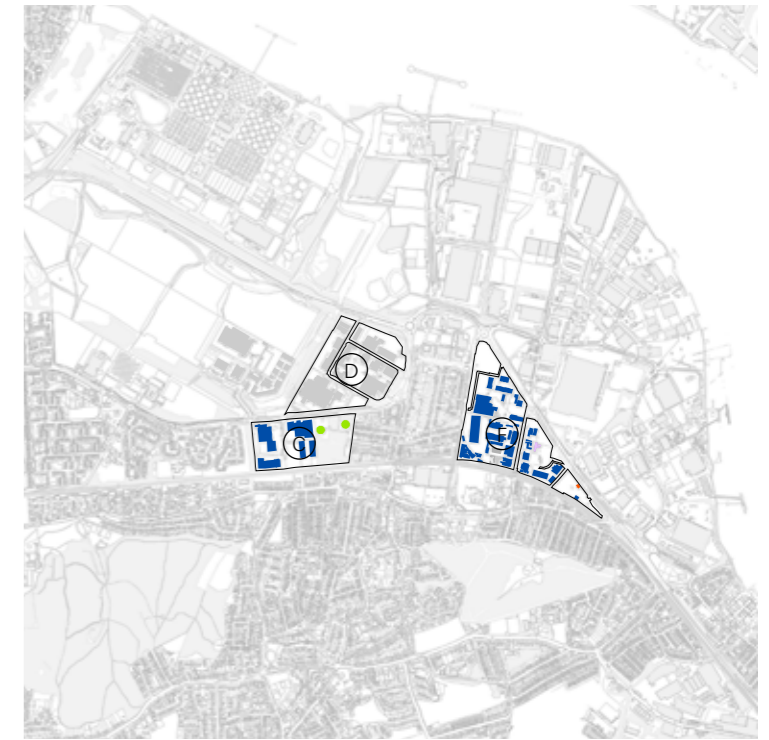
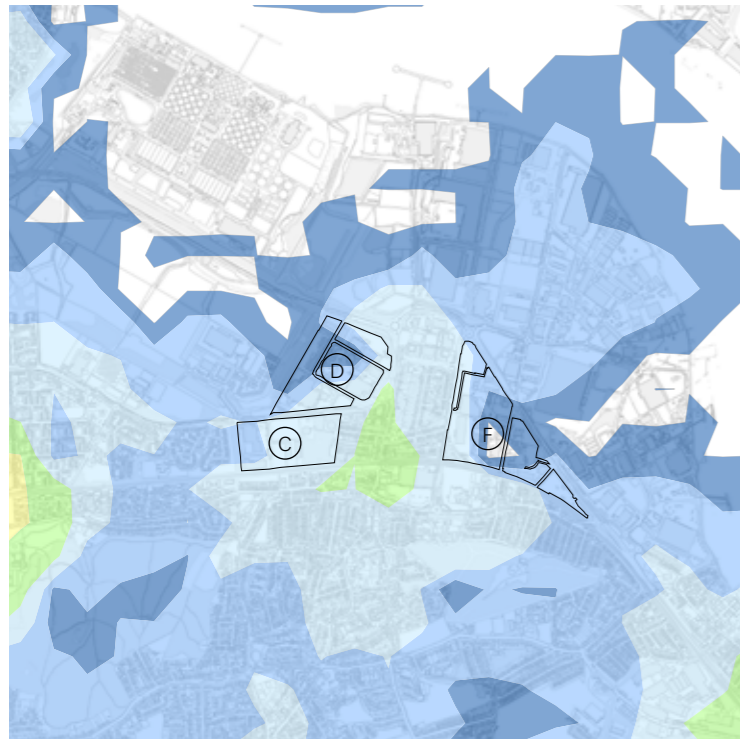
As such, the following pages set out strengths and weaknesses of each sub-area. These conditions are used to define drivers of intensification in each sub-area, and will be used to inform the parameters of new industrial typologies that could deliver spatial intensification of industrial land in the 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)

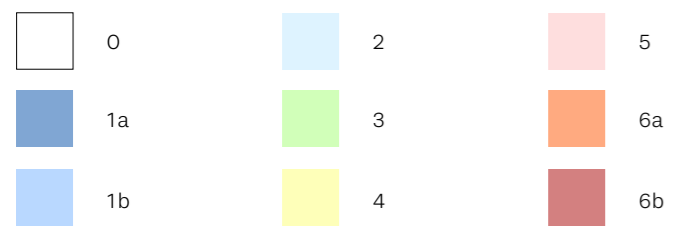


**Industrial Sub-Areas  
Lower Belvedere**

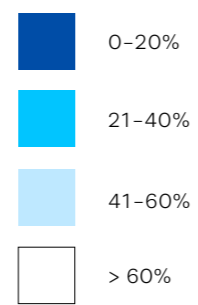
- C Centurian Way
- D Hailey Road Business Park
- F Crabtree Manorway South Employment Area



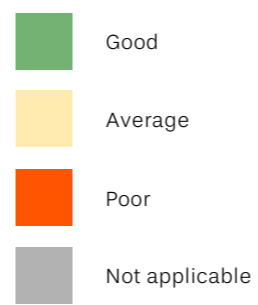
**PTAL (2021 Forecast)**



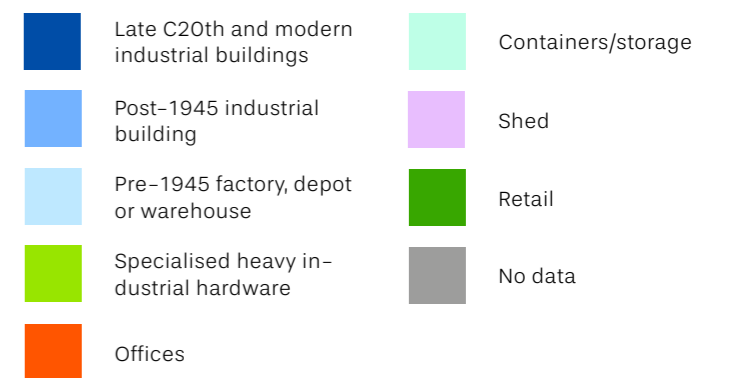
**Plot Coverage**



**Condition of floorspace**



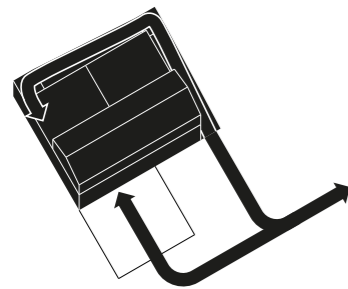
**Building age and type**



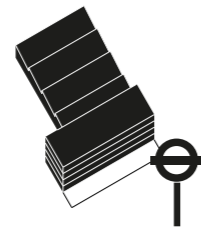
## Industrial Sub-Areas Inner Belvedere

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.

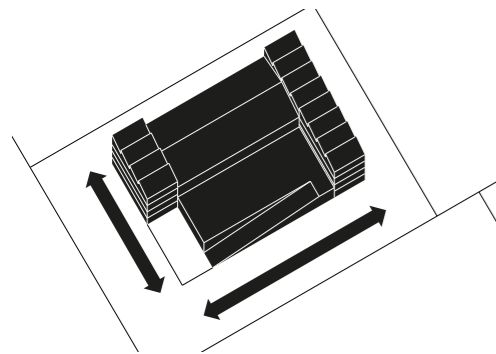
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Inner Belvedere:



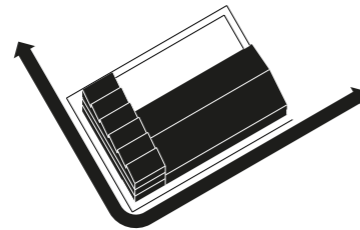
Access



Connectivity



Grain

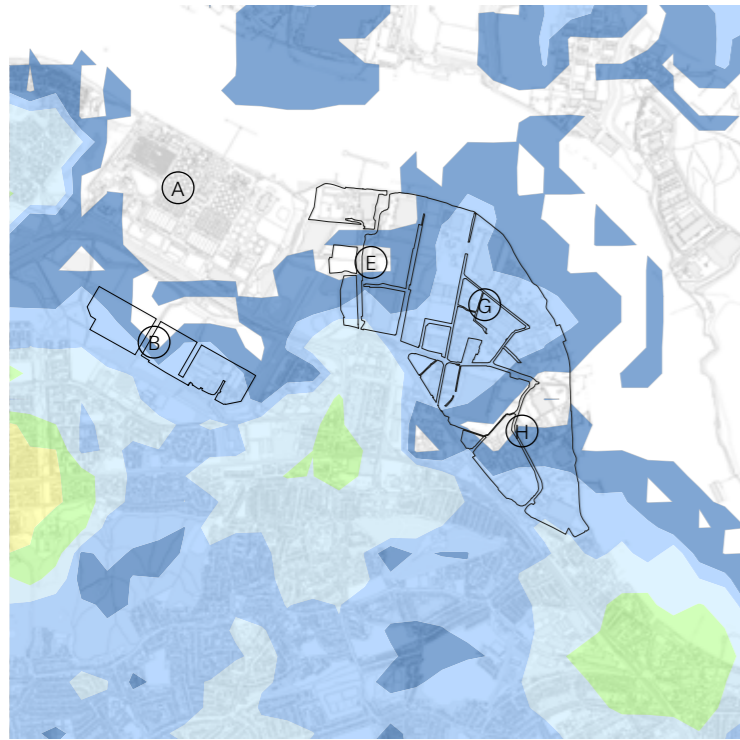


Placemaking

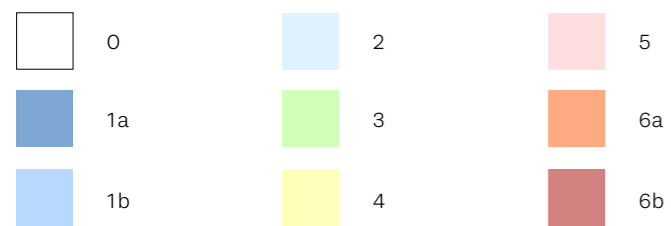
| Sub-Area                                   | Strengths   | Weaknesses  |
|--|---|---|
| Centurian Way                              | <ul style="list-style-type: none"> <li>Modern industrial building stock</li> <li>Close to Belvedere Station</li> <li>Good access to strategic road network</li> </ul>   | <ul style="list-style-type: none"> <li>Site wholly within flood zone 3</li> <li>Not designated SIL</li> </ul>   |
| Hailey Road Business Park                  | <ul style="list-style-type: none"> <li>Modern industrial building stock</li> <li>Generally good condition building stock</li> <li>Good access to strategic road network</li> </ul>  | <ul style="list-style-type: none"> <li>Site wholly within flood zone 3</li> </ul>   |
| Crabtree Manorway<br>South Employment Area | <ul style="list-style-type: none"> <li>Modern industrial building stock with large units</li> <li>Larger building footprints and building heights</li> <li>Cluster of manufacturing uses</li> <li>High concentration of transport and storage</li> <li>Good access to strategic road network</li> <li>Comparatively high rental/land values within the borough</li> </ul> | <ul style="list-style-type: none"> <li>Small units with low building heights</li> <li>Generally poor condition building stock</li> <li>Area contains drainage ditches and dykes</li> <li>Site wholly within flood zone 3</li> </ul> |

**Industrial Sub-Areas  
Outer Belvedere**

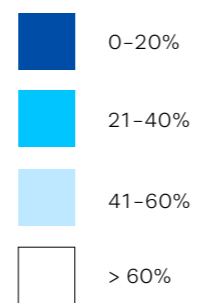
- A Crossness Sewage Works
- B Veridion Park
- E Norman Road Employment Area
- G Crabtree Manorway North Employment Area
- H Church Manorway South Employment Area



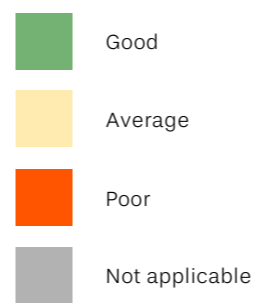
**PTAL (2021 Forecast)**



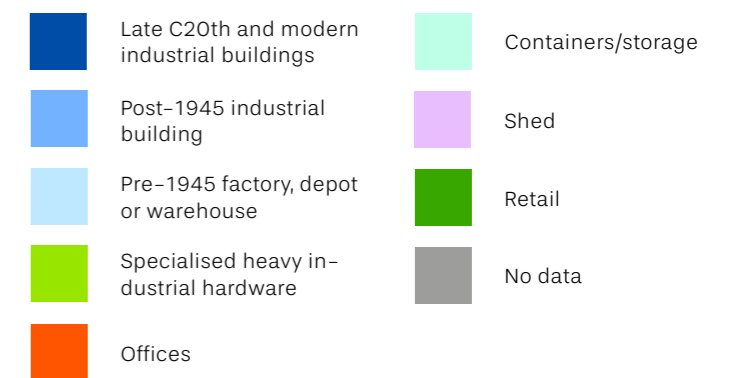
**Plot Coverage**



**Condition of floorspace**



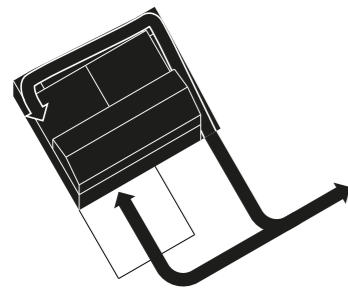
**Building age and type**



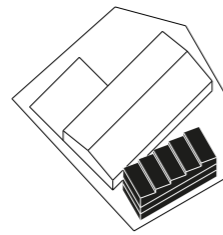
## Industrial Sub-Areas Outer Belvedere

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.

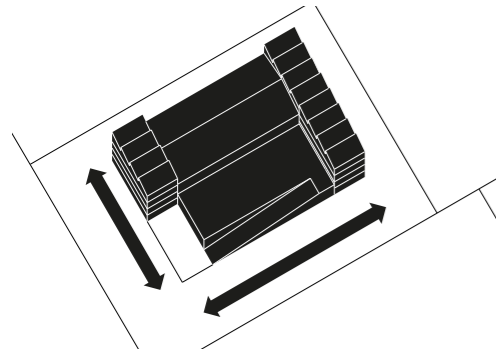
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Belvedere Fringes:



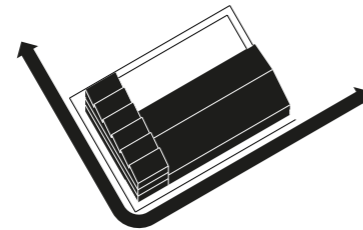
Access



Infill



Grain

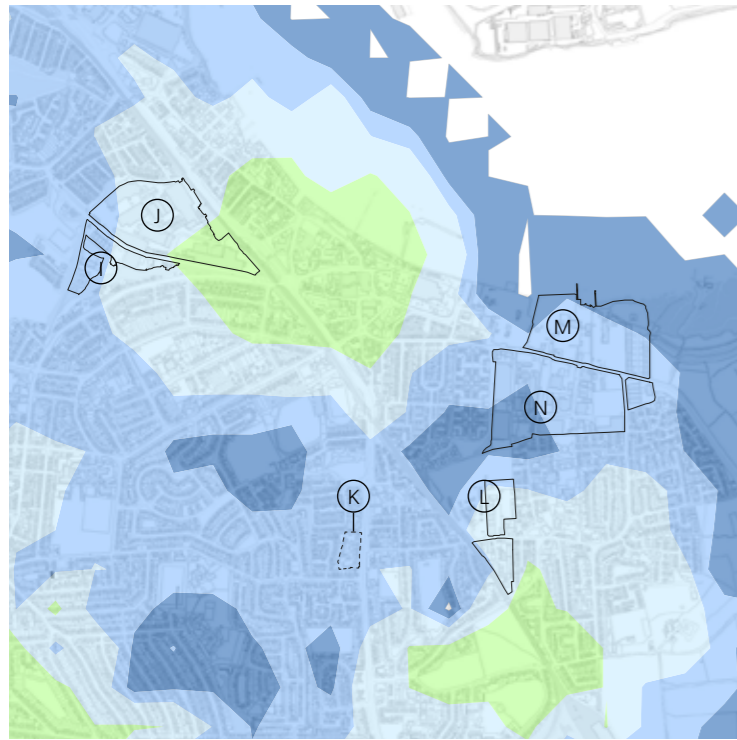


Placemaking

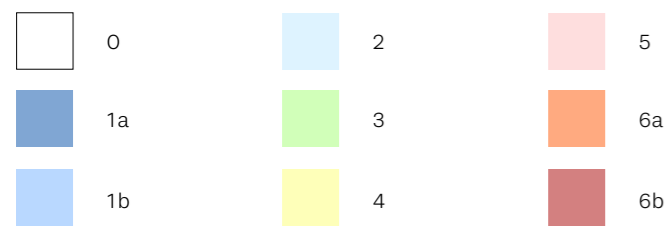
| Sub-Area                                | Strengths   | Weaknesses   |
|---|---|--|
| Crossness Sewage Works                  | <ul style="list-style-type: none"> <li>Single purpose built facility</li> </ul>   | <ul style="list-style-type: none"> <li>Site wholly within flood zone 3</li> <li>Very poor public transport accessibility</li> </ul>  |
| Veridion Park                           | <ul style="list-style-type: none"> <li>Potential development sites</li> <li>Close to Belvedere Station</li> <li>Good access to strategic road network</li> </ul>  | <ul style="list-style-type: none"> <li>Area contains drainage ditches and dykes</li> <li>Site wholly within flood zone 3</li> <li>Poor public transport accessibility</li> </ul>   |
| Norman Road Employment Area             | <ul style="list-style-type: none"> <li>Modern industrial building stock with large units</li> <li>Access to river and wharves</li> <li>Larger building footprints and building heights</li> <li>High concentration of transport and storage</li> <li>Good access to strategic road network</li> <li>Comparatively high rental/land values within the borough</li> </ul>   | <ul style="list-style-type: none"> <li>Area contains drainage ditches and dykes</li> <li>Poor public transport accessibility</li> </ul>  |
| Crabtree Manorway North Employment Area | <ul style="list-style-type: none"> <li>High concentration of transport and storage</li> <li>Large site under GLA ownership</li> <li>Parts of the area have good access to strategic road network</li> <li>Comparatively high rental/land values within the borough</li> </ul>   | <ul style="list-style-type: none"> <li>Clusters of poor condition building stock</li> <li>Area contains drainage ditches and dykes</li> <li>Activities requiring specialised or heavy industrial hardware</li> <li>Site wholly within flood zone 3</li> <li>Poor public transport accessibility</li> </ul> |
| Church Manorway South Employment Area   | <ul style="list-style-type: none"> <li>Modern industrial building stock with large units</li> <li>Larger building footprints and building heights</li> <li>Cluster of manufacturing uses</li> <li>High concentration of transport and storage</li> <li>Good access to strategic road network</li> <li>Comparatively high rental/land values within the borough</li> </ul> | <ul style="list-style-type: none"> <li>Activities requiring specialised or heavy industrial hardware</li> <li>Site wholly within flood zone 3</li> <li>Poor public transport accessibility</li> </ul>  |

## Industrial Sub-Areas Erith

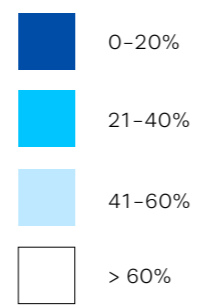
- I Fraser Road
- J Europa Estate
- K Northend Trading Estate
- L Slade Green Industrial Area
- M Manor Road North Industrial Area
- N Manor Road South Industrial Area



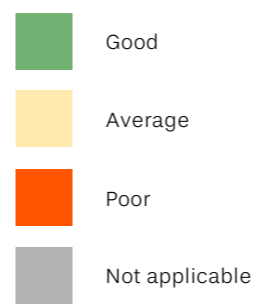
### PTAL (2021 Forecast)



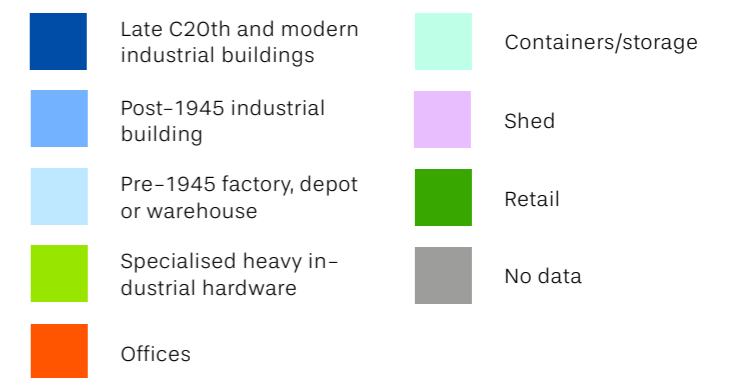
### Plot Coverage



### Condition of floorspace



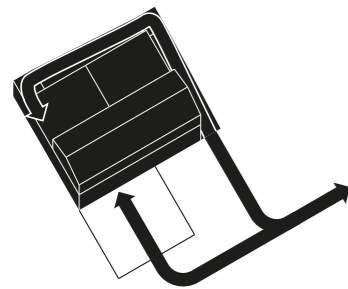
### Building age and type



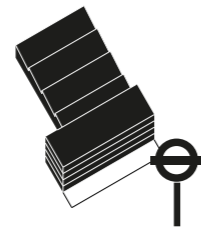
## Industrial Sub-Areas Erith

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.

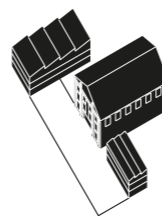
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Erith:



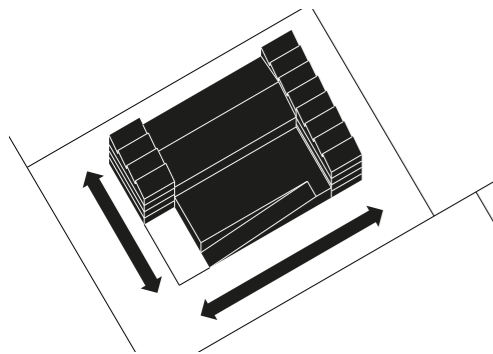
Access



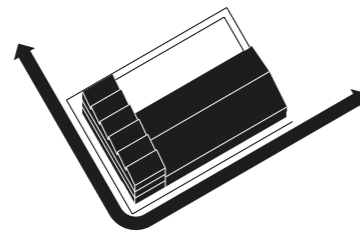
Connectivity



Heritage



Grain



Placemaking

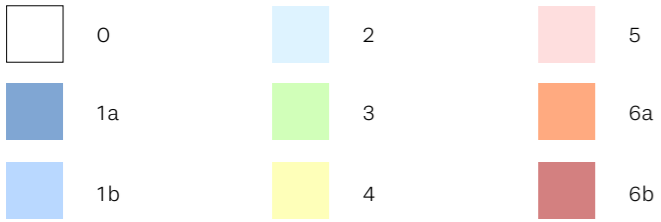
| Sub-Area                         | Strengths   | Weaknesses   |
|----------------------------------|---|--|
| Fraser Road                      | <ul style="list-style-type: none"> <li>Multistorey industrial building</li> <li>Close to Belvedere Station</li> <li>Good access to strategic road network</li> </ul>  | <ul style="list-style-type: none"> <li>Not designated SIL</li> </ul>   |
| Europa Estate                    | <ul style="list-style-type: none"> <li>Large industrial units</li> <li>Existing industrial buildings with heritage value</li> <li>Close to Erith Station</li> <li>Presence of art, culture and leisure uses</li> <li>Majority of site under three main owners</li> <li>Good access to strategic road network</li> </ul> | <ul style="list-style-type: none"> <li>Vacant building</li> <li>Not designated SIL</li> <li>Site partially within flood zone 3</li> </ul>  |
| Northend Trading Estate          | <ul style="list-style-type: none"> <li>Access to strategic road network</li> </ul>  | <ul style="list-style-type: none"> <li>Site access limited to north bound vehicles</li> <li>Visibility from the road</li> </ul>  |
| Slade Green Industrial Area      | <ul style="list-style-type: none"> <li>Area south of Slade Green Road close to Slade Green station</li> <li>Locally listed church adjacent to the site</li> </ul>   | <ul style="list-style-type: none"> <li>Partially cleared for residential development.</li> <li>High proportion of non-SIL uses</li> <li>Poor access to strategic road network relative to other industrial areas</li> <li>Vehicular movements associated with industrial activities causing environmental issues in surrounding residential areas</li> </ul> |
| Manor Road North Industrial Area | <ul style="list-style-type: none"> <li>Historically attracted heavy industrial activities</li> <li>National Construction College site under LBB ownership</li> </ul>  | <ul style="list-style-type: none"> <li>Poor access to strategic road network</li> <li>Site partially within flood zone 3</li> </ul>  |
| Manor Road South Industrial Area | <ul style="list-style-type: none"> <li>Historically attracted heavy industrial activities</li> </ul>  | <ul style="list-style-type: none"> <li>Vacant buildings and partially vacant sites</li> <li>Poor access to strategic road network</li> </ul>   |

# Industrial Sub-Areas Crayford Ness

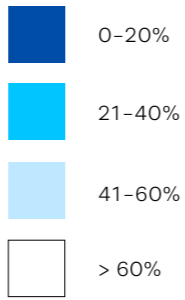
O Crayford Ness Employment Area



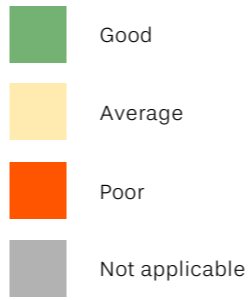
**PTAL (2021 Forecast)**



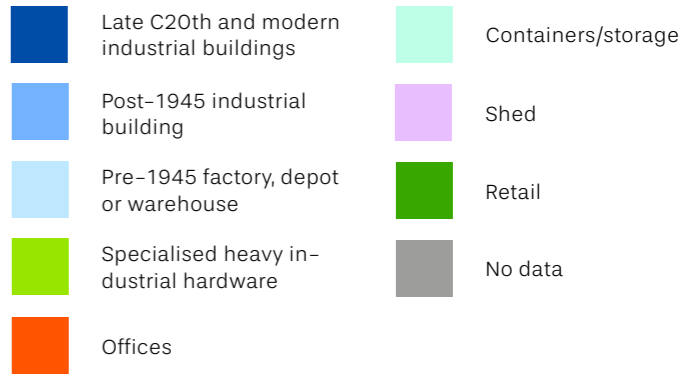
**Plot Coverage**



**Condition of floorspace**



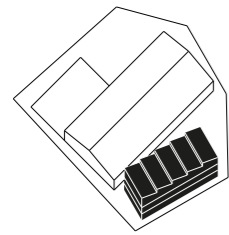
**Building age and type**



**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:

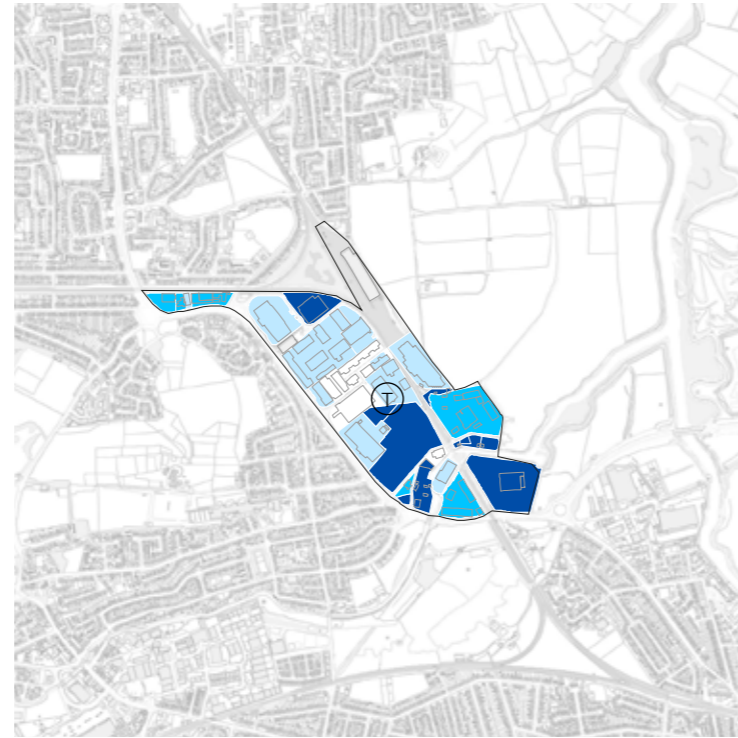
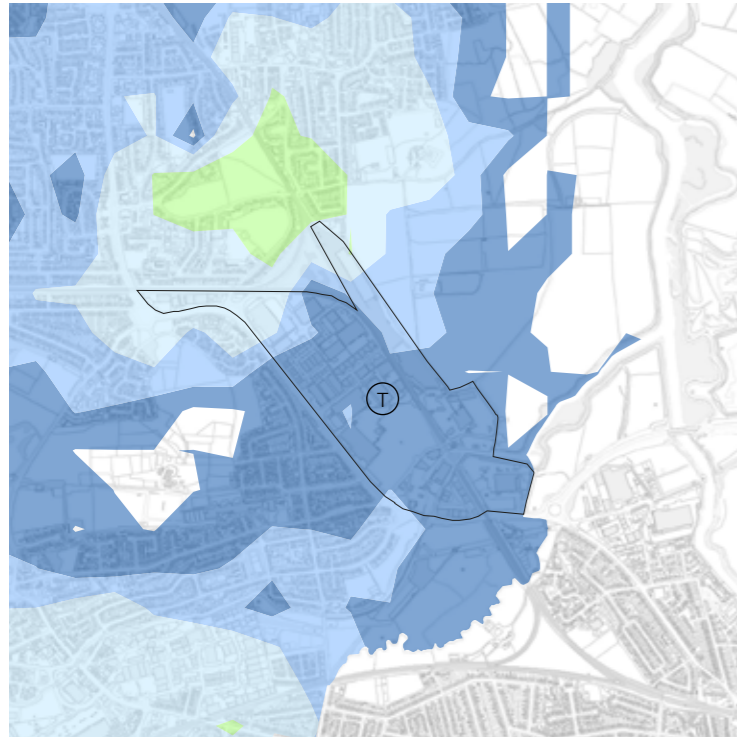


**Infill**

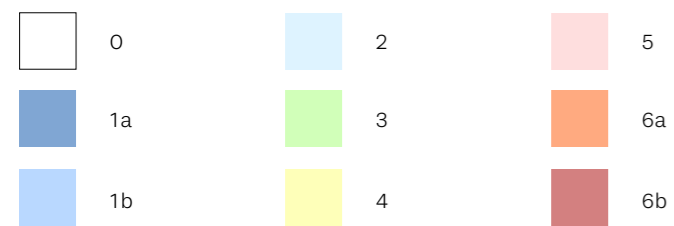
| Sub-Area                      | Strengths  | Weaknesses   |
|-------------------------------|--|--|
| Crayford Ness Employment Area | <ul style="list-style-type: none"> <li>High concentration of construction and vehicle repair uses</li> </ul> | <ul style="list-style-type: none"> <li>Poor condition building stock on small plots with low plot ratio</li> <li>High number of sheds with low building height</li> <li>Poor access to strategic road network</li> <li>Partially vacant sites</li> <li>Fragmented land ownership</li> <li>Site wholly within flood zone 3</li> </ul> |

## Industrial Sub-Areas Thames Road

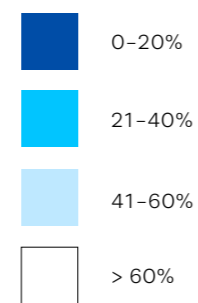
- T Thames Road Industrial Area
- U Bourne Industrial Park
- V Crayford Industrial Area
- W Maxim Road



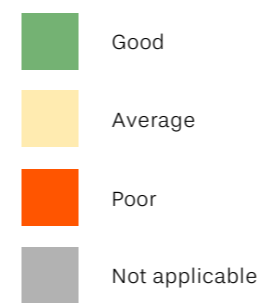
### PTAL (2021 Forecast)



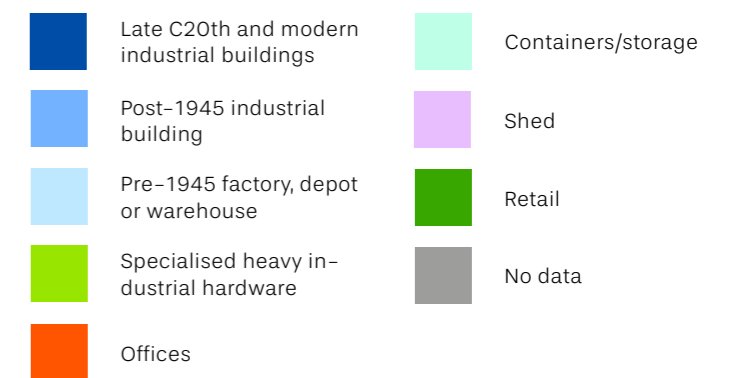
### Plot Coverage



### Condition of floorspace



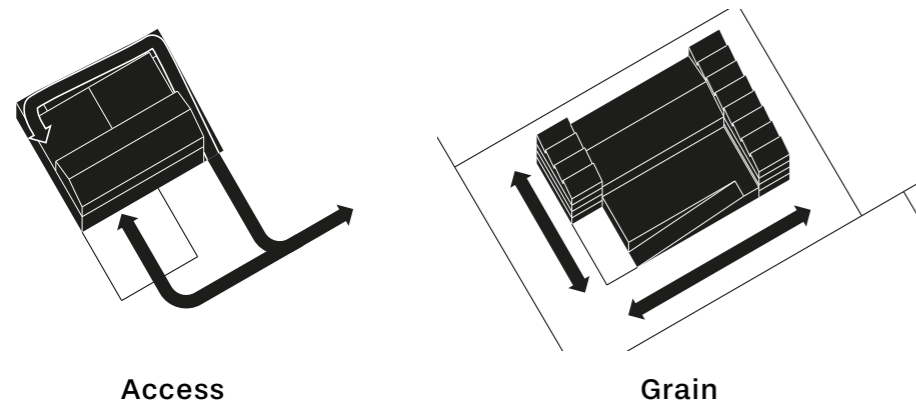
### Building age and type



## 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.

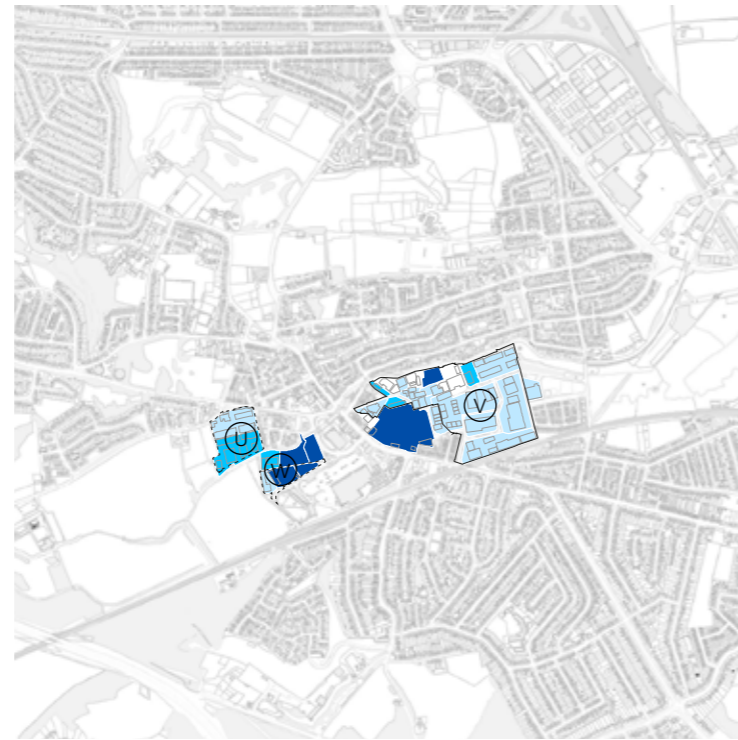
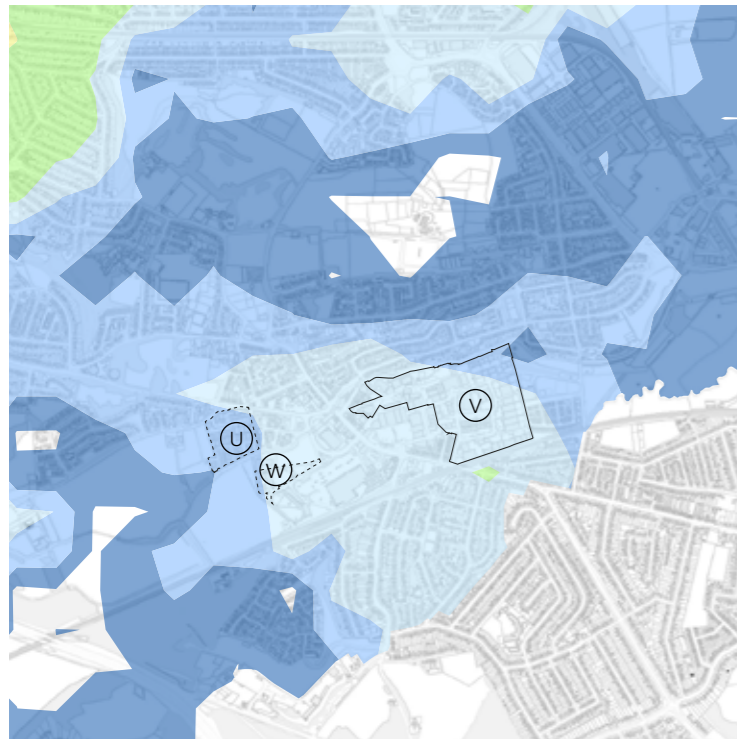
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Thames Road:



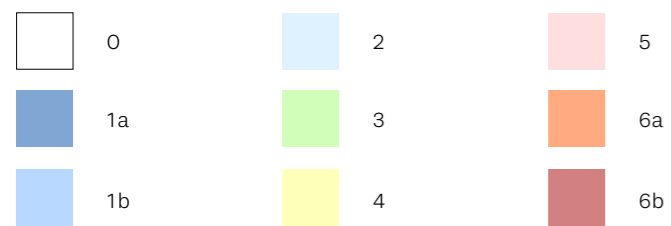
| Sub-Area                    | Strengths  | Weaknesses  |
|-----------------------------|--|---|
| Thames Road Industrial Area | <ul style="list-style-type: none"> <li>• High plot ratio relative to other sites in OAPF Area</li> <li>• Modern industrial stock with large units</li> <li>• Cluster of manufacturing uses</li> <li>• High concentration of transport and storage</li> <li>• Waste Centre site under GLA ownership</li> <li>• Good access to strategic road network</li> </ul> | <ul style="list-style-type: none"> <li>• Cluster of poor quality buildings</li> <li>• Some vacant buildings and partially vacant sites</li> <li>• Site partially within flood zone 3</li> </ul> |

## Industrial Sub-Areas Crayford

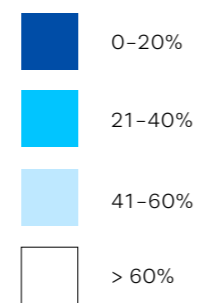
- T Thames Road Industrial Area
- U Bourne Industrial Park
- V Crayford Industrial Area
- W Maxim Road



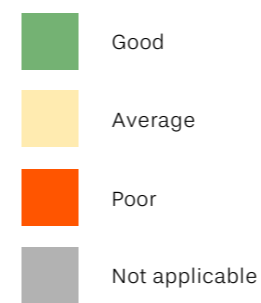
### PTAL (2021 Forecast)



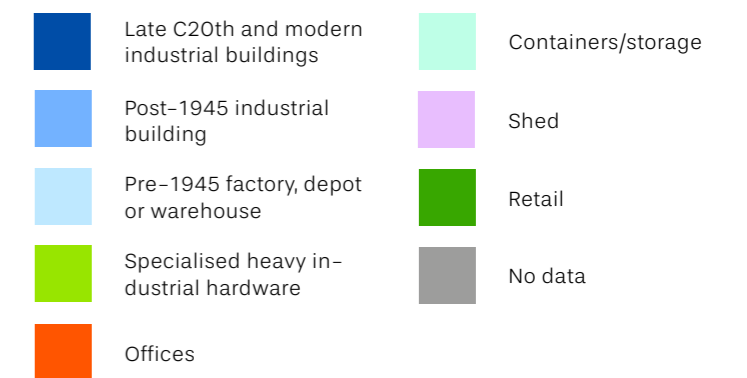
### Plot Coverage



### Condition of floorspace



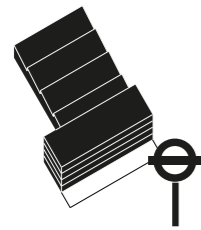
### Building age and type



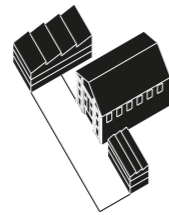
## Industrial Sub-Areas Crayford

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.

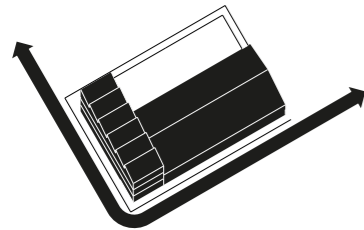
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Crayford:



Connectivity



Heritage

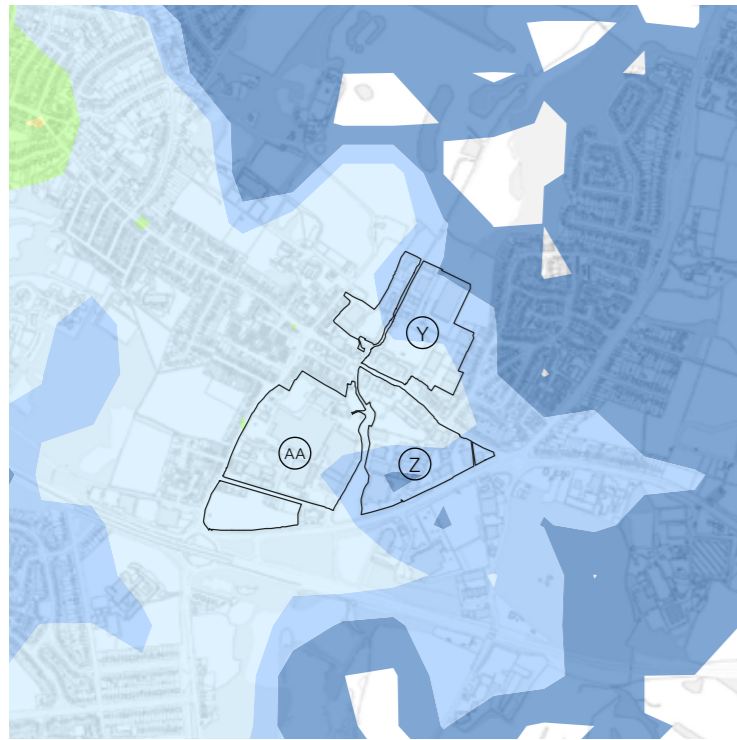


Placemaking

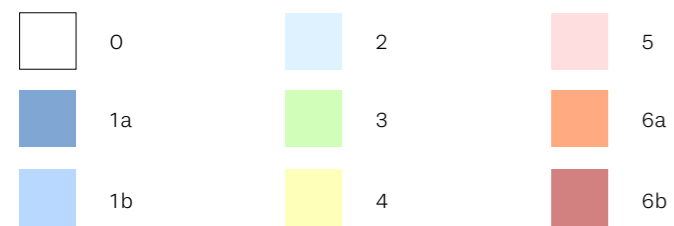
| Sub-Area                    | Strengths  | Weaknesses  |
|-----------------------------|--|---|
| Thames Road Industrial Area | <ul style="list-style-type: none"> <li>High plot ratio relative to other sites in OAPF Area</li> <li>Modern industrial stock with large units</li> <li>Cluster of manufacturing uses</li> <li>High concentration of transport and storage</li> <li>Waste Centre site under GLA ownership</li> <li>Good access to strategic road network</li> </ul> | <ul style="list-style-type: none"> <li>Cluster of poor quality buildings</li> <li>Some vacant buildings and partially vacant sites</li> <li>Site partially within flood zone 3</li> </ul>   |
| Bourne Road Employment Area | <ul style="list-style-type: none"> <li>Modern industrial building stock</li> <li>Cluster of workshops</li> <li>Large development site</li> </ul>   | <ul style="list-style-type: none"> <li>Poor access to strategic road network</li> </ul>   |
| Crayford Industrial Area    | <ul style="list-style-type: none"> <li>Some mid-C20th buildings</li> <li>Cluster of workshop</li> <li>Comparatively high rental/land values within the borough</li> </ul>  | <ul style="list-style-type: none"> <li>Cluster of poor condition building stock</li> <li>No large industrial units</li> <li>Poor access to strategic road network</li> <li>Presence of restaurants and retail within SIL</li> <li>Vacant sites</li> <li>Site partially within flood zone 3</li> </ul> |
| Maxim Road                  | <ul style="list-style-type: none"> <li>Modern industrial building stock</li> </ul>   | <ul style="list-style-type: none"> <li>Poor access to strategic road network</li> <li>Vacant sites</li> <li>Site partially within flood zone 3</li> </ul>   |

## Industrial Sub-Areas Foots Cray

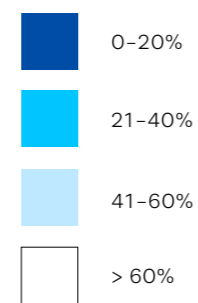
- Y    Foots Cray Business Area (A)
- Z    Foots Cray Business Area (B)
- AA   Foots Cray Business Area (C)



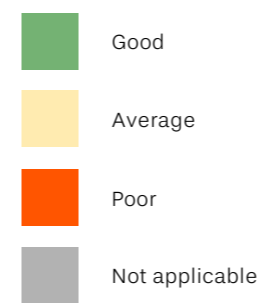
### PTAL (2021 Forecast)



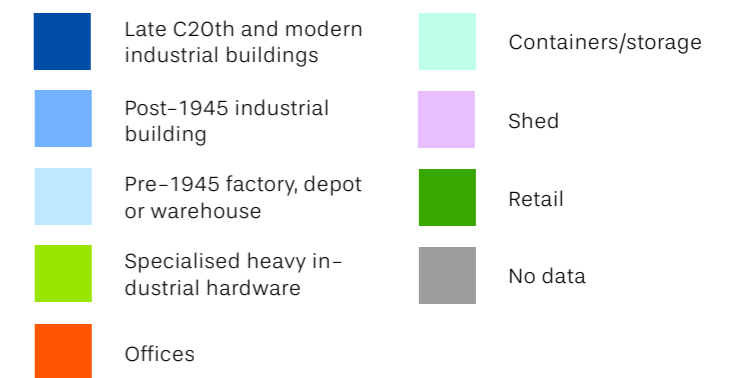
### Plot Coverage



### Condition of floorspace



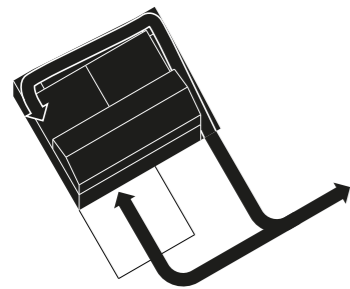
### Building age and type



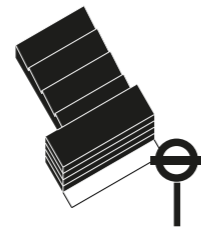
## Industrial Sub-Areas Foots Cray

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.

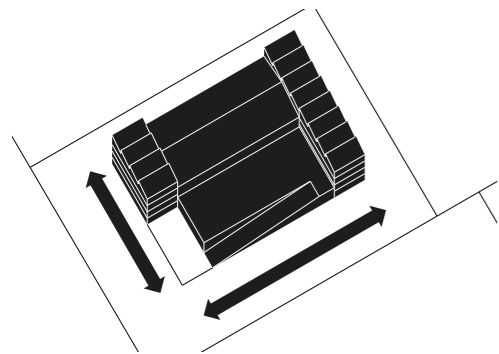
Given these existing strengths and weaknesses, the following drivers are relevant to deliver intensification in Foots Cray:



Access



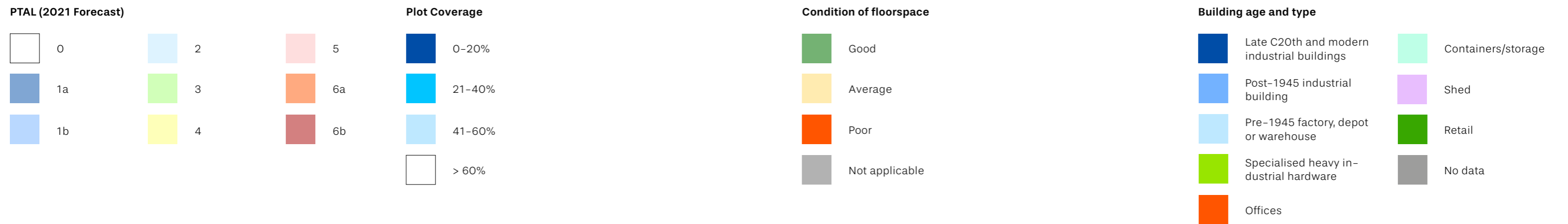
Connectivity



Grain

| Sub-Area                     | Strengths  | Weaknesses   |
|------------------------------|--|--|
| Foots Cray Business Area (A) | <ul style="list-style-type: none"> <li>• Good access to strategic road network</li> <li>• Bus services</li> <li>• Modern office buildings create a good appearance to the wider area.</li> <li>• Existing landscaping creates a positive environment.</li> </ul> | <ul style="list-style-type: none"> <li>• Partially within flood zone 3.</li> </ul>   |
| Foots Cray Business Area (B) | <ul style="list-style-type: none"> <li>• Good access to strategic road network</li> <li>• Bus services</li> <li>• Visible presence from the main roads.</li> </ul>   | <ul style="list-style-type: none"> <li>• Partially within flood zone 3.</li> </ul>   |
| Foots Cray Business Area (C) | <ul style="list-style-type: none"> <li>• Good access to strategic road network</li> <li>• Bus services</li> <li>• Large site under single ownership with modern facilities.</li> </ul>   | <ul style="list-style-type: none"> <li>• Partially within flood zone 3.</li> <li>• Built fabric generally in a poor condition.</li> <li>• Poor quality environment contributes to a lower market profile.</li> </ul> |

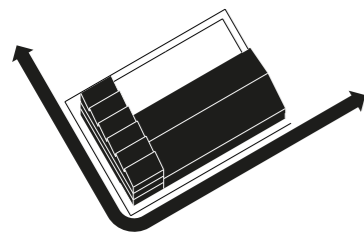
Industrial Sub-Areas  
Other Small LSIS Sites



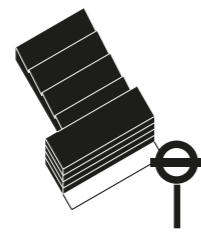
**Industrial Sub-Areas  
Other Small LSIS Sites**

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 2017 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              | <ul style="list-style-type: none"> <li>• Good public transport accessibility.</li> </ul> | <ul style="list-style-type: none"> <li>• Constrained due to residential location.</li> </ul>  |
| Bexleyheath          | <ul style="list-style-type: none"> <li>• Good public transport accessibility.</li> </ul> | <ul style="list-style-type: none"> <li>• Site access via narrow roads.</li> <li>• Constrained due to residential location.</li> </ul> |
| Northumberland Heath | <ul style="list-style-type: none"> <li>• -</li> </ul>                                    | <ul style="list-style-type: none"> <li>• Residential context create access problems for the site, particularly for HGVs.</li> </ul>   |

**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:


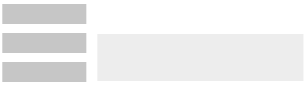
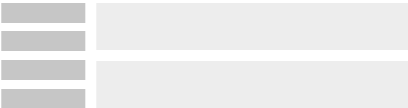


1  
These typologies are unsuitable in areas of low PTAL.

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

Case Study Sites



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

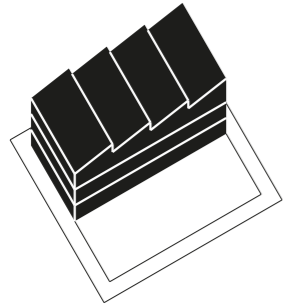
PTAL - 1b



Northend Trading Estate  
Vacant 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<br>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

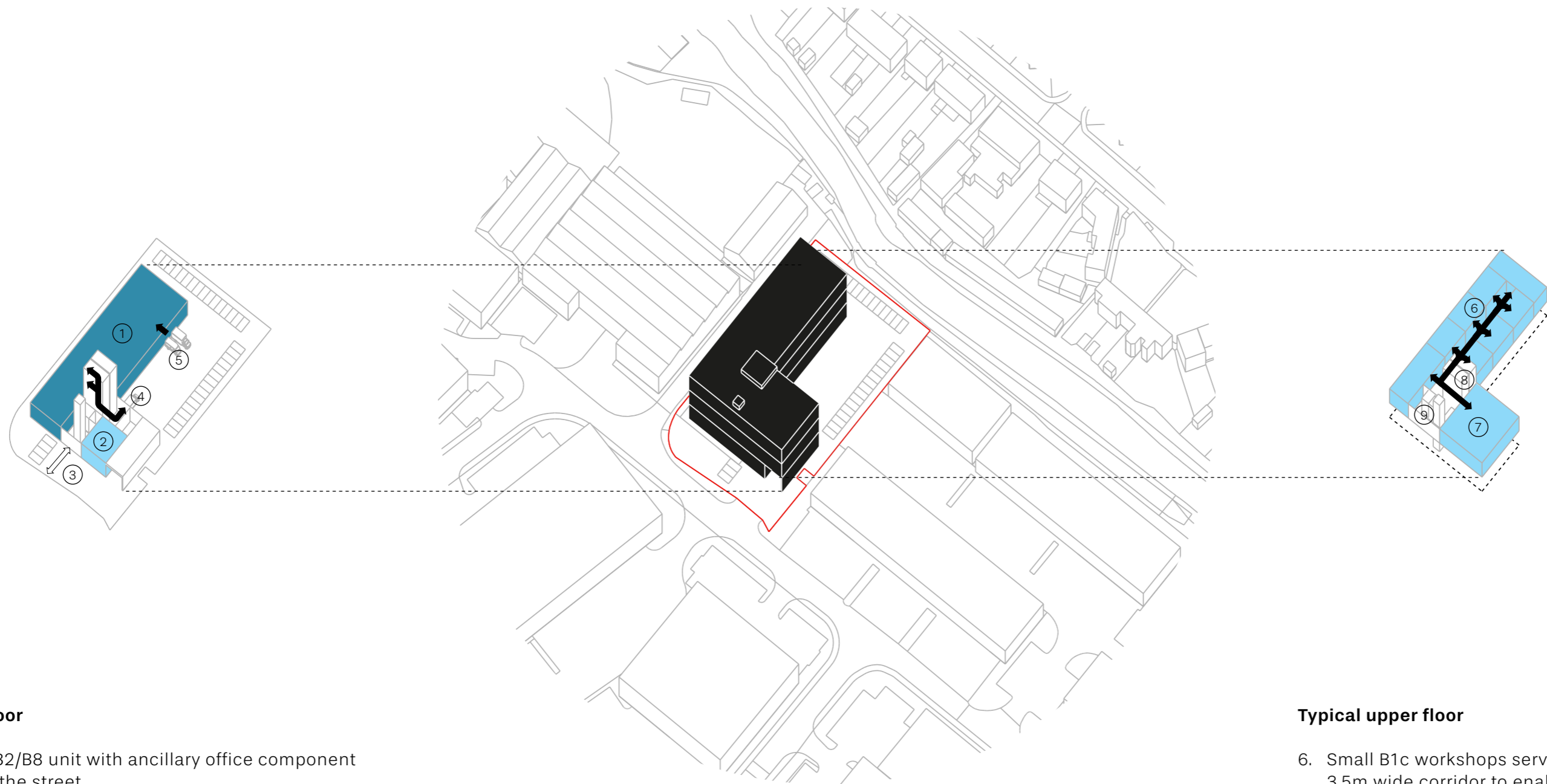
- Light industrial building leased to 50 SMEs
- Goods lifts serve units on upper storeys
- Consistent frontage along main street creates good street environment within a business park



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 B1(c) 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**

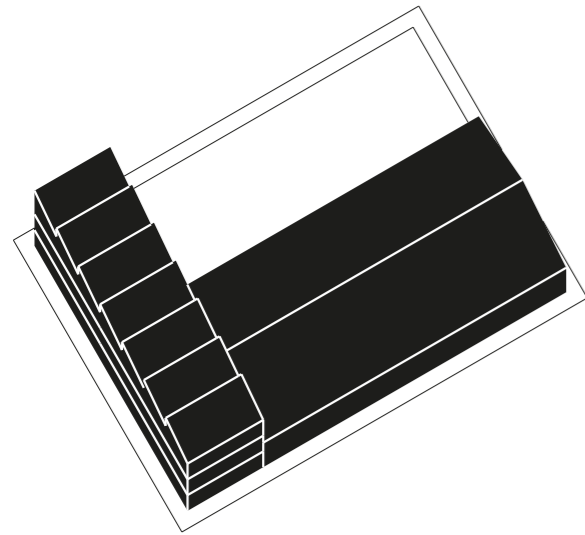
11,060 m<sup>2</sup> employment floorspace per ha

|                       |                      |                |                             |
|-----------------------|----------------------|----------------|-----------------------------|
| B1(c) NIA             | 2,340 m <sup>2</sup> | B1 (c) density | 5,550 m <sup>2</sup> per ha |
| B2/B8 NIA             | 1,020 m <sup>2</sup> | B2/B8 density  | 2,430 m <sup>2</sup> per ha |
| Ext. Operational Area | 1,300 m <sup>2</sup> |                |                             |

**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**



**Dimensions**

|        |  |
|--------|--|
| Area   | Typical studio/workshop floor plate dimensions – 20 x 40m<br>Typical medium industrial floor plate dimensions – 40 x 80m |
| Height | Ceiling height studio/workshop –4–8m<br>Ceiling height medium industrial –6–8m   |

**Access and Servicing**

|                           |  |
|---------------------------|--|
| Yard space                | LGV Access – 16m deep yard for ground floor units/goods lift<br>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



Atos, Amsterdam

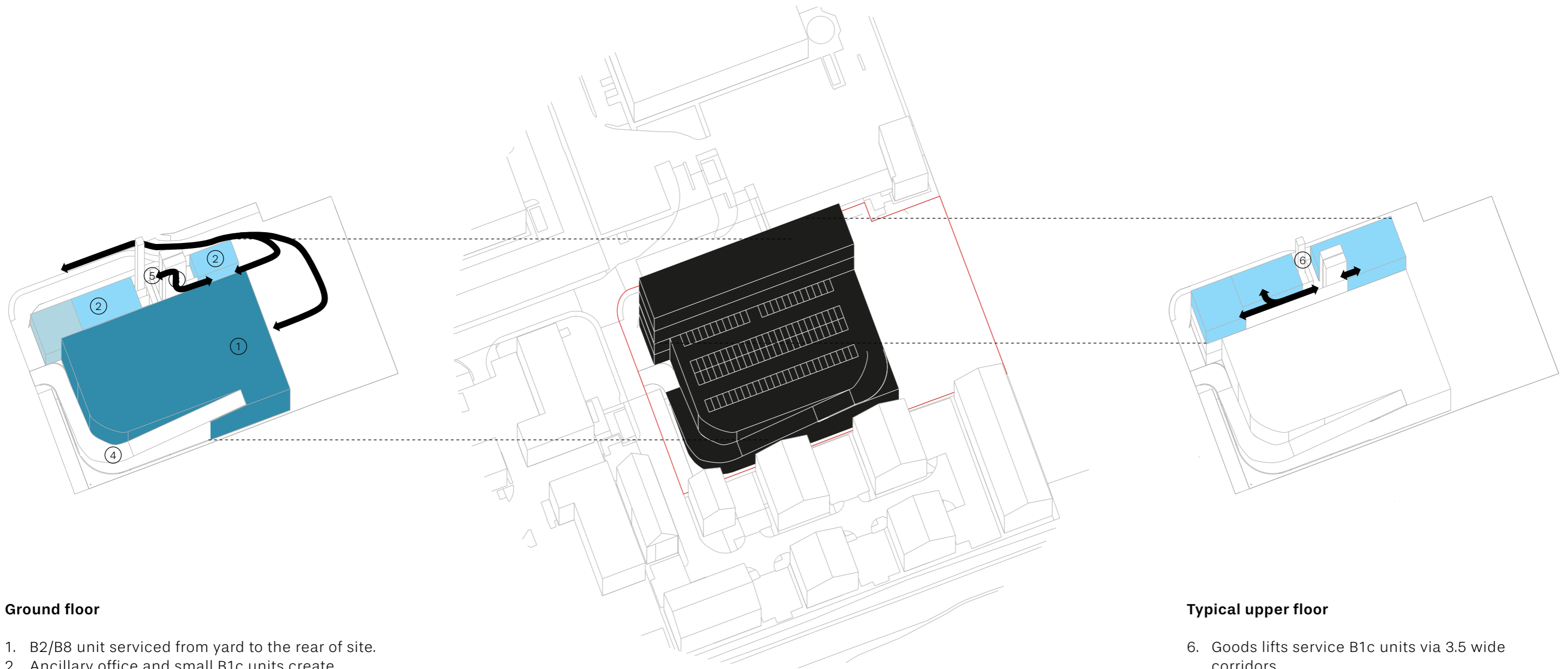
- Adjacent linked office and light industrial buildings.
- Office component creates good quality street, industrial space buffers against the railway to the north.
- Servicing to industrial space from yard.



HereEast, Hackney

- 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.

**Typical upper floor**

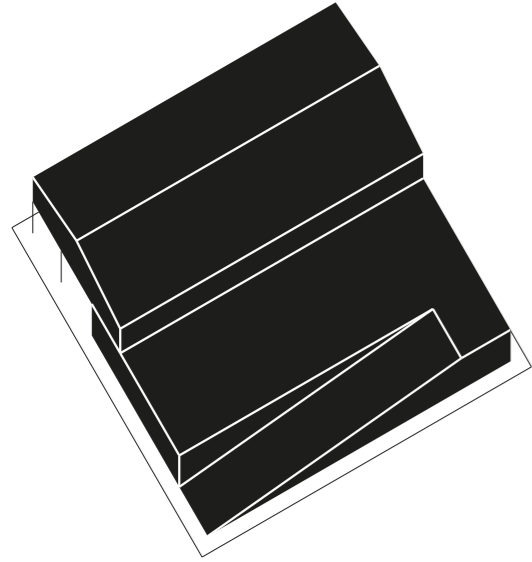
6. Goods lifts service B1c units via 3.5 wide corridors.

**Typology Density**

7,270 m<sup>2</sup> employment floorspace per ha

|                       |                      |                |                              |
|-----------------------|----------------------|----------------|------------------------------|
| B1(a) NIA             | 510 m <sup>2</sup>   | B1 (a) density | 510 m <sup>2</sup> per ha    |
| B1(c) NIA             | 2,340 m <sup>2</sup> | B1 (c) density | 2,340 m <sup>2</sup> per ha  |
| B2/B8 NIA             | 3,080 m <sup>2</sup> | B2/B8 density  | 3,080- m <sup>2</sup> per ha |
| Ext. Operational Area | 3,060 m <sup>2</sup> |                |                              |

**Typologies**  
**Stacked Warehouse**



**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<br>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.



Theydon Road, Hackney

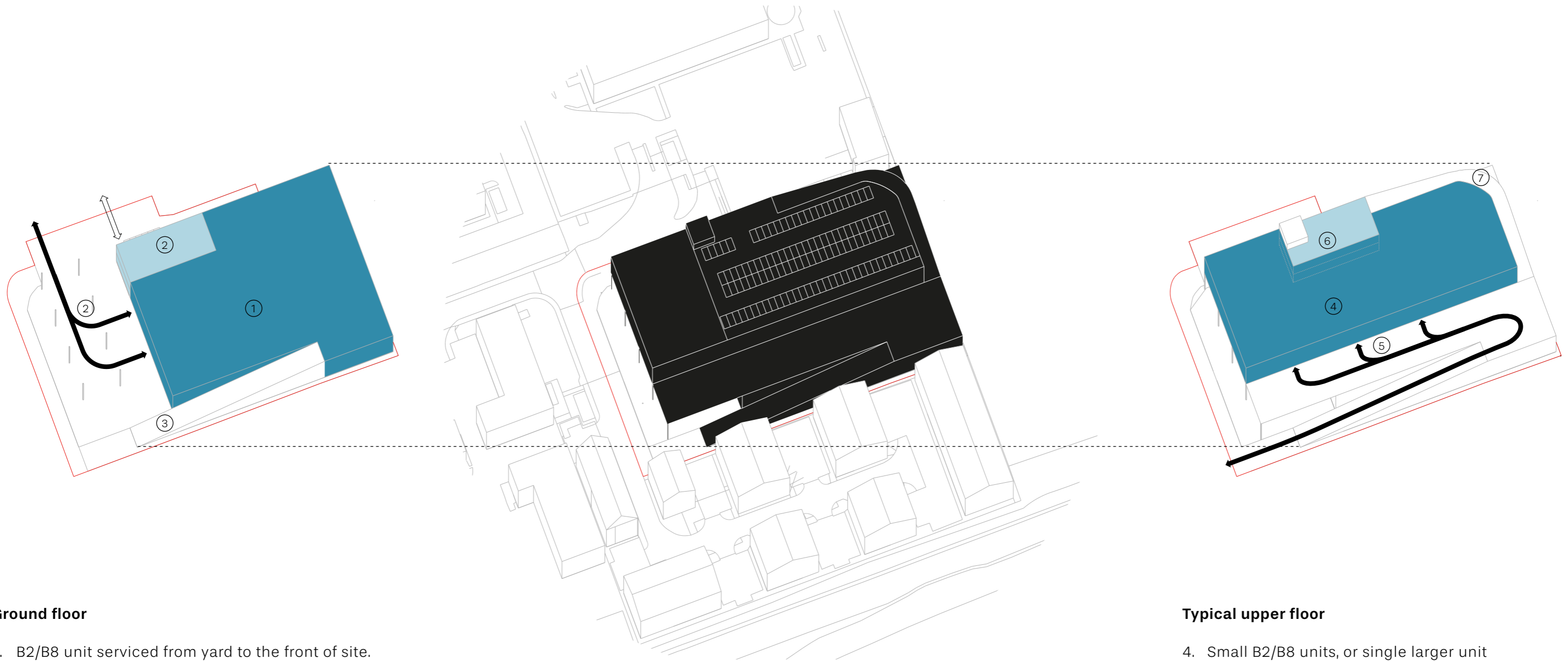
- Multi-storey industrial units.
- Utilises topography to give LGV access to upper storey.



Peruvian Wharf, Newham

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

**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.

**Typical upper floor**

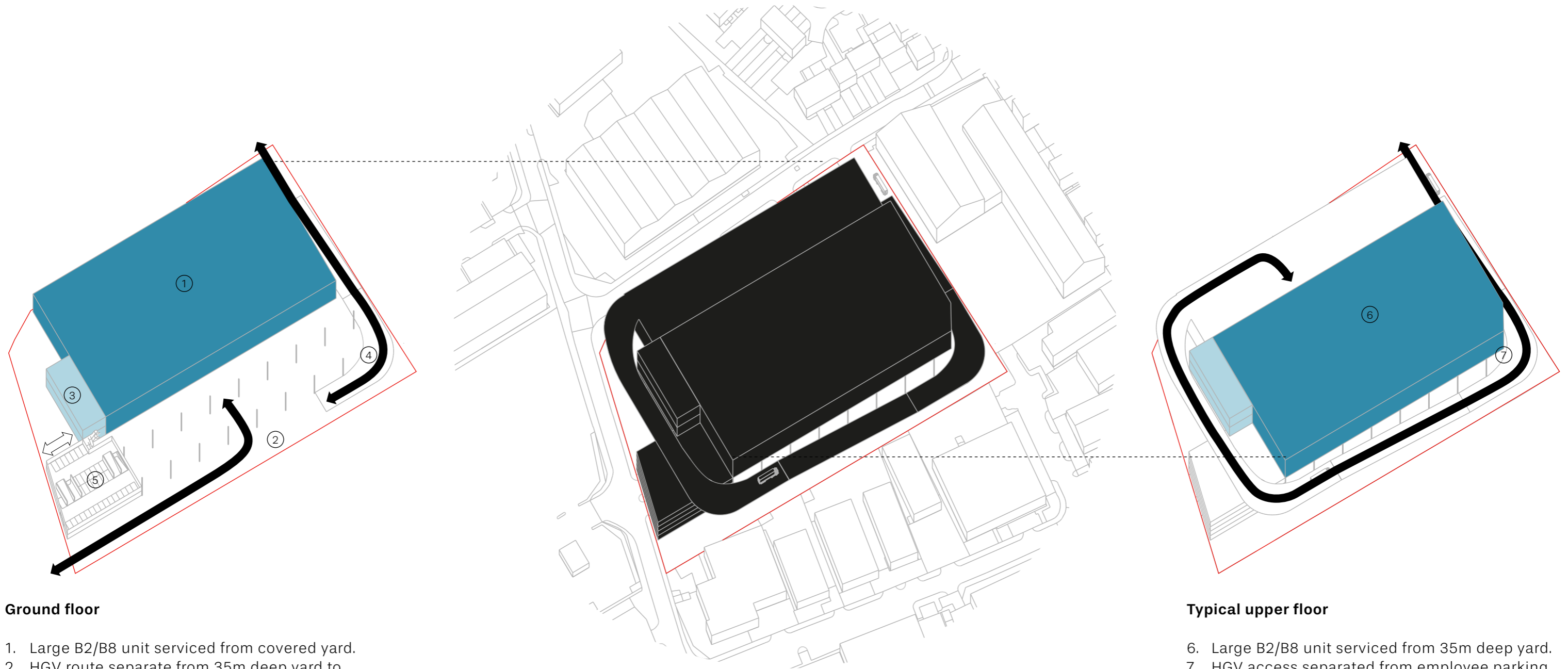
4. Small B2/B8 units, or single larger unit
5. Service access for small rigid goods vehicles from yard.
6. Ancillary office with entrance directly onto street.
7. Ramp access to employee parking at second floor.

**Typology Density**

10,960 m<sup>2</sup> employment floorspace per ha

|                       |                      |                |                             |
|-----------------------|----------------------|----------------|-----------------------------|
| B1(a) NIA             | 1,110 m <sup>2</sup> | B1 (a) density | 1,113 m <sup>2</sup> per ha |
| B1(c) NIA             | 0 m <sup>2</sup>     | B1 (c) density | 0 m <sup>2</sup> per ha     |
| B2/B8 NIA             | 8,718 m <sup>2</sup> | B2/B8 density  | 8,739 m <sup>2</sup> per ha |
| Ext. Operational Area | 3,691 m <sup>2</sup> |                |                             |

**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.

**Typical upper floor**

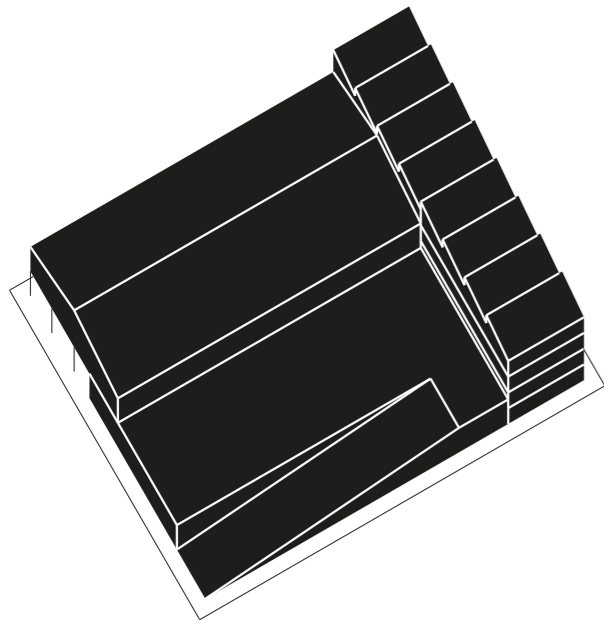
6. Large B2/B8 unit serviced from 35m deep yard.
7. HGV access separated from employee parking access to minimise congestion.

**Typology Density**

9,180 m<sup>2</sup> employment floorspace per ha

|                       |                       |                |                             |
|-----------------------|-----------------------|----------------|-----------------------------|
| B1(a) NIA             | 1,476 m <sup>2</sup>  | B1 (a) density | 790 m <sup>2</sup> per ha   |
| B2/B8 NIA             | 15,366 m <sup>2</sup> | B2/B8 density  | 8,220 m <sup>2</sup> per ha |
| Ext. Operational Area | 7,900 m <sup>2</sup>  |                |                             |

**Typologies**  
**Adjacent Workshop and Stacked Warehouse**



**Dimensions**

|        |  |
|--------|--|
| Area   | Typical studio/workshop floor plate dimensions – 20 x 40m<br>Typical medium industrial floor plate dimensions – 40 x 80m |
| Height | Ceiling height studio/workshop –4–8m<br>Ceiling height medium industrial –6–8m   |

**Access and Servicing**

|                           |   |
|---------------------------|---|
| Yard space                | LGV Access – 16m deep yard for ground floor units/goods lift<br>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.<br>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.

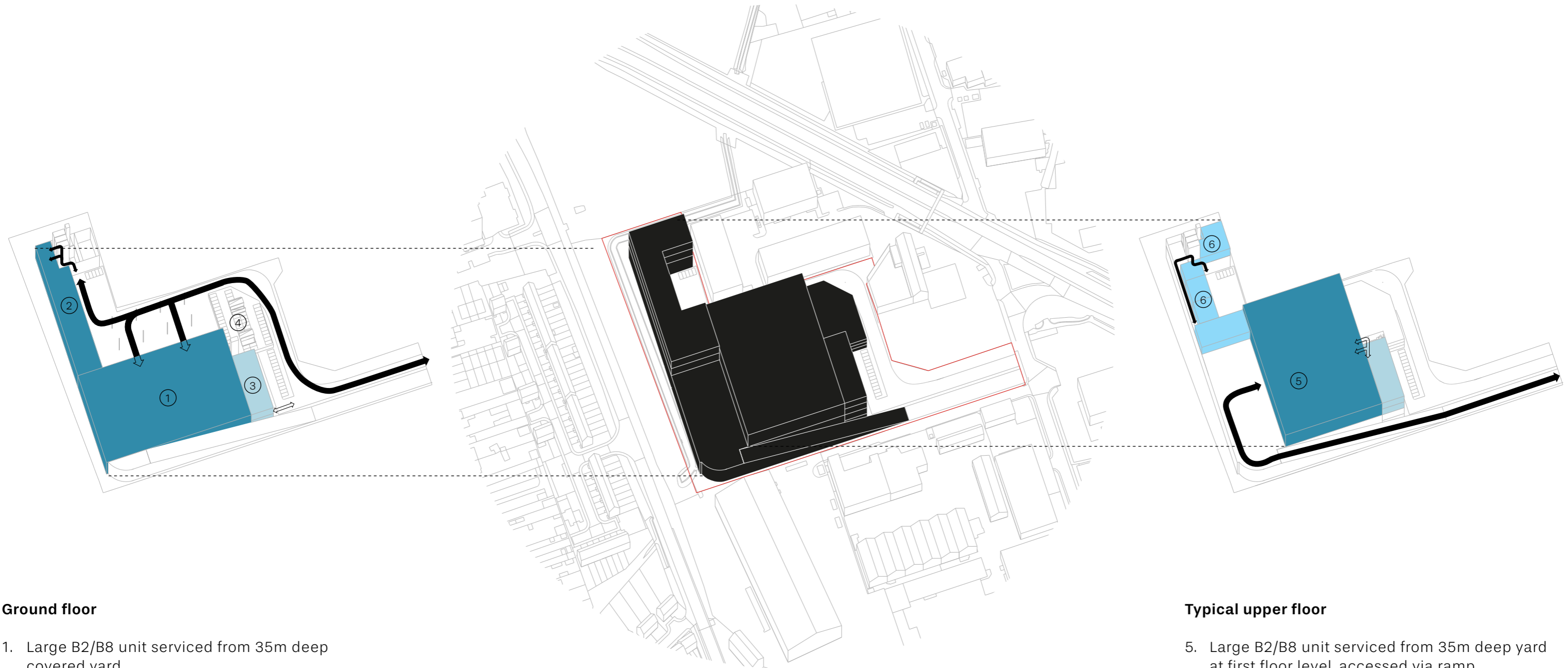
Kaap Noord, Amsterdam

- Mix of workspace typologies accommodated 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.

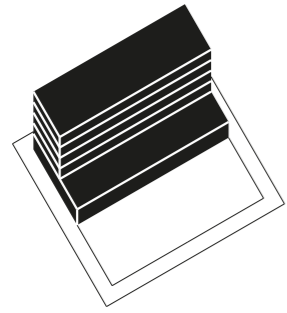
**Typical upper floor**

5. Large B2/B8 unit serviced from 35m deep yard at first floor level, accessed via ramp.
6. Small B1c units serviced by 2no. goods lifts.

**Typology Density**  
 8,800 m<sup>2</sup> employment floorspace per ha

|                       |                       |                |                             |
|-----------------------|-----------------------|----------------|-----------------------------|
| B1(a) NIA             | 2,648 m <sup>2</sup>  | B1 (a) density | 1,050 m <sup>2</sup> per ha |
| B1(c) NIA             | 2,438 m <sup>2</sup>  | B1 (c) density | 970 m <sup>2</sup> per ha   |
| B2/B8 NIA             | 14,839 m <sup>2</sup> | B2/B8 density  | 5,890 m <sup>2</sup> per ha |
| Ext. Operational Area | 7,140 m <sup>2</sup>  |                |                             |

**Typologies**  
**Stacked Workshop and Residential**



**Dimensions**

|        |   |
|--------|---|
| Area   | Typical employment floorplate dimensions – 20 x 40m<br>Typical residential floorplate dimensions – 16 x 24m |
| Height | Ceiling height – 4–8m   |

**Access and Servicing**

|                              |   |
|------------------------------|---|
| Yard space                   | LGV Access – 16m deep yard<br>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.<br>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.

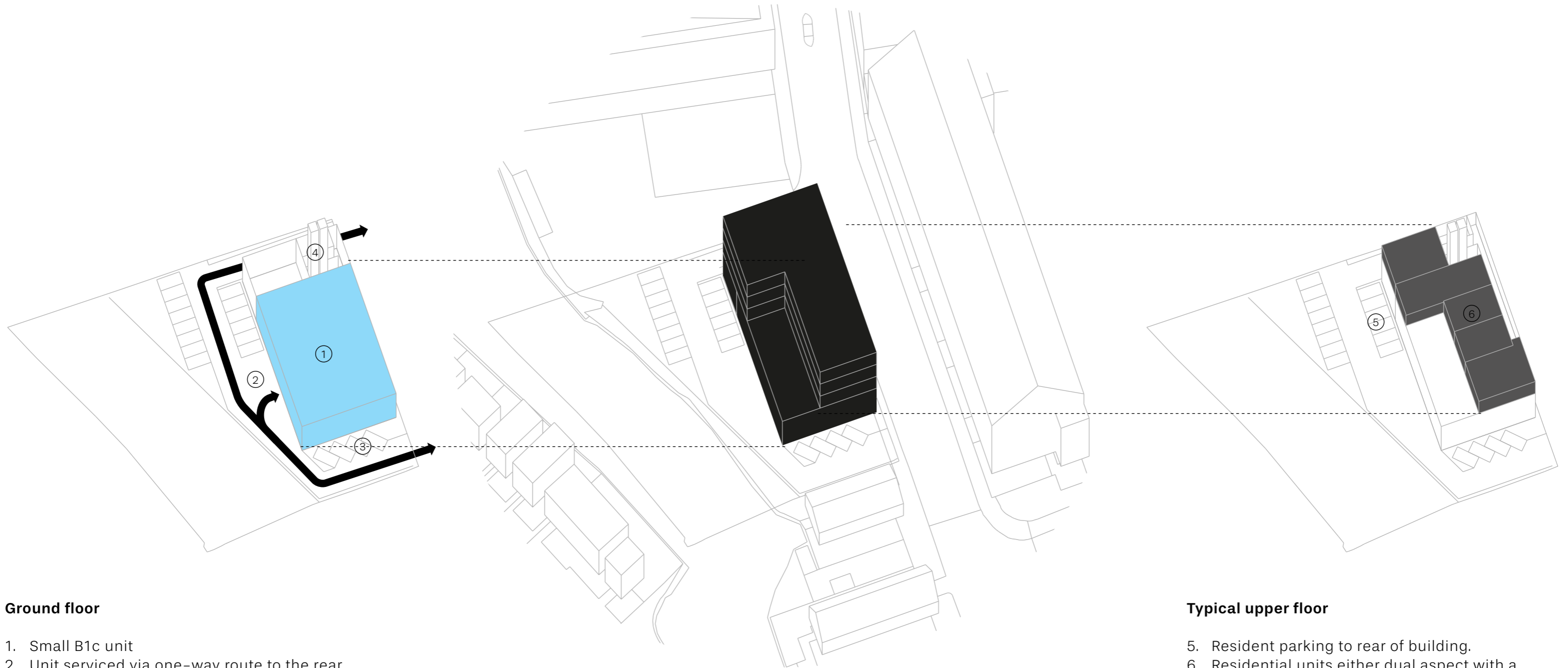
Bow Enterprise Park, Tower Hamlets

- Small B1(c) 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 B1(a), B1(c) 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 B1c unit
2. Unit serviced via one-way route to the rear, enabling unit to create a positive frontage onto street.
3. Employee parking and entrance to workspace.
4. Residential core separated from workspace entrance.

**Typical upper floor**

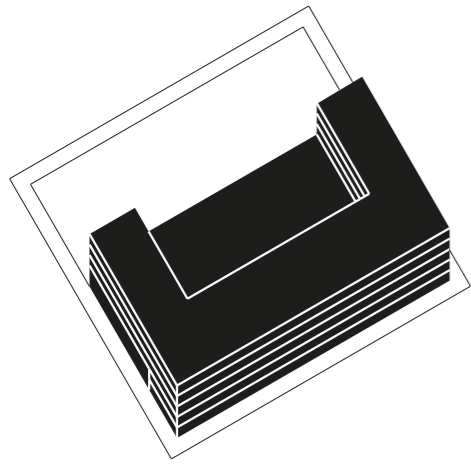
5. Resident parking to rear of building.
6. Residential units either dual aspect with a primary access avoiding direct view of yard and parking or stepped back at first floor to mask direct view of yard.

**Typology Density**

6,360 m<sup>2</sup> employment floorspace per ha

|                       |                     |                |                             |
|-----------------------|---------------------|----------------|-----------------------------|
| B1(c) NIA             | 389 m <sup>2</sup>  | B1 (c) density | 2,890 m <sup>2</sup> per ha |
| C3 NIA                | 1202 m <sup>2</sup> | C3 density     | 91 units per ha             |
| Ext. Operational Area | 450 m <sup>2</sup>  |                |                             |

**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

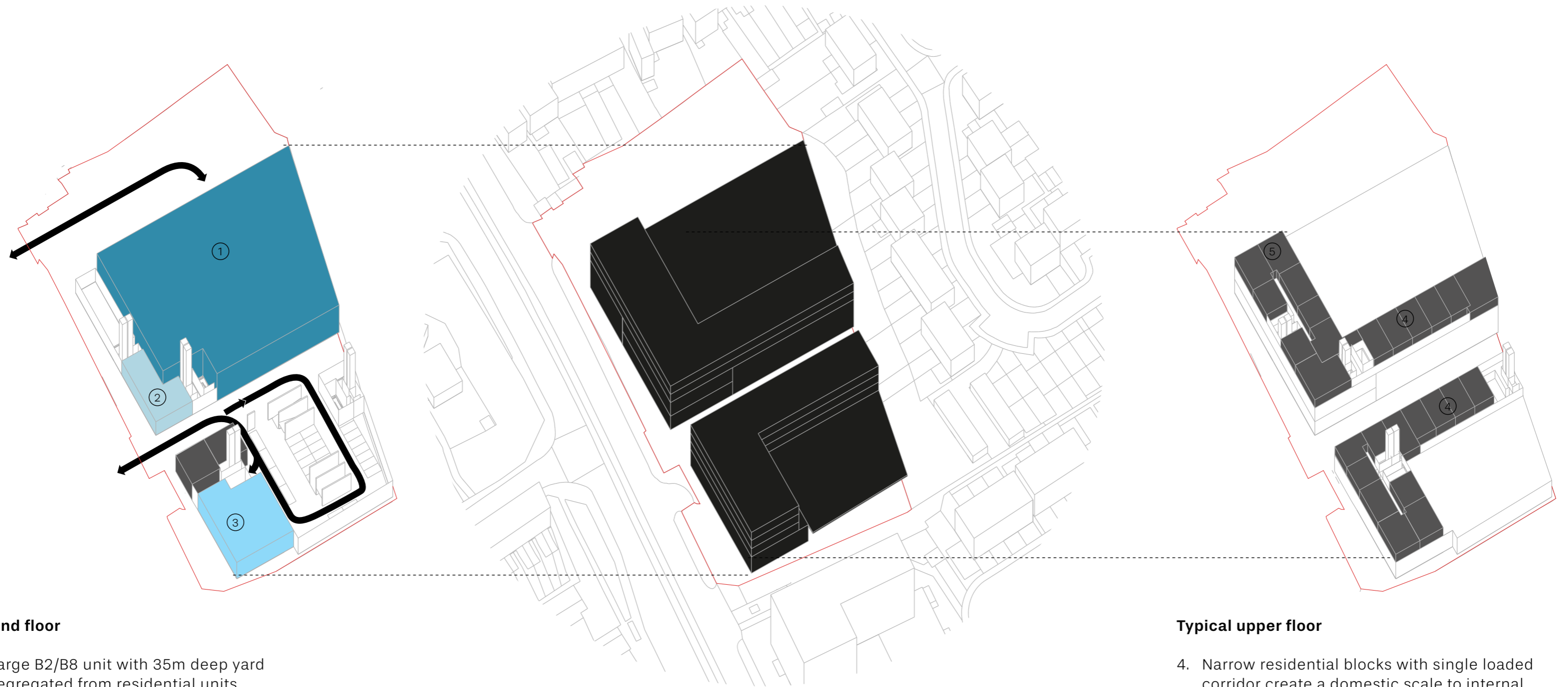
Multi-storey requirements N/A

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 B1c unit serviced via underground car park to rear, enabling workspace to create active frontage.

**Typology Density**  
7,140 m<sup>2</sup> employment floorspace per ha

|                       |                      |                |                             |
|-----------------------|----------------------|----------------|-----------------------------|
| B1(a) NIA             | 380 m <sup>2</sup>   | B1 (a) density | 410 m <sup>2</sup> per ha   |
| B1(c) NIA             | 389 m <sup>2</sup>   | B1 (c) density | 420 m <sup>2</sup> per ha   |
| B2/B8 NIA             | 2706 m <sup>2</sup>  | B2/B8 density  | 2,910 m <sup>2</sup> per ha |
| C3 NIA                | 3365 m <sup>2</sup>  |                |                             |
| Ext. Operational Area | 2,830 m <sup>2</sup> |                |                             |

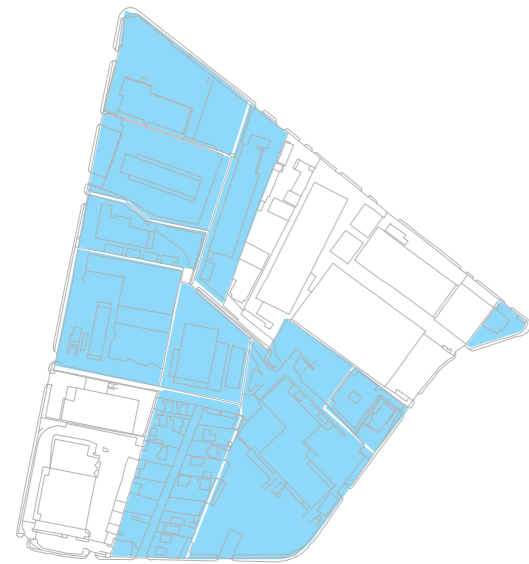
**Typical upper floor**

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**

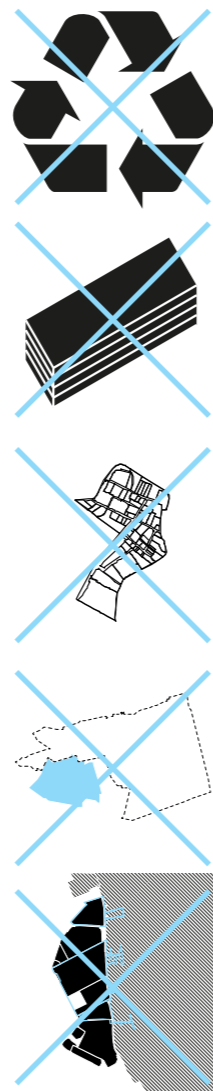
**Intensification Sites**

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



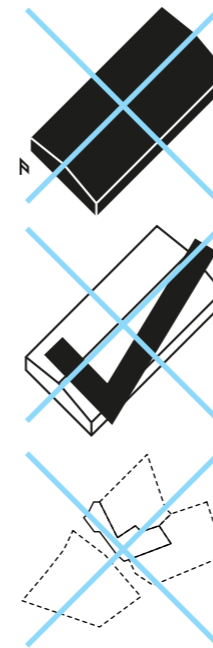
**Exclusions - strategy**

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



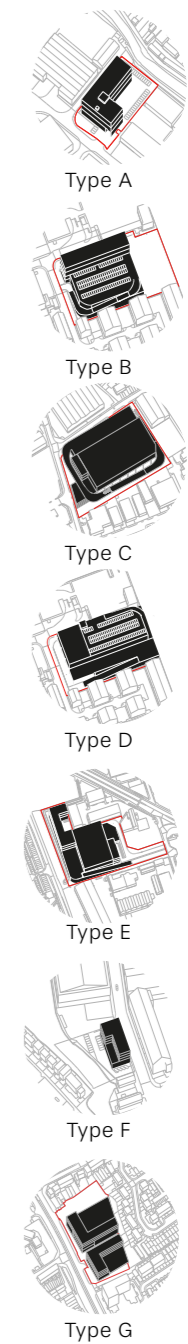
**Exclusions - delivery**

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 89). 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                         |

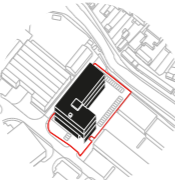
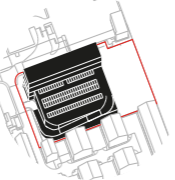
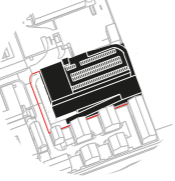
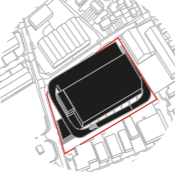
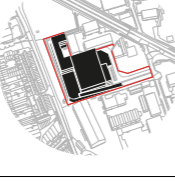
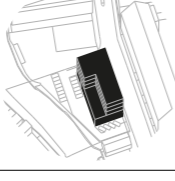
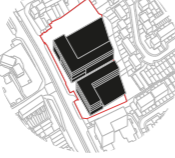
\* Residential co-location types tested with 50 % affordable housing

**Suitable Type  
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   | -              | -                          | -    | -                              | -  | -   |

## Development Capacity Test 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.

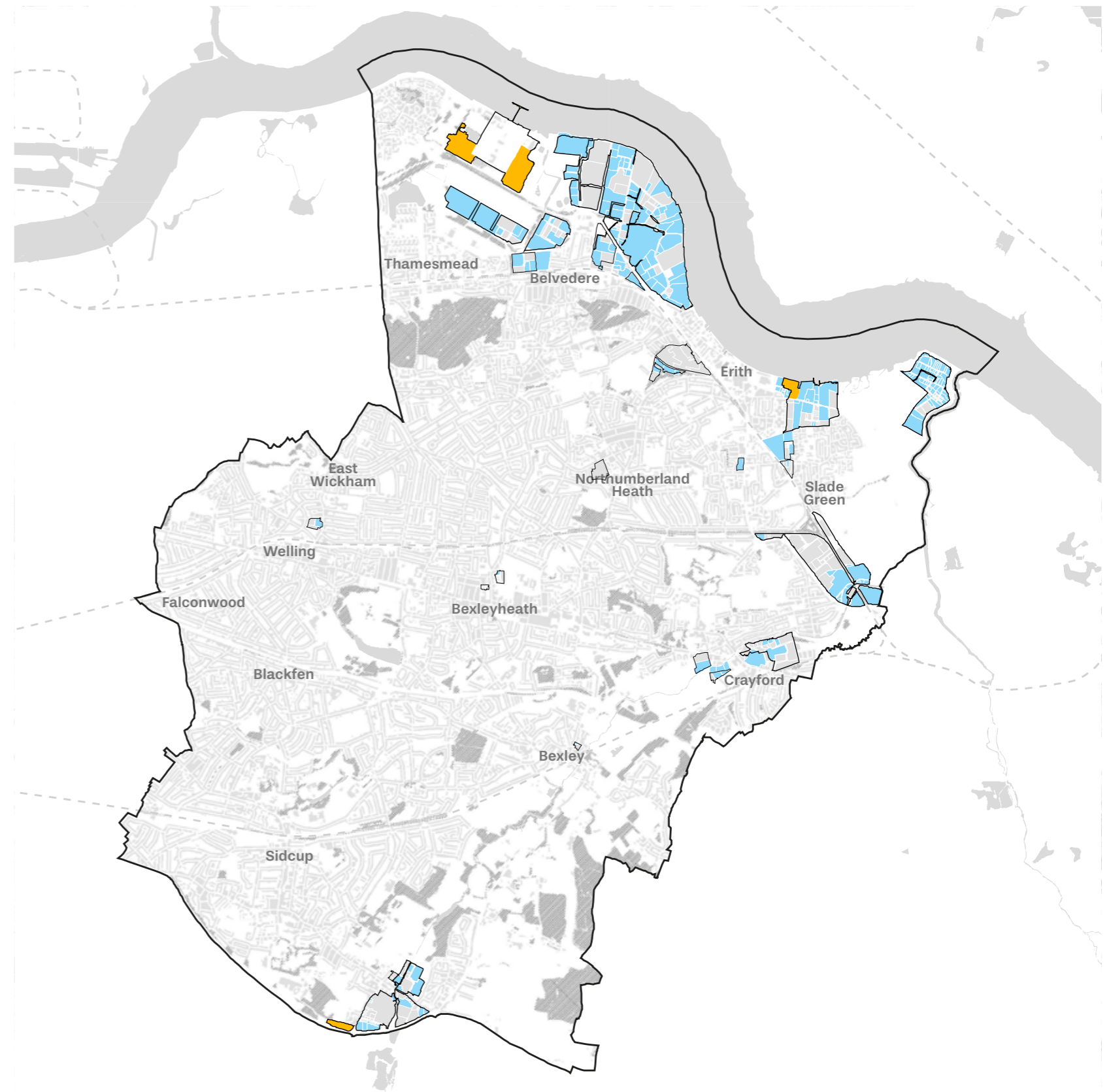
In subsequent calculations of the potential uplift in industrial capacity on each site, existing sites that are cleared and vacant are assumed to have a potential floorspace capacity of 65% the site area. External operational area for these sites is assumed to be an additional 17% of site area. This 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 and 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)



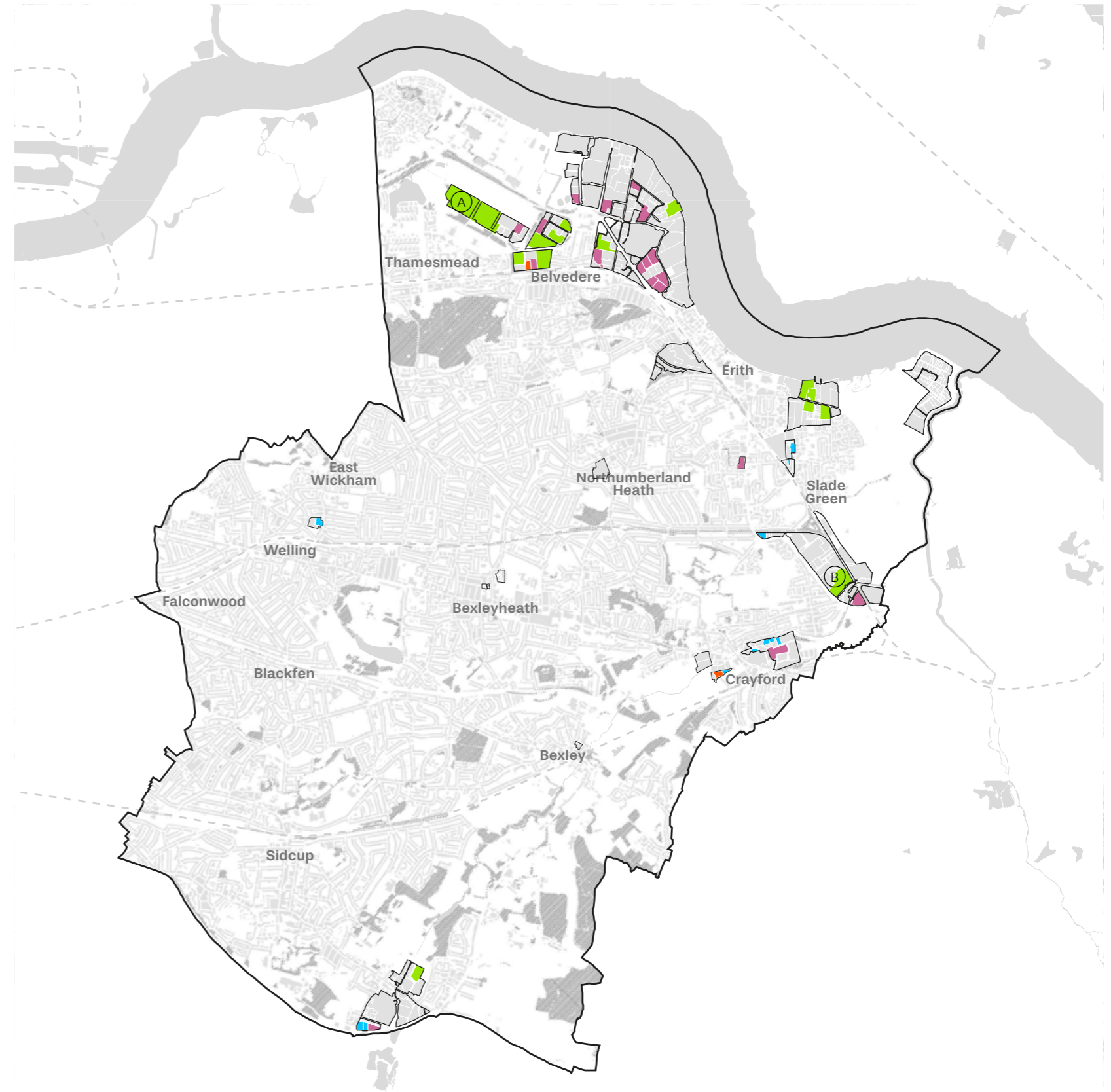
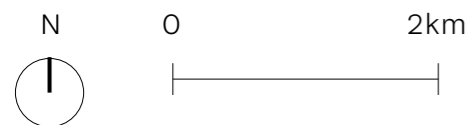
## Intensification Capacity Type

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       | -              | -                    | -                       | -               | -                    | -                       |
| <b>Total</b> | <b>291,134</b> | <b>-6,678</b>        | <b>283,407</b>          | <b>139,423</b>  | <b>-6,199</b>        | <b>133,224</b>          |

### Key

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



## 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  
19,200m<sup>2</sup> Floorspace/27,800m<sup>2</sup> Operational Space

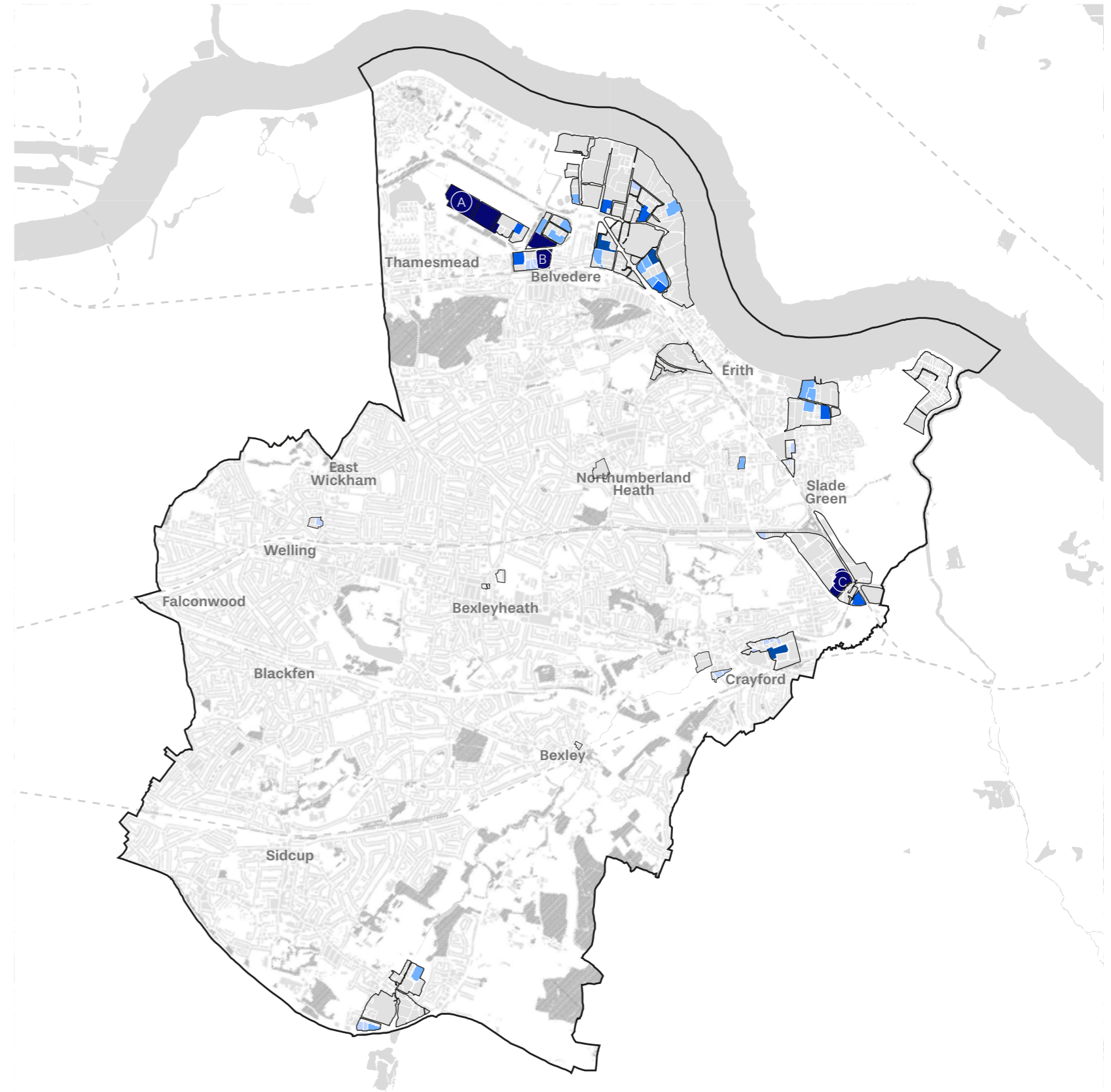
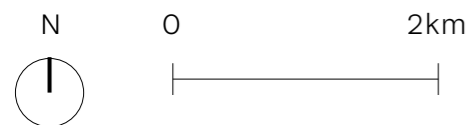
B SGN Gasholder Site  
29,700m<sup>2</sup> Floorspace /14,700m<sup>2</sup> Operational Space

C Vacant site at Thames Road  
11,000m<sup>2</sup> Floorspace/11,400m<sup>2</sup> 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                       |
| <b>Total</b>    | <b>291,134</b> | <b>-6,678</b>        | <b>283,407</b>          | <b>139,423</b>  | <b>-6,199</b>        | <b>133,224</b>          |

### Key

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

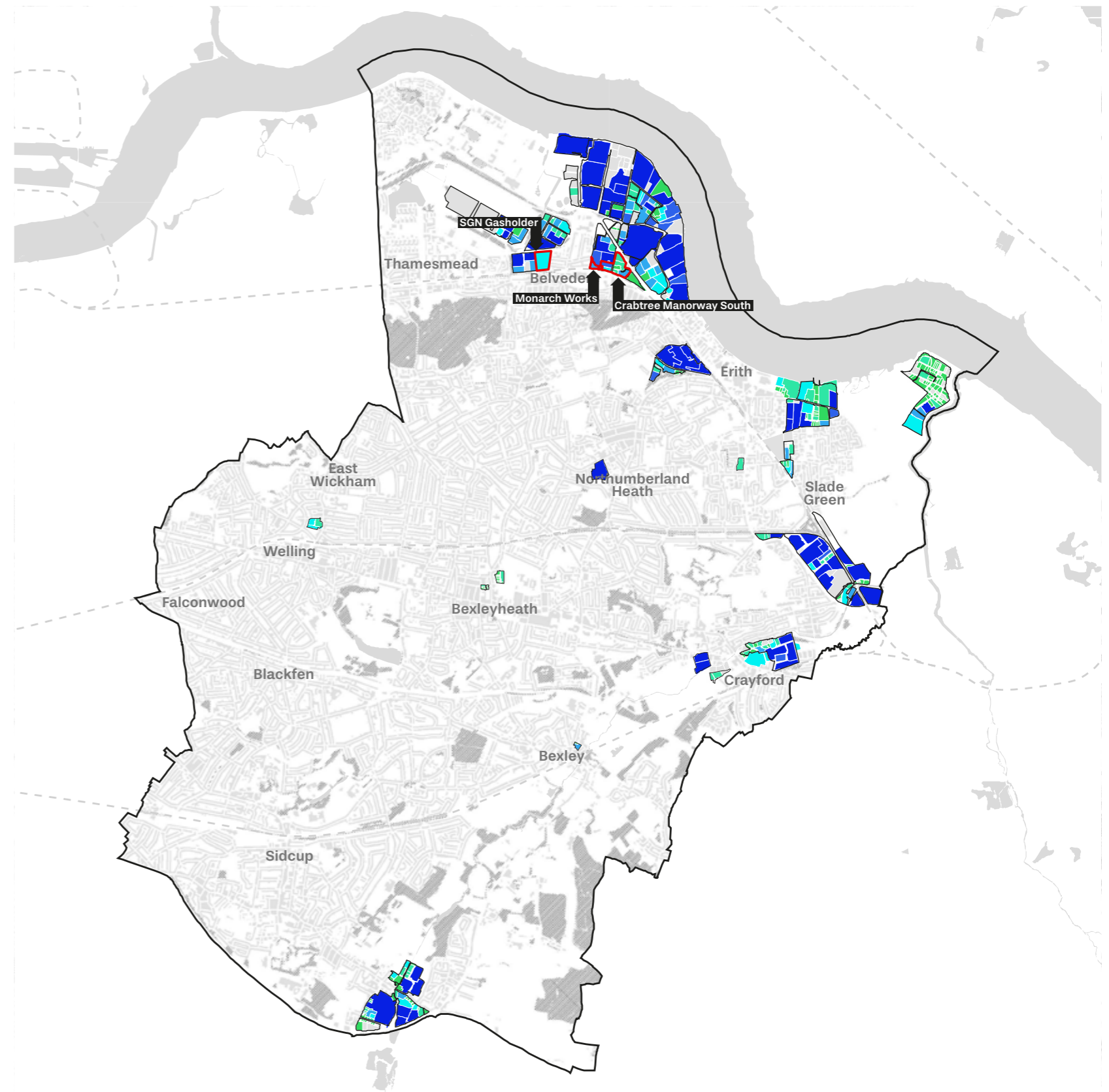
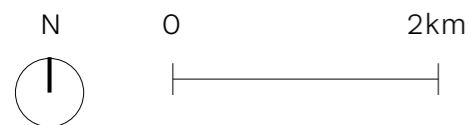
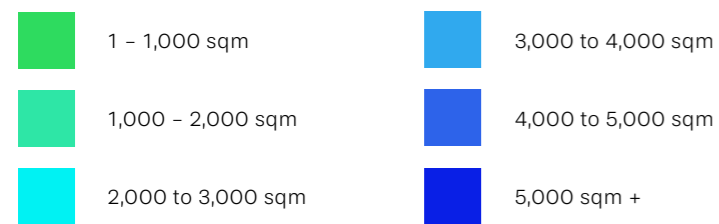


## Intensification Capacity Potential SIL Release

Site assessment for LBB Draft Local Plan Regulation 18 identify a three sites within SIL/LSIS that could be appropriate for release, SGN Gasholder (BV007), Monarch Works (BV010) and Crabtree Manorway South (BV012). Should these sites be released from their current SIL designation 19,630m<sup>2</sup> of floorspace 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 |
|--------------|---------------------------|---------------|---------------------------|------------------------|
| BV007        | SGN Gasholder             | 0             | 0                         | 0                      |
| 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                  |
| <b>Total</b> |                           | <b>19,630</b> | <b>29,510</b>             | <b>51,380</b>          |

### Key



## 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)   |   |
| <p><b>Scenario 1</b><br/><b>Coordination of very large sites</b><br/>Veridion Park and Thames Road sites deliver uplift in capacity as identified in this strategy</p>                         | Veridion Park and Thames Road  | <b>671%</b> 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.   |
| <p><b>Scenario 2</b><br/><b>No coordination of very large sites</b><br/>Lack of landowner engagement means no net capacity delivered on Veridion Park and Thames Road sites.</p>               | Smaller in-intensification sites   | <b>78%</b> 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 typologies available to planning officers for use in pre-application discussions. Update design guidance to identify suitable types for sites. |
| <p><b>Scenario 3</b><br/><b>No large units on upper storeys</b><br/>Viability of larger stacked warehouse typologies undermined by willingness of occupiers to take space on upper storeys</p> | Typologies A, B and C  | <b>138%</b> 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.                    |
| <p><b>Scenario 4</b><br/><b>Outer Belvedere only</b><br/>Sites in Outer Belvedere intensify at capacity identified in this strategy</p>  | Outer Belvedere  | <b>179%</b> 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.  |
| <p><b>Scenario 5</b><br/><b>Erith only</b><br/>Sites in Erith intensify at capacity identified in this strategy</p>  | Erith  | <b>271%</b> 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 infrastructure and coordination of intensification across the area.  |





## Intensification Capacity Site Rank

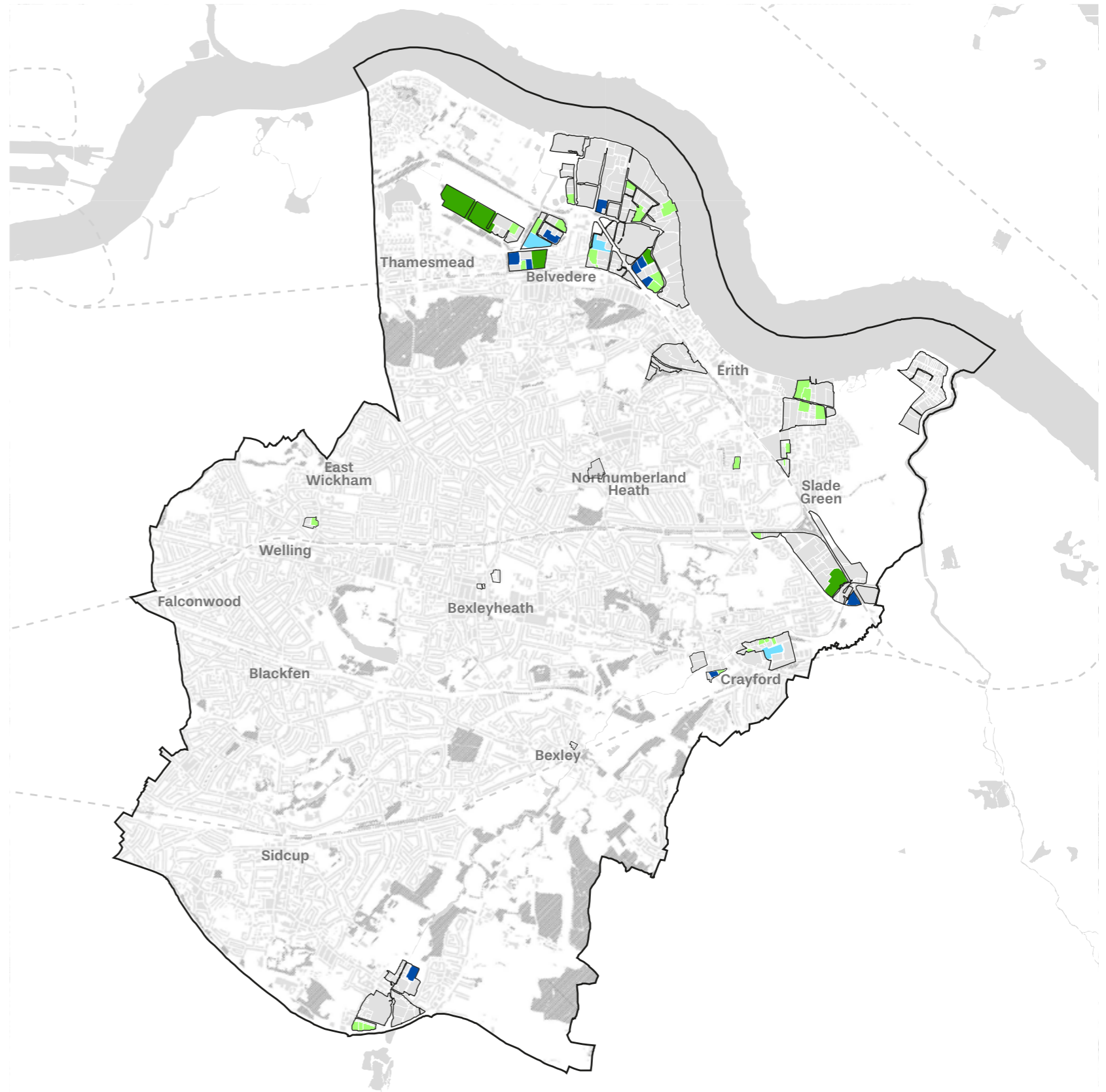
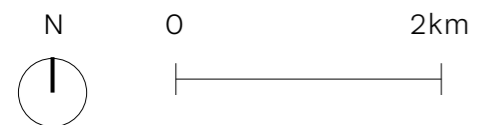
The map opposite summarises the geographical distribution of potential industrial intensification sites across the borough.

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



## 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 SPD and Local Plan as appropriate.

Particular parameters should be referred to in order to ensure developers are required to optimise their sites. This should follow the site characteristics set out on page 29 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 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

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### 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<br>(Maximum age of projects)                        | £/m <sup>2</sup> gross internal floor area |        |                 |        |                 |         | Sample |
|---|--|--------|-----------------|--------|-----------------|---------|--------|
|   | Mean                                       | Lowest | Lower quartiles | Median | Upper quartiles | Highest |        |
| <b>New build</b>  |  |        |                 |        |                 |         |        |
| <b>282. Factories</b>   |  |        |                 |        |                 |         |        |
| 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     |
| <b>282.1 Advance factories</b>  |  |        |                 |        |                 |         |        |
| 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      |
| <b>282.12 Advance factories/offices - mixed facilities (class B1)</b> |  |        |                 |        |                 |         |        |
| 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     |
| <b>282.2 Purpose built factories</b>                                  |  |        |                 |        |                 |         |        |
| 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     |
| <b>284. Warehouses/stores</b>   |  |        |                 |        |                 |         |        |
| 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     |
| <b>284.2 Purpose built warehouses/stores</b>                          |  |        |                 |        |                 |         |        |

| Building function<br>(Maximum age of projects) | £/m <sup>2</sup> gross internal floor area |        |                 |        |                 |         | Sample |
|--|--|--------|-----------------|--------|-----------------|---------|--------|
|  | Mean                                       | Lowest | Lower quartiles | Median | Upper quartiles | Highest |        |
| 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      |
| <b>320. Offices</b>                            |  |        |                 |        |                 |         |        |
| Generally (15)                                 | 2,397                                      | 1,189  | 1,743           | 2,200  | 2,791           | 7,324   | 117    |
| <b>Air-conditioned</b>                         |  |        |                 |        |                 |         |        |
| 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      |
| <b>Not air-conditioned</b>                     |  |        |                 |        |                 |         |        |
| 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      |
| <b>344. Hypermarkets, supermarkets</b>         |  |        |                 |        |                 |         |        |
| 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      |
| <b>345. Shops</b>                              |  |        |                 |        |                 |         |        |
| 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      |
| <b>532. Community Centres</b>                  |  |        |                 |        |                 |         |        |
| Generally (20)                                 | 2,863                                      | 1,127  | 2,244           | 2,698  | 3,273           | 8,347   | 92     |
| <b>Up to 500m2 GFA</b>                         |  |        |                 |        |                 |         |        |
| 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      |
| <b>500 to 2000m2 GFA</b>                       |  |        |                 |        |                 |         |        |

| Building function<br>(Maximum age of projects) | £/m <sup>2</sup> 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      |
| <b>Over 2000m<sup>2</sup> GFA</b>              |  |        |                 |        |                 |         |        |
| 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 Gymnasias, fitness centres, etc (25)     | 2,515                                      | 1,082  | 1,555           | 2,246  | 3,187           | 4,297   | 9      |
| <b>810.1 Estate housing</b>                    |  |        |                 |        |                 |         |        |
| 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     |
| <b>810.12 Estate housing semi detached</b>     |  |        |                 |        |                 |         |        |
| 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     |
| <b>810.13 Estate housing terraced</b>          |  |        |                 |        |                 |         |        |
| 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      |
| <b>816. Flats (apartments)</b>                 |  |        |                 |        |                 |         |        |
| 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/SFY | 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 | FRI     | 440,948 | Industrial       |                    |                   |                |                   | Direct     | 15 yrs      |            |             | 05/06/2023  | 04/06/2033                | TCW Solutions           | Completed | New          | 05/06/2018 | 9                                       | Glenny LLP                                    | 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  | 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     | 67,912  | 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     | 10 yrs      |            |             |             |                           |                         | 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 | FRI     | 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 | FRI     | 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 | Swaissland 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    | FRI     | 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 | Swaissland 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      |            |             |             |                           | Vindor 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        | 3,800           | 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            | Er        |             |                 |             |           |         |         |                  |                    |                   |                |                   |            |             |            |             |             |                           |                         |           |              |            |   |   |                   |                |            |  |

| 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 quartil 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  | Acom 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     | 7,900.00   | 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        |                                 | 163402641     |                   |                |
| 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 Bellegrave 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 Bellegrave 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 Bellegrave 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 Bellegrave 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      |