AVISON YOUNG

Bromley
THE LONDON BOROUGH

London Borough of Bromley

Employment Land and Space Study

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Contents

Annexes

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For and on behalf of Avison Young (UK) Limited and Maccreanor Lavington Limited.

1. Introduction

1.1 Avison Young and Maccreanor Lavington have been commissioned by the London Borough of Bromley (LBB) to prepare an Employment Land and Space Study (ELSS) to support the review of its Local Plan. The purpose of the study is fourfold:

1. To provide an understanding of the future employment floorspace and land needed to accommodate economic growth in Bromley based on industry-accepted economic projections.
2. To establish the nuanced commercial typologies that would support economic growth in different parts of the borough.
3. To determine whether Bromley's current employment land supply could meet this identified need, incorporating an assessment of the potential capacity of the borough's opportunity sites, or whether additional land should be allocated for employment uses.
4. To set out borough-wide policy recommendations related to employment floorspace and land, as well as granular place-based propositions to guide future development activity on sites that present opportunities for economic growth.

1.2 The study goes beyond typical employment land studies as it explores opportunities for industrial intensification, establishes the nature of employment space that is suitable in different parts of the borough and provides clear place-based propositions to guide development activity in opportunity areas.

1.3 The study will be used by LBB to inform its approach to the provision, protection, release and/or enhancement of employment land and premises. It updates and builds on the *Bromley Economic Development and Employment Land Study* (2010) which was used to inform the current *Bromley Local Plan* (2019).

Study Approach

1.4 The study is split across six chapters to provide a clear overview of both demand for and supply of employment land and space. They are:

- **Policy Context: Understanding the Multi-Scalar Policy Position.**
  - This chapter sets out changes to the national, regional and local policy landscape since the publication of the last *Bromley Economic Development and Employment Land Study* (2010) to highlight the changing context and provide an understanding of the policies, methodologies, objectives, and ambitions that this document needs to respond to.
- **Demand Context: Exploring Demand Signals for Employment Land.**
  - This chapter sets out demographic, economic and commercial trends to explore demand signals and consider current and future drivers of economic growth. The results of this analysis inform the scenario tests undertaken to determine future employment land need.
- **Need Context: Determining Future Employment Land Need.**
  - This chapter determines future need for employment land through different industry-accepted forecasts, incorporating a consideration of scenarios and sensitivities informed by the demand context.
- **Supply Context: Establishing Current and Future Employment Land Supply.**
  - This chapter establishes the total quantum of existing and future employment floorspace and land supply in Bromley through a combination of desk-based research and site visits. It also identifies existing sites that have the potential for increased capacity via redevelopment, intensification and/or colocation.
- **Future Requirements: Considering Current and Future Employment Space Requirements.**
  - This chapter establishes the future employment space requirements for Bromley's growth sectors. Going beyond broad use classes it sets out borough-specific space typologies that respond to the local context.
- **Place Propositions: Investigating the Potential of Existing Employment Land.**

- This chapter sets out place-based propositions for the employment sites that present the greatest opportunities for intensification and economic diversification. These set out an overall ambition for each location and identify the potential floorspace uplift that development could deliver in these areas.

1.5 These chapters build on one another to provide a clear overview of employment land issues in Bromley and are brought together at the end of the study to provide a view on whether identified need can be supported on existing sites or whether alternative approaches are required (see Figure 1). Recommendations are provided to offer a direction of travel on how to best utilise the borough's land in deliverable way.

1.6 This approach responds to, and goes beyond, the methodology set out in the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG) relating to economic development needs assessments. In line with the NPPF's definition of economic development the study focuses on the following use classes:

- **Class EG(i) - Office:** Offices to carry out operational or administrative functions (former B1a).
- **Class EG(ii) - Office:** Research and development of products or processes (former B1b).
- **Class EG(iii) - Industrial:** Light industrial processes (former B1c).
- **Class B2 - Industrial:** General industrial other than those falling in class EG(iii), typically comprising factory and manufacturing space.
- **Class B8 - Warehousing:** Warehouses, storage and distribution.
- **Sui Generis - Industrial:** Appropriately located uses in industrial locations (e.g. data centres, scrapyards, display of motor vehicles etc).

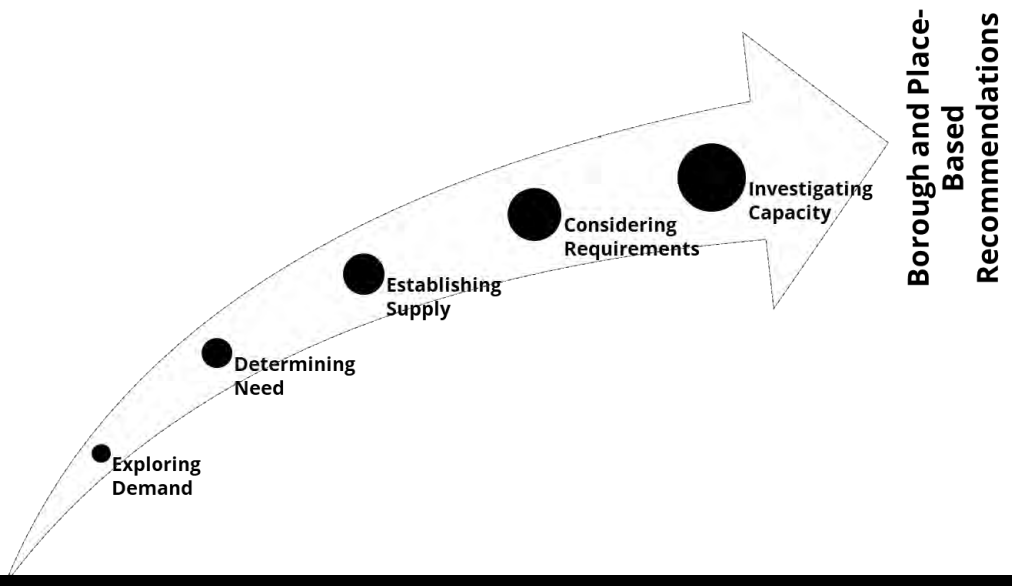


Figure 1: Employment Land and Capacity Study Approach

1.7 It also focuses on five 'groups' of employment land:

- Strategic Industrial Locations (SIL).
- Locally Significant Industrial Locations (LSIS).
- Office Clusters (OCs).
- Business Improvement Areas (BIAs).
- Non-designated employment land clusters.

1.8 Throughout the document the borough's economic, social and commercial position is benchmarked against its neighbours and Outer South London more broadly. As Figure 2 shows, Bromley's neighbours are the London Boroughs of Bexley, Greenwich, Lewisham, Southwark, Lambeth and Croydon, as well as Sevenoaks,

Dartford[1] and Tandridge boroughs across Kent and Surrey. Outer South London incorporates the London Boroughs of Bexley, Bromley, Greenwich, Croydon, Sutton, Merton, Kingston-Upon-Thames and Merton-Upon-Thames.

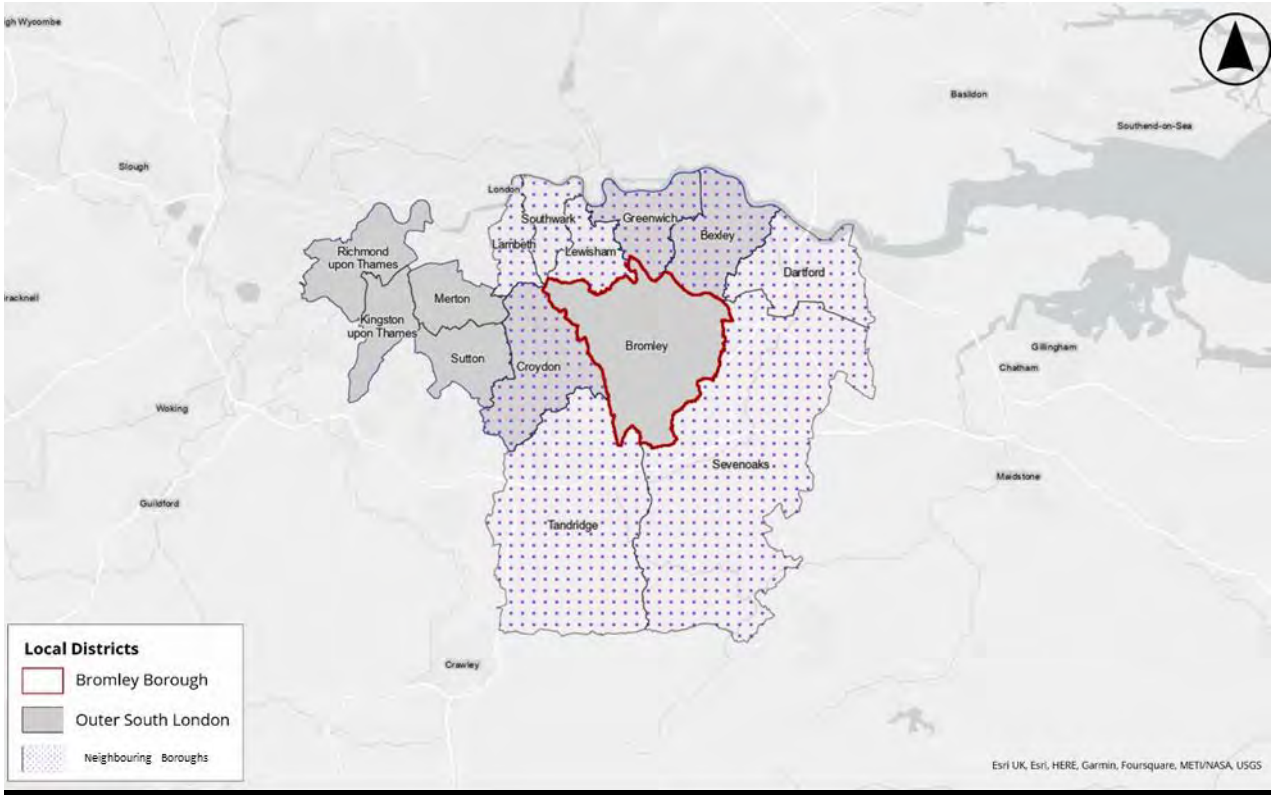


Figure 2: Study Geography and Comparators

[1] Dartford is not technically an 'immediate' neighbour to Bromley as the borough boundaries do not touch, but it has been included as a comparator for analysis given it is very close to Bromley and shares some economic and commercial market similarities.

2. Policy Context: Understanding the Multi-Scalar Policy Position

Chapter Summary

This chapter sets out changes to the national, regional and local policy landscape since the publication of the last *Bromley Economic Development and Employment Land Study* (2010) to highlight the changing context and provide an understanding of the policies, methodologies, objectives, and ambitions that this study should respond to. Key messages include:

- Since the last *Employment Land Study* the Government has published several iterations of its *National Planning Policy Framework* (NPPF) which sets out its overarching planning policies for England. The latest revision was in December 2023 which, like its predecessor from July 2021, sets out a continued instruction to enact a *presumption in favour of sustainable development* through plan making and decision taking. The main addition to recent iterations of the NPPF is increased support for the storage and distribution sector as well as other high productivity industries.
- The *Planning Practice Guidance* (PPG) has been revised with the newest iteration published in February 2019 this provides updated methodologies for local planning authorities to follow to assess the demand for and supply of housing and economic development in their area in accordance with the NPPF. This guidance, alongside the minor update issued in July 2019, will be followed as part of this study.
- The *Town and Country Planning (Use Classes) Order (Amendment) (England)* has also been published since the last *Employment Land Study* and came into effect on 1st September 2020. This includes the introduction of the new Use Class E which subsumes the previous A1, A2, A3, B1, D1 and D2 use classes meaning that planning permission is no longer required for change of use between these former classes.
- Major changes were also made to the *General Permitted Development Order* (GDPO) in 2020. These include the introduction of Class ZA, Class AA and Class MA which provide landowners and developers with new Permitted Development Rights related to office and industrial space.
- A new *London Plan* (2021) has been published by the Mayor of London since the last *Employment Land Study* which sets out a new framework for the city s development over the next two decades. It is different to previous iterations as it focuses on *Good Growth* growth that is socially and economically inclusive and environmentally sustainable. It has a stronger emphasis on industrial land than previous iterations it consumes over a third of its economic policies.
- The Mayor of London has also published his *Economic Development Strategy for London* (2018). This identifies both a need to *retain sufficient industrial land to keep the economy functioning efficiently* , and *[provide] a substantial amount of new office space to accommodate the growth of the services sector*".
- Local London has published the *Local London Plan Towards 2026* (2023) as an important sub regional document since the last *Employment Land Study* (2010). This document sets out the ambitions and work programme for the North East and South East London over the next three years, focusing on three key pillars of People, Place and Sustainability.
- LBB s *Local Plan* (2019) set out the future development strategy for the borough and provides a framework to guide planning decisions. This is currently undergoing a review and this study will feed into this process. Under this Local Plan the importance of Bromley's employment sites is identified, with specific protection for the Cray Valley Strategic Industrial Location, three Strategic Employment Growth Locations (Bromley Town Centre, Cray Business Corridor and Biggin Hill Strategic Outer London Development Centre) and twelve Locally Significant Industrial Sites.
- The Bromley *Local Plan* (2019) evidence base identifies *a significant requirement for office space, driven by business services and financial services, as well as growth in employment in utilities, wholesale, retail and transport/storage".* It also states that *industry and warehousing remain important elements of the local economy . In particular, demand anticipated for office space is to be nurtured in the Borough s Town Centres and Office Clusters over the short, medium and long term* .
- The Local Plan identifies that *it is important to consider how best to protect the Borough s employment lands and office accommodation for future business needs, whilst encouraging improvements to the existing stock and quality of environment* .

National Context

National Planning Policy Framework (NPPF) (2023), Ministry of Housing, Communities and Local Government

2.1 Since the publication of the last *Bromley Economic Development and Employment Land Study* (2010) Government has published several iterations of its National Planning Policy Framework (NPPF) which sets out its overarching planning policies for England. The latest revision was in December 2023 which, like its predecessor from July 2021, sets out a continued instruction to enact a *"presumption in favour of sustainable development"* through both plan making and decision taking.

2.2 By this, the Government mean that the planning system should achieve three objectives: economic, social and environmental. The system should help build a *"strong, responsive and competitive economy"*, support *"strong, vibrant and healthy communities"* and contribute to *"the protection and enhancement of the natural, built and historic environment"*.

2.3 As with previous iterations of the Framework, the latest version makes it clear that Local Planning Authorities (LPAs) should proactively plan to meet the employment land and development needs of businesses through their Local Plans. Local land targets should still be tested through the Local Plan process and LPAs must collect and use reliable information to justify employment land supply policies.

2.4 The latest Framework also indicates that LPAs should continue to ensure that Local Plans are based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of their area. LPAs are to ensure that their strategies for housing, employment and other uses are integrated and take full account of relevant market and economic signals.

2.5 Chapter 6 still states that *"significant weight"* should be placed on the need to support economic growth and productivity through the planning system. To help achieve this economic growth planning policies are to:

- *"Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth".*
- *"Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period".*
- *"Seek to address potential barriers to investment such as inadequate infrastructure, services or housing or a poor environment".*
- "Be flexible to accommodate needs not previously anticipated in the plan, allowing for new and flexible working practices and to enable a rapid response to economic changes".

2.6 Paragraph 126 also sets out that planning policies need to reflect changes in demand for land and should be informed by regular reviews of the land allocated for development and land availability. Therefore, where there is no reasonable prospect of development, allocated sites should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

2.7 The updated Framework still states that LPAs and County Councils (in two tier areas) have a duty to cooperate with each other on planning issues that cross administrative boundaries. It suggests that strategic policy making authorities should engage with their local communities and relevant bodies including Local Enterprise Partnerships (LEPs), Council Councils, infrastructure providers and Combined Authorities.

2.8 One change versus older iterations of the Framework (bar July 2021) is the introduction of Paragraph 87 which supports storage and distribution operations and highly productive technology industries. Planning policies are now expected to recognise and address the specific locational requirements of these sectors and others. The recognition of storage and distribution operations is considered overdue and reflects the growing role that logistics activities play in the wider economy.

National Planning Practice Guidance (PPG) (2019), Ministry of Housing, Communities and Local Government

2.9 The Planning Practice Guidance (PPG) has also been revised recently with the newest iteration published in February 2019 – this provides updated methodologies for LPAs to follow to assess the demand for and supply of housing and economic development in their area in accordance with the requirements of the NPPF. A further revision related to storage and distribution and specialised sectors was issued in July 2019.

2.10 The revised PPG acknowledges that national economic trends will not apply universally and business needs will vary according to local circumstances and market conditions. It therefore states that LPAs should continue to liaise closely with the business community to understand their current and potential future requirements – they are expected to consider:

- *"The recent pattern of employment land supply and loss to other uses".*
- *"Market intelligence (from local data, discussions with developers and property agents and engagement with business and economic forums)".*
- *"Market signals such as changes in rental values and differentials between land values in different uses".*
- *"Public information on employment land and premises required".*
- *"Information held by other public sector bodies and utilities in relation to infrastructure constraints".*
- *"The existing stock of employment land which should indicate the demand for and supply of employment land and determine the likely business needs and future market requirements".*
- *"The locational and premises requirements of particular types of businesses".*
- *"Potential oversupply and evidence of market failure".*

2.11 When examining the recent take-up of employment land, the revised PPG advises that it remains important to consider projections (based on past trends), forecasts (based on future scenarios) and occurrences where sites have been developed for specialist economic uses. In terms of forecasting future trends, it advises that:

- *"Plan makers should consider forecasts of quantitative and qualitative need i.e. the number of units and amount of floorspace but also its particular characteristics e.g. footprint of economic uses or proximity to infrastructure".*
- *"Local authorities should develop an idea of future needs based on a range of data which is current and robust".*
- *"Emerging sectors that are well suited to the area being covered by the analysis should be encouraged where possible".*
- *"The available stock of land should be compared with the particular requirements of the area so that 'gaps' in local employment land provision can be identified".*

It also states that plan makers should consider:

- *"Sectoral and employment forecasts and projections (labour demand)".*
- *"Demographically derived assessments of future employment needs (labour supply techniques)".*
- *"Analysis based on the past take up of employment land and property and/or future property market requirements".*
- *"Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics".*

2.12 To derive employment land requirements, it states that when translating employment and output forecasts into land requirements there are four key relationships which need to be quantified:

1. Standard Industrial Classification sectors to use classes.
2. Standard Industrial Classification sectors to type of property.
3. Employment to floorspace (employment density).
4. Floorspace to site area (plot ratio based on industrial proxies).

2.13 The July 2019 amendment extends the guidance by recognising the critical role of storage and distribution and the associated need for more warehousing space. It advises that strategic facilities serving national or

regional markets are likely to require significant amounts of land, good access to strategic transport networks, sufficient power capacity and access to appropriately skilled local labour. It suggests that need can be informed by engagement with *"logistics developers and occupiers to understand the changing nature of requirements in terms of type, size and location including impact of new technologies", "analysis of market signals, including trends in take up and availability of logistics land*", and *"analysis of economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities".*

Town and Country Planning Act (Use Classes) Order (Amendment) (England) (2020), HM Government

2.14 The *Town and Country Planning (Use Classes) Order (Amendment) (England)* has also been published since the last *Bromley Economic Development and Employment Land Study* (2010) and came into effect on 1st September 2020. This has fundamentally changed the Use Class Order that was used at the time of the previous study.

2.15 Most notable has been the introduction of the new Use Class E - *"Commercial, Business and Service".* This subsumes the previous A1 (Retail and Shops), A2 (Financial and Professional Services), A3 (Food and Drink), B1 (Office, Research and Development and Light Industrial), D1 (Non-Residential Institutions), D2 (Assembly, Leisure and Entertainment) uses into a single use class meaning that planning permission is longer required for change of use between these former classes. This includes the conversion or loss of office, research and development and light industrial space (former D1) to other categories with Class E.

2.16 The Residential (C classes), General Industrial (B2) and Storage and Distribution (B8) use classes remain unchanged by the amendments. The NPPF and PPG also remain unchanged and LPAs are still required to understand and plan for their business needs regardless of the Use Class Order amendments.

General Permitted Development Order (GPDO) (2020), HM Government

2.17 Major changes were also made to the General Permitted Development Order (GDPO) in 2020 which represents a material change to the context. Notably, it introduced Class ZA which allows for the demolition of a single detached building used for office, research and development or light industrial processes (previous B1 use class), or a free-standing purpose-built block of flats, to be replaced by an individual detached block of flats or a single detached house within the footprint of the old building, with up to two additional storeys. This applies to buildings that have been vacant for six months and were built before 31st December 1989.

2.18 The GDPO also introduced Class AA which allows for the construction of up to two new storeys of flats in the airspace above detached buildings in commercial (former A1, A2, A3 or B1a use classes) or mixed use, including where there is an element of residential use. This is unlikely to have as much of an impact on employment land as Class ZA, but could disrupt existing businesses and future re-development schemes (e.g. for out-of-town retail parks) if elements of residential are introduced on an ad hoc basis.

2.19 In April 2021 the Government also announced that they would introduce a new Permitted Development Right, known as Class MA, to allow the newly introduced Class E uses to be converted to residential use. This became law in August 2021 and applies to buildings that have been vacant for at least three continuous months prior to submission of the prior approval. Crucially, the previous right to convert an office of unlimited size to residential (under Class O) has been terminated and the new Class MA has a maximum limit of 1,500sqm (16,146 sqft) per building.

2.20 The Government is currently consulting on further amendments to Class MA (July 2023), including whether the floorspace limit should be doubled to 3,000sqm (32,291 sq ft) or removed completely to again allow offices of unlimited size to be converted. They have also put proposals forward related to the vacancy period, Article 2(3) land and conservation areas, and they are considering extending permitted development rights to Hotels, Boarding Houses and Guest Houses.

Regional Context

London Plan (2021), Greater London Authority

2.21 A new *London Plan* (2021) has been published by the Mayor of London since the last *Bromley Economic Development and Employment Land Study* (2010), which sets out the framework for the city's development over the next two decades. It is different to previous iterations as it focuses on *"Good Growth"* – growth that is socially and economically inclusive and environmentally sustainable.

2.22 *Chapter 6: Economy* is of particular note as it sets out policies related to London's economy and employment land. It is considered an important pillar of the whole document as it has a direct impact on achieving other strategic policies. It has seen many changes since the preceding London Plan, particularly in relation to industrial land which is now the focus on over one-third of its policies.

2.23 The most relevant policies are:

- **Policy E1:** This sets out that offices should be supported in locations such as town centres and existing urban business parks. It refers to evidence that indicates that future demand could exceed supply and it identifies locations outside the Central Activity Zone to support prime office development. It states that existing viable office floorspace capacity should be retained, supported by Article 4 Directions to remove Permitted Development Rights where appropriate, to facilitate the redevelopment, renewal and re-provision of office space where viable.
- **Policy E2:** This identifies that local Development Plans should support the provision and, where appropriate, protection of a range of B Use Class business space, in terms of type, use size and price point, specifically referring to supporting provision of low-cost accommodation.
- **Policy E3:** This asks boroughs to provide detailed affordable workspace policies in light of local evidence of need and viability. It defines affordable workspace as at *"rents maintained below the market rate for that space for a specific social, cultural or economic development purpose such as:*

    1. *For specific sectors that have social value such as charities, voluntary and community organisations or social enterprises.*
    2. *For specific sectors that have cultural value such as creative and artists' workspace, rehearsal and performance space and makerspace.*
    3. *For disadvantaged groups starting up in any sector.*
    4. *Supporting educational outcomes through connections to schools, colleges or higher education.*
    5. *Supporting start-up and early stage businesses or regeneration".*

- **Policy E4**: In alignment with the NPPF, this sets out an objective to ensure a *"sufficient supply of land and premises in different parts of London to meet current and future demands for industrial and related functions"*. Policies E4:A1 and E4:A2 state that provision of *"light and general industrial uses"* should be a mechanism of providing industrial economic development as well as *"storage and logistics/distribution (Use Class B8), including 'last mile' distribution close to central London and the Northern Isle of Dogs"*. Policy E4:A8 further states that that flexible (B1c/B2/B8) hybrid space is also important *"to accommodate services that support the wider London economy and population"*. As well as creating new industrial land, the London Plan is clear about the importance of retaining London's existing industrial land. Policy E4:C states that *"the retention, enhancement and provision of additional industrial capacity"* should be planned, monitored and managed for designated sites (notably Strategic Industrial Locations[2], Locally Significant Industrial Sites[3] and Non-Designated Industrial Sites).
- **Policy E5:** This stipulates that Strategic Industrial Locations (SILs) *"should be managed proactively through a plan-led process to sustain them as London's main reservoirs of industrial, logistics and related capacity"*.

[2] Strategic Industrial Locations (SILs) are London's main reservoirs of industrial and related capacity. There are two types of SILs: Preferred Industrial Locations (PIL) and Industrial Business Parks (IBP) – the former are suitable for industrial, wholesale, distribution, waste management and recycling and the latter are more suited to specialist industrial and office development. The London Plan states that development proposals within or adjacent to SILs should not compromise the integrity or effectiveness of these locations in accommodating industrial type activities.

[3] Locally Significant Industrial Sites (LSISs) are sites that have local importance for industrial and related functions, which complement provision in SILs.

London Boroughs are expected to "*define the detailed boundary of SILs in policies maps"* in order to locate, measure and compare socio-economic impact. They also need to *"develop local policies to protect and intensify the function of SILs and enhance their attractiveness and competitiveness".* Development proposals are to be supported where the uses proposed are industrial-type activities. London has around 55 SILs, one of which is in Bromley: St Mary Cray Industrial Area (see Figure 3).

Policy E5:D reemphasises the mandate of Policy E4:C *that "development proposals within or adjacent to SILs should not compromise the integrity or effectiveness of these locations in accommodating industrial type activities and their ability to operate on a 24-hour basis, for mainly B1c, B2 and B8 planning uses".* Any residential development that comes forward adjacent to SILs is expected to be designed to ensure that current or potential industrial activities are not compromised or curtailed.

- **Policy E6:** This makes clear that boroughs are expected to designate and define detailed boundaries and policies for Locally Significant Industrial Sites (LSISs), justified by evidence in local Employment Land Reviews. Boroughs are to make it clear in policy that a range of industrial and related uses are acceptable in LSISs.
- **Policy E7:** This sets out principles for industrial intensification, co-location and substitution. It states that Development Plans should be proactive and encourage the intensification of business uses in Use Classes B1c, B2 and B8 occupying all categories of industrial land through:

  - Introduction of small units.
  - Development of multi-storey schemes.
  - Addition of basements.
  - More efficient use of land through higher plot ratios having regard to operational requirements (including servicing) and mitigating impacts on the transport network where necessary.

  It states that industrial intensification should be considered in SILS and LSIS to provide additional capacity. It also identifies that intensification can be used in these contexts to *"support the delivery of residential and other uses, such as social infrastructure, or to contribute to town centre renewal"* if certain criteria are met – for example:

  - The industrial and related activities on-site and in surrounding areas are not compromised in terms of their continued efficient function, access, service arrangements and days / hours of operation noting that many businesses have 7-day / 24-hour access and operational requirements.
  - The intensified industrial, storage and distribution uses are completed and operational in advance of any residential component being occupied.
  - Appropriate design mitigation is provided in any residential element with particular consideration given to: safety and security; the layout, orientation, access, servicing and delivery arrangements of the uses in order to minimise conflict; design quality, public realm, visual impact and amenity for residents; vibration and noise; and, air quality, including dust, odour, and emissions and potential contamination.

  This must be considered as part of a plan-led process of SIL or LSIS intensification and consolidation in collaboration with the GLA.

- **Policy E8:** This sets out that employment opportunities should be promoted across the city by supporting business growth, including through the provision of a wide range of workspace types (e.g. accelerator space, flexible workspace, laboratory space, film studios, affordable workspace etc). It also identifies specific clusters and activities that should be supported (e.g. Tech City and MedCity). Most relevant to Bromley it sets out that boroughs should work with the Mayor to promote Strategic Outer London Development Centres (SOLDCs) that have one or more specialist economic functions of greater than sub-regional importance. It states that they should be supported by:

  - Encouraging local innovation to identify distinct economy strengths.
  - Co-ordinating infrastructure investment.

- Creating a distinct and attractive business offer and public realm.
- Ensuring that development complements the growth of town centres and other business locations.
- Bringing forward development capacity.
- Improving Londoner's access to employment opportunities.

Interestingly, unlike previous versions this London Plan does not identify any specific areas that should be designated as SOLDCs.

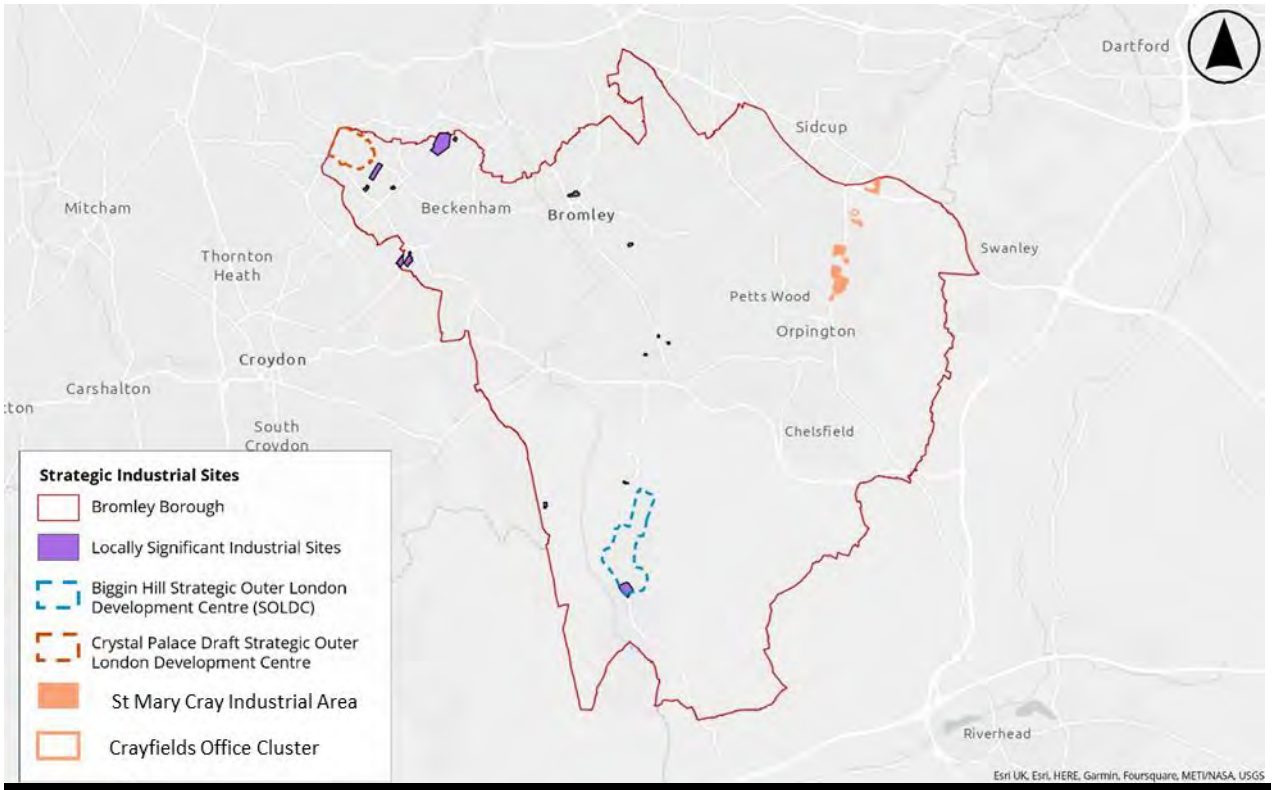


Figure 3: Bromley's Designated Employment Sites
Source: Bromley Local Plan (2019)

2.24 It is worth noting that the Mayor of London is currently consulting on an *Industrial Land and Uses LPG (London Plan Guidance)* document (2023). This provides additional guidance on industrial development to that set out in the *London Plan* (2021), in particular for Local Planning Authorities (LPAs) at plan-making stage. It provides clarity on how industrial demand-and-supply evidence should be considered and how to assess what is 'sufficient' to meet demand.

2.25 Importantly this *Bromley Employment Land and Space Study* aligns with much of the guidance presented in the document. This partly relates to the methodology that has been used to assess demand, but also how supply has been considered and analysed.

2.26 In line with this study, the *LPG* strongly advises LPAs to consider the potential to intensify and add industrial capacity to sites with stock in need of modernisation. It also encourages LPAs to allow the conversion or retrofitting of retail parks, secondary offices and other town centre uses to industrial where appropriate. It asks LPAs to *"devise a positive strategy"* around this and advocates the use of site allocations and designations to do this.

2.27 The LPG also encourages LPAs to use a criteria-based approach to identify intensification opportunities as has been done in this document. A series of criteria to guide decision-making is provided to guide LPAs analysis – many of these have been applied as part of this study. The document also sets out that LPAs may want to develop masterplans for some areas ahead of publishing their Development Plan Documents. They set out a two stage processes to do this, much of which has already been done from Bromley as part of this study:

1. Stage 1: Undertake study looking at supply, demand and infrastructure, and identify parts of SIL/LSISs that could undergo intensification, co-location and release.
2. Stage 2: Undertake detailed masterplanning including analysis of sub-areas and calculations of capacity.

This study identifies which sites should be considered for this type of exercise (see Chapter 7), and provides a large amount of background information for more detailed masterplans. Guidance on how these Stage 2 documents should be completed is provided in the *LPG.*

London Industrial Land Supply Study (2023), Greater London Authority

2.28 A key part of the evidence base for the *London Plan* (2021) is the *London Industrial Land Supply Study (2023).* This updates the previous *London Industrial Land Supply Study* (2015) by providing a comprehensive overview of London's industrial supply base, alongside an assessment of the economic function, character and role of SILs across the capital. Key messages from the study are set about below.

Key Message 1: Land Supply Pressures

2.29 *London's industrial land supply has shrunk significantly over the last 20 years, but the loss of land has occurred at the most significant rate in the last five years. The planning pipeline signifies that this trend is set to persist at an unprecedented rate.*

- The land use vacancy rate is just 4% (down consistently from 16% in 2001). The scale of decrease has been most pronounced since 2015.
- Land in industrial use in London has seen continued decline over the last 20 years, with heavy pressure from competing land uses, and particularly residential uses. Between 2001 and 2020, 355 ha of industrial land has been lost.
- The *London Industrial Demand Study (*2017) recommended a benchmark release of 232 ha between 2016 and 2041 but between 2015 and 2020 there has already been a loss of 352 ha, demonstrating erosion of land beyond the recommended release in all sub-regions. This has been most stark in East London but remains a challenge across the city.
- Looking at the future pipeline, there is an estimated 736 ha of land in industrial and related uses in the planning pipeline that could potentially change to non-industrial uses presenting even greater pressure on supply of land. About 30% of this is proposed Local Plan release from SIL or LSIS designations.
- Growth of non-industrial employment between 2015 and 2019 in designated industrial areas is particularly significant in some boroughs including Islington (+25%), Barking and Dagenham (+17%), Brent (+14%) and Harrow (+11%).

Key Message 2: Floorspace Supply Pressure

2.30 *Loss of industrial land in London has direct implications for floorspace, with a chronic (and worsening) undersupply of industrial stock. Of the stock that does exist, there is a significant challenge here around obsolescence particularly in the context of Minimum Energy Efficiency Standard (MEES) regulations.*

- Floorspace capacity in London is very tight, with vacancy currently sitting at 3.2%. This rate remains low across all unit typologies and geographies.
- The highest levels of vacancy are seen within the 25-50k sqft category (4.1%), whilst units sized 2.5-5k sqft and 100k+ sqft present the lowest vacancy level (each c.1.7%).
- At borough level, floorspace vacancy rates range from lower than 2% in Hackney, Harrow, Hounslow, Kensington and Chelsea and Richmond to 7% in Bromley and 8% in Sutton.
- The existing inventory of stock is dated. At least 60% of London's industrial buildings were completed or last renovated prior to 2000 and just 4% of stock was completed/last renovated post-2010. This indicates the need for new or upgraded stock, particularly in the context of MEES regulations, which requires all properties being let to achieve an EPC rating of E with this due to rise to C by 2030.

- Combined, an under-supply of industrial stock and a high risk of obsolescence presents a critical risk to the future vitality of the sector. Delivery of new stock will be of paramount importance to address these issues.

Key Message 3: Deep and Broadening Demand

2.31 *Against this supply context, industrial demand is at unprecedented levels in London across a whole host of uses and unit sizes. This demand/supply imbalance is driving strong rental value and capital value growth.*

- There has been significant growth in demand for 'big box' distribution stock fuelled by changing consumer habits and the growth of e-commerce. This has focused on key locations with good access to the strategic road network including Ealing, Barking and Dagenham and Enfield.
- The strength in demand for stock of this nature relative to the existing undersupply has been a significant factor driving increased industrial rents, capital values and land values across London.
- As the strength in demand is set to continue a growing development pipeline for 'big box' stock and continued upward pressure on rents and values are likely.
- This demand is expected to be supplemented by a growing market for non-traditional B-class uses including Film and TV Production with similar requirements for large floorplate space in Outer London.
- In addition, the changing nature of consumer habits and industrial trends indicate that demand is growing for a wider range of industrial typologies, including final mile distribution space which typically focuses on smaller floorplates and close proximity to residential areas.
- Headline industrial rents have seen strong growth – now at £19psf – which reflects a 36% uplift on the 10-year average of £14psf. As expected, smaller buildings reflect higher values psf, but there is a premium for 100k sqft plus, due to the depth of demand for logistics, and an array of wider uses the feed demand for units of this nature.
- Capital values reflect an even steeper trend, seeing 62% uplift on the 10-year average to reach £318 psf.
- These value shifts are indicative of a market with extremely tight, and worsening supply, against a growing basis of demand.

London Industrial Land Demand Study (2017), Greater London Authority

2.32 The *London Industrial Land Demand Study* (2017) also forms an integral part of the evidence base for the *London Plan* (2021). It assesses land demand for different types of industrial activities and quantifies the amount of industrial land London needs to maintain to ensure it continues to function as a successful and sustainable city. Key messages from the study include:

- The report projects a reduction in demand for general and light Industrial land to 166.5 ha over the period 2016-41. The study assumes that there will be a growth in warehouse demand of 280 ha over the period 2016-41.
- The major transport investment programme required to support London's growth to 2050 is expected to generate additional demand for industrial land. This will primarily include land for new rail and bus depots and for new stations. The GLA state that the overall scale of demand to 2050 could be around 200 ha or more.
- Combining the various projections together, the updated benchmark projections for London suggest that for the period 2016-41 a total of 233 ha of industrial land can be released or an average of 9.3 ha per annum.
- This figure is much a lower level of release than set out in the 2011 Industrial Land Benchmark study and can be explained by industrial land being released faster than the benchmark guidance, and current GLA economic projections showing industrial employment in London declining at a much slower rate than those which informed the previous study.
- This suggests much stronger policy is needed if industrial land releases are to be restricted to the benchmark targets. If industrial land were to continue to be released at the same rates when the report was realised the GLA project this would result in the loss of 1,630 ha of industrial land by 2041.

London Intensification and Co-Location Study (2019), Greater London Authority

2.33 Aligned with these preceding documents is the *London Intensification and Co-Location Study* (2019), which provides guidance on the acceptability of industrial intensification and co-location with residential, as well as testing the viability and deliverability of proposals based on the guidance provided. The study has shaped policies set out in the *London Plan* (2021) and can be used by landowners, developers and LPAs to make decisions about their industrial assets. The study covers the following five areas:

1. **Defining and Measuring Industrial Intensification** to support the implementation of planning policies and the assessment of planning applications.
2. **Specifications and Construction Costs** to provide definitions of industrial space specification to ensure industrial intensification with residential results in genuine 'industrial space'.
3. **Urban Scale Guidance** to provide guidance on the development of industrial intensification and associated co-location with residential beyond the individual site boundary.
4. **Testing Proposals** to test the broad viability of industrial intensification in London.
5. **Deliverability Commentary** to provide general commentary on wider deliverability issues and potential barriers to delivery, as well as any opportunities for market actors or requirements for public sector intervention of various kinds.

Mayor's Economic Development Strategy (2018), Greater London Authority

2.34 The Mayor's *Economic Development Strategy for London* (2018) has also been published since the last *Bromley Economic Development and Employment Land Study* (2010). This document summarises the diversity of London's economy, sets out key challenges London faces and identifies opportunities to curate a more inclusive, equitable and sustainable economy.

2.35 Chapter 4, Creating the Conditions for Growth, states that "industrial areas help to keep London's economy working effectively" however "industrial land in London has been lost at almost three times the benchmark set by the London Plan". Assuming sustained demand, lower industrial land supply equates to increased rents as well as higher road congestion as businesses are forced to move to cheaper industrial land locations away from London.

2.36 Despite this loss of industrial land, the "Mayor wants to ensure that London retains sufficient industrial land to keep the economy functioning efficiently", predominately by "intensifying the way London's industrial land is used, through more multi-storey industrial buildings with associated shared yard space or co-location alongside residential development; and help to enhance the physical condition of London's industrial estates by supporting the creation of Industrial Business Improvement Districts (BIDs)".

2.37 In addition to this, the Mayor identifies an ambition to support the growth in services across the city. The document, which was written before COVID-19, identifies a need for "a substantial amount of new office space to accommodate the growth of the services sector". It sets out that spaces should be accommodated "through new sites, redevelopment or intensification, otherwise rents could rise to uncompetitive levels and growth could be constrained". The Central Activities Zone and Isle of Dogs North (i.e. Canary Wharf) are identified as the main focus areas for office development, as well as Stratford, Old Oak and "viable office clusters in town centres (including those in outer London) as part of creating diverse local economies".

Local London Plan Towards 2026 (2023), Local London

2.38 The *Local London Plan Towards 2026* (2023) is a three-year plan setting out the ambitions and work programme for economic development in the North East and South East London sub-region between 2023 and 2026. This plan identifies three shared ambitions to achieve (1) a better skilled workforce; (2) better digital and transport connectivity; and (3) higher ambitions for the future workforce. To achieve these ambitions the document outlines three key pillars:

1. **People:** Focus on employer-led skills development, employment growth, raising the aspirations of young people through career support, and digital inclusion, including business support.

2. **Place:** Focus on digital and transport and supporting the regeneration of communities by making the sub-region an attractive place to invest and building on links to the home counties.
3. **Sustainability:** Delivery of a sustainability agenda as a cross cutting theme. This includes delivery of skills on current and future green jobs and adopting a sectoral approach to support emerging sectors.

2.39 Through these themes, Local London aims to support the needs of key and emerging industry sectors including Construction, Health and Social Care, Media and Creative, Digital, Transport and Logistics and Food Processing.

South East London Waste Planning Technical Paper (2022), London Boroughs of Bexley, Bromley, Greenwich, Lewisham, Southwark and City of London Corporation

2.40 This document, prepared by the Southeast London Joint Waste Planning Group (SELJWPG), provides evidence that the London Boroughs of Bexley, Bromley, Greenwich, Lewisham and Southwark, as well as the City of London, can collectively meet the waste requirements set out in the London Plan 2021, and facilitate London becoming self-sufficient in managing its own waste sustainably by 2026.

2.41 The evidence in the technical paper demonstrates that the requirements for the SELJWPG to meet the following three *London Plan* (2021) policies:

- **Policy SI 7 Reducing Waste and Supporting the Circular Economy:** Places requirements on waste planning authorities, including that municipal waste recycling targets should meet or exceed 65% by 2030.
- **Policy SI 8 Waste Capacity and New Waste Self-sufficiency:** Sets requirements for boroughs in their local plans, including the identification of waste management facilities to provide the capacity to manage the apportioned tonnages of waste set out in the London Plan. This apportions London's entire requirement for waste management capacity at 2021 and 2041 across the London boroughs. The policy encourages boroughs to collaborate by pooling their apportionment requirements.
- **Policy SI 9 Safeguarded Waste Sites:** Expects existing waste sites to be safeguarded and retained in waste management use, but does provide criteria for considering loss of sites to other uses.

2.42 The results of this technical study demonstrate a surplus in capacity from operational facilities of 17% in 2021 and 14% in 2041. In addition, recently consented new facilities at Belvedere (LB Bexley) coming online by 2024 will bring the operational capacity to 158% of the London Plan waste apportionment requirements at 2041 in the SELJWPG area.

2.43 *Policy 112 Planning for Sustainable Waste Management* in the *Bromley Local Plan* (2019) is most relevant to this document in the context of the *SELJWPG Technical Paper*. This outlines the Council's role in supporting sustainable waste management by implementing the waste hierarchy in its approach to waste management; allocating strategic sites for waste management and safeguarding their use; working in collaboration with the SELJWPG to make optimum use of waste management capacity in the sub-region; and meeting the London Plan waste apportionment targets. Bromley's three strategic waste sites are as follows:

1. Waldo Road (Bromley): A Council-run reuse and recycling facility.
2. Churchfields Road (Beckenham): A Council-run reuse and recycling facility.
3. Cookham Road (Cray Valley/Swanley): A privately-owned green waste composting site now operated by Biogen (formerly Tamar).

Local Context

Bromley Local Plan (2019), London Borough of Bromley

2.44 LBB's current *Local Plan* sets out the future development strategy for the borough and provides a framework to guide planning decisions. This is currently undergoing a review and this study will feed into this process. The vision and objectives for the Local Plan have been developed from the borough's long-term Sustainable

Community Strategy Building a Better *Bromley 2020*. Particularly relevant thematic chapters are 'Business, Employment and the Local Economy' and 'Town Centres'.

- **Business, Employment and the Local Economy:** Bromley is a prosperous, thriving and skilled borough where businesses choose to locate. Objectives include:

  - The SIL and LSISs are retained and adapt successfully to the changing needs of modern industry and commerce.
  - Ensure there is an appropriate supply of commercial land and a range of flexible quality business premises across the Borough.
  - Ensure businesses contribute to a high quality, sustainable environment, through their premises development and locational decisions.
  - Support the appropriate provision of facilities to deliver high quality education and training.
  - Support the Strategic Outer London Development Centre (SOLDC) designation at Biggin Hill to enhance the area's employment and business opportunities, whilst having regard to the accessibility, heritage significance and environmental constraints.
  - Support the digital economy and the infrastructure required for it and modern business, such as high-speed fibre connections.

- **Town Centres:** Bromley Town Centre is a competitive Metropolitan Town Centre, complementing others in the region and attracting a wide range of visitors to its shopping, cinema, theatre and restaurant areas. Orpington functions as a strong and vibrant major centre, offering a good range of shopping, leisure and public amenities. These centres, together with the district, local and neighbourhood centres, provide accessible shops, services and facilities for residents and wider communities across the borough. Objectives are to:

  - Ensure the vitality of Bromley Town Centre, delivering the aims of the Area Action Plan.
  - Encourage a diverse offer of main town centre uses and complementary residential development.
  - Support the continued improvement of Orpington and district and local centres.
  - Encourage safe town centres and a prosperous evening economy.
  - Maintain and improve neighbourhood centres and parades across the Borough to ensure locally accessible facilities.

2.45 As part of the *Local Plan* (2019), Bromley's Spatial Strategy identifies locations for strategic development and in broad terms: the locations for growth, areas with significant opportunities for change and enhancement, and areas where protection and more constrained development is anticipated. It specifically mentions Bromley Town Centre as a focus for sustainable growth of retail, office, homes, leisure and cultural activities; Cray Business Corridor as the main industrial and business area within the borough, providing accommodation for a full range of businesses, and improving the offer for modern businesses; Biggin Hill Strategic Outer London Development Centre (SOLDC) as a cluster of businesses focused on aviation and high tech related industries; and, Crystal Palace SOLDC.

2.46 *The Local Plan* (2019) also highlights that "*it is important to consider how best to protect the Borough's employment land and office accommodation for future business needs, whilst encouraging improvements to the existing stock and quality of environment. This will require nurturing growth of the office market in the Borough's Town Centres and Office Clusters over the short, medium and long term given the highlighted anticipated demand for such floorspace*". To support this, the Local Plan proposes:

- One Strategic Industrial Location: Cray Business Corridor, incorporating Foots Cray Business Area and St Mary Cray.
- Three Strategic Employment Growth Locations: Bromley Town Centre, Cray Business Corridor and Biggin Hill Strategic Outer London Development Centre.
- Twelve LSISs: Oakfield Road (Penge), Franklin Industrial Centre (Penge), Lower Sydenham, Elmers End, Farwig Lane (Bromley North), Waldo Road (Bromley Town), Enterprise House (Bromley Common), The

Beechwood Centre (Bromley Common), Bencewell Business Park (Bromley Common), Kimberley Business Park (Leaves Green), Higham Hill Farm (Keston) and Biggin Hill.

2.47 The most relevant employment land policies are:

- **Policy 80, Strategic Economic Growth:** LBB has identified three strategic priority areas for economic growth: (a) Bromley Town Centre, (b) Cray Business Corridor and (c) Biggin Hill SOLDC.
- **Policy 81, Strategic Industrial Locations:** In the designated Foots Cray Business Area and St Mary Cray SIL, Class B1(b) and B1(c); Class B2; and Class B8 will be permitted and safeguarded.
- **Policy 82, Locally Significant Industrial Sites (LSIS):** In the designated LSISs, Class B1(a) (providing it is consistent with relevant Office and Town Centre policies); Class B1(b) and B1(c); and Class B8 are permitted, provided that the scale and design of the premises are congruous with adjoining premises and the LSIS as a whole.
- **Policy 83, Non-Designated Employment Land:** LBB will seek improvements to the quality and quantity of employment floorspace on sites containing existing industrial and related employment uses outside designated SILS and LSISs.
- **Policy 84, Business Improvement Areas (BIA):** LBB will seek to manage and improve the supply of high quality office floorspace in Bromley Town Centre through designating the following as BIA: (a) London Road, (b) Bromley North, and (c) Bromley South. Redevelopment proposals resulting in the loss of Class B1(a) floorspace or which compromise the primary function of the BIA will not be permitted.
- **Policy 85, Office Clusters:** LBB will work to retain and manage an adequate stock of good quality office floorspace in the borough through safeguarding the following as Office Clusters: (a) Crayfield Business Park, Cray Business Corridor, (b) Knoll Rise, Orpington Town Centre, and (c) Masons Hill, Bromley Town.
- **Policy 86, Office Uses Outside Town Centres and Office Clusters:** Proposals for new office development will be expected to be located within designated Town Centres and Office Clusters. On sites outside of this, proposals for Class B1(a) will be permitted, provided that they are consistent with Town Centres Policies.
- **Policy 90, Bromley Town Centre Opportunity Area:** LBB will prepare an Opportunity Area Planning Framework for Bromley Town Centre to deliver a minimum of 2,500 homes and an indicative 2,000 jobs and maximise its contribution to the vision and objectives of the Local Plan.
- **Policy 92, Metropolitan & Major Town Centres:** LBB will require development within Bromley Town Centre to contribute positively to the town's status as an Opportunity Area and its role as a Metropolitan Centre, and development in Orpington Town Centre should provide a range of uses to contribute to its role as a Major Centre.
- **Policy 93, Bromley Shopping Centre (The Glades):** Within the main shopping centre, LBB will only permit a change of use away from retail (Class A1) provided that the centre's primary retail function is not adversely affected.
- **Policy 94, District Centres:** Within Beckenham, Crystal Palace, Penge, Petts Wood and West Wickham District Centres permitted change of use may be considered by LBB for primary and secondary frontages under proposals meeting specific criteria for each.
- **Policy 95, Local Centres:** Changes of use may be permitted for shopping frontages of Local Centres under proposals meeting specific criteria.
- **Policy 97:** Proposals within Town Centres for the conversion of upper floors of shops or commercial premises to residential, community, office or leisure uses will be permitted under certain conditions. Proposals for the loss of office space on upper floors will need to demonstrate that it is not feasible and/or viable to refurbish, renew or modernise to meet the current requirements of occupiers.
- **Policy 103/104/105/106/107/108, Biggin Hill Strategic Outer London Development Centre:** LBB will support the Biggin Hill SOLDC including the provision of associated business infrastructure amenities to support it become an important sub-regional hub for aviation and related high-tech industry and to achieve sustainable economic growth whilst minimising adverse impacts on the environment and the amenity of surrounding communities.
- **Policy 111, Crystal Palace SOLDC:** LBB to expect development proposals for the Crystal Palace SOLDC to maintain, enhance and support the unique existing strategic cultural, sports, tourism and leisure functions of the Crystal Palace Park.

- **Policy 114, New Waste Management Facilities and Extensions and Alterations to Existing Sites:** New waste management facilities and extensions and/or alternations to existing waste management facilities must demonstrate that they will not undermine the local waste planning strategy and help the borough move up the waste hierarchy.

2.48 LBB has also recently adopted the *Bromley Urban Design Guide* (2023) which, of relevance to this document, provides guidance on mixed-use and non-residential development. In relation to the former it sets out that mixed-use development should seek to *"…achieve diversity and choice through a mix of compatible uses and activities that work together to create and support viable places".* Proposals should:

- Consider the appropriateness of the setting, floorspace requirements, patterns of usage and compatibility of uses.
- Avoid the creation of large areas of continuous/unrelieved single uses.
- Provide active ground floor uses (shops, cafes, restaurants and bars) as well as community uses, studios and workshops to activate the public realm.
- Consider multiple layers of mixed uses which involve different people using buildings/spaces at different times of the day/evening.
- Consider how the different uses and activities will be serviced and conflicts managed.
- Consider the amount and range of spaces required including the building structure and the importance of flexibility for futureproofing.

2.49 In relation to non-residential development is states that development should *"…make a positive contribution to the local economy and the quality of the built environment*". Proposals should:

- Provide a functional and efficient layout proportionate to the size of the plot and that has a positive relationship with the street/public realm.
- Establish a clear movement hierarchy and circulation strategy to reduce pedestrian/vehicle conflict.
- Ensure that height, scale and massing is appropriate for the setting and surrounding context.
- Seek to improve the urban environment with an appropriate architectural language and well-designed elevations, facades and signage.
- Maximise opportunities for additional landscaping and urban greening.
- Ensure buildings and spaces are futureproofed with an ability to adapt.

Bromley Economic Development Strategy (2021), London Borough of Bromley

2.50 LBB's *Economic Development Strategy* (2021) sets out the aspirations and priority areas for Bromley to achieve its desired levels of growth between 2021 to 2031. The overall economic aspiration for Bromley is to be: "*a prosperous borough where businesses thrive, new businesses aspire to locate, and residents experience high levels of employability*". The strategy's seven aspirations are listed below:

1. Bromley's residents have access to the right opportunities for skills and education that will ensure healthy employment in the future.
2. Bromley's businesses have access to the right employment spaces in the right places with local business clusters which encourage enterprise and facilitate sustained growth.
3. Bromley is an exciting, attractive, healthy, sustainable and welcoming place where businesses thrive, people aspire to live and visit, and new enterprises seek to invest.
4. Bromley's High Streets are thriving places, working to be places where people want to visit, live and work.
5. Bromley's residents and business community are well connected through diverse physical and digital infrastructure networks which underpins mobility across the whole borough.
6. Bromley's cultural and tourism industries continue to grow and diversify, and Bromley's unique historical features are promoted for the world to see.
7. Bromley's green economy will help to sustain and advance economic, environmental and social wellbeing.

2.51 Specific objectives focus on the protection of existing employment space, facilitating additional employment space, and ensuring that employment is prioritised as part of the development of Bromley's *Local Plan* (2019) policies.

Neighbouring Boroughs' Employment Land Requirements

2.52 A number of Bromley's neighbouring boroughs have updated their Local Plans since the last iteration of the *Bromley Employment Land Study* (2010). Key messages around employment requirements are identified below to provide an overview of wider demand and need:

- **Bexley Local Plan (2023):** The *Bexley Employment Land Review* (2021) sets out that the 'Past Completion' scenario should be considered a minimum requirement for the borough's future employment space to the period 2036 – this translates to -2,250 sqm B1a office E, 44,460 sqm B2 industrial and 61,810 sqm B8 distribution.
- **Greenwich Local Plan (2014):** The *Greenwich Employment Land Review* (2012) states that the employment land requirement for Greenwich up to 2028 is between 26,000 sqm and 29,000 sqm of office floorspace, and a net decrease in demand for industrial land of around -45 ha and -48 ha in the period 2012 to 2028.
- **Lewisham Local Plan (2011):** The *Lewisham Employment Land Study* (2019) provides an update of the employment land supply and demand in the borough, with consideration of the future requirements over the plan period. It recommends that the borough plans for a net addition of 10,000 sqm of office stock between 2018-2033 or 15,000 sqm over the period 2018-2038. It also recommends that there is no further net loss of industrial land. The *Lewisham Industrial Employment Land Study* (2023) emphasises this, highlighting that there is a risk of further losses and that further designations are required. This evidence base underpins a new draft Local Plan which was submitted for Examination in November 2023.
- **Southwark Local Plan (2022):** The *Southwark Employment Land Study* (2016) sets out the employment land need for the borough between 2015 and 2031. This states that Southwark requires 460,000 sqm net additional office floorspace, and industrial land is forecast to decline by 1 ha per annum.
- **Croydon Local Plan (2018):** The *Croydon Employment Land Review Update* (2020) provides updated evidence on employment land and premises needs in Croydon borough to assist the partial review of the Croydon *Local Plan* (2018). This provides floorspace figures that suggest based on current growth conditions from 2018 up to 2039, the most likely demand for employment space is 30,500 sqm for B1a office, -8,500 sqm for B2 general industrial and 78,000-85,500 sqm for B8 distribution.
- **Lambeth Local Plan (2021):** The *Lambeth Employment Land Review Update* (2013) indicates floorspace demand up to 2026 based on three scenarios: Baseline, Higher Growth and Lower Growth. This indicates that B1a office floorspace demand will range from 82,700 sqm to 268,500 sqm and B1c and B2 floorspace will decline between 12,600 sqm and 22,900 sqm up to 2026. Demand for B8 floorspace is forecast to increase between 48,1000 sqm and 79,400 sqm except under the Lower Growth Scenario in which there is a forecast decline of 9,300 sqm.
- **Tandridge Emerging Local Plan (2023):** The *Tandridge Economic Needs Assessment Update (ENA)* (2017) provides an estimate of the district's future need for employment land between 2013-2033 and is used to guide the production of the Tandridge Local Plan. This identifies the following demand as a minimum for employment space: 27,000 sqm of B1a/b office, 8,000 sqm of B1c/B2 industrial and 23,000 sqm of B8 warehouse/distribution.
- **Sevenoaks Local Plan:** The *Sevenoaks and Tunbridge Wells Economic Needs Study* (2016) provides an assessment of the need for employment land over the emerging plan period to 2035 for Sevenoaks and Tunbridge Wells Councils. Forecast for the period 2015-2035, Sevenoaks District is expected to require 7.2 ha B1a/b, 1.1 ha B1c/B2 and 3.3 ha B8. This underpins the draft Sevenoaks Local Plan which is currently at Reg 18 Stage.
- **Dartford Local Plan:** The *Dartford Employment Needs Review* (2020) does not contain any figures on the employment land need for the borough but rather provides a broad indication about the types and locations of future commercial premises. This flows through to the new Local Plan which current at Main Modifications stage.

3. Demand Context: Exploring Demand Signals for Employment Land

Chapter Summary

This chapter sets out socio economic and commercial market trends to explore local demand signals as well as current and future drivers of economic growth. This information has been used to inform the demand and need scenarios set out in the next chapter. Key messages include:

- Bromley's population has increased by **+6%** over the last ten years to **330,000** people. This is a slightly lower growth rate than Outer South London and London more broadly. The borough is forecast to accommodate a further **+32,000** residents over the next two decades.
- Bromley has a high proportion of residents either in employment or self employment (**80%**) compared to most of its neighbouring boroughs as well as Outer South London and London. Bromley also has a higher proportion of residents with qualifications to degree level or above (**62%**) and a lower proportion of residents with no qualifications (**3%**) than most of its neighbours.
- Bromley's occupational profile reflects the level of qualifications held by residents, with a higher proportion working in managerial and professional roles than many of its neighbours as well as Outer South London and London. This is also reflected in average annual resident earnings, which are **£37.7k** compared to **£34.5k** in Outer South London and **£34.0k** across London.
- Bromley has a larger economy than several of its neighbours with around **15,100** businesses and **109,000** jobs. This is mainly due to high levels of employment in sectors such as Health, Retail, Business Administration & Support Services and Education.
- Bromley's employment base has not increased over the last decade of available data though the picture is mixed across the borough with employment growth in the borough s industrial areas, and employment losses in traditional town centre locations.
- Bromley's employment mix is dominated by Health (**17,000** jobs), Retail (**12,000** jobs), Business Administration & Support Services (**12,000** jobs), Education (**11,000** jobs), Professional, Scientific & Technical (**9,000** jobs) and Accommodation & Food Services (**8,000** jobs). Notable economic specialisms include Construction, Health, Retail, Arts, Entertainment & Recreation and Financial & Insurance.
- Over the past five years (2016 2021) the sectors that have declined in size in Bromley include Manufacturing (**36%** jobs), Property (**22%** jobs), Professional, Scientific & Technical (**18%** jobs) and Public Administration & Defence (**17%** jobs). Conversely, the sectors with the strongest employment growth include Business Administration & Support Services (**+20%** jobs), Motor Trades (**+17%** jobs), Arts, Entertainment, Recreation & Other Services (**+14%** jobs) and Health (**+13%** jobs).
- Bromley's office market is mid sized and larger than several neighbouring boroughs, with **393** properties across **3.5** million sqft of office floorspace.
- Office rents are lower in Bromley (**£23** psf) than several neighbouring boroughs, likely linking to the size and quality of the existing units in Bromley and suggesting that demand for office properties may be stronger elsewhere. Relatively low rental growth and low vacancy rates (**c.4%**) in Bromley suggest that demand has remained fairly static over time.
- Bromley's office take up has shown highest demand for units below 10,000 sqft which is similar to the Outer South London profile, reflecting Bromley's role as a local office market.
- Bromley's industrial market is mid sized and supports a range of manufacturing, wholesale and motor trades businesses, with an aviation specialism at Biggin Hill.
- Bromley's industrial market is larger than several neighbouring boroughs and comprises **250** properties across **4.2** million sqft of industrial floorspace.
- Bromley's average industrial rents are relatively low (**£13** psf) compared to neighbouring boroughs, and in recent years rental values in other locations have shown stronger growth than in Bromley.
- Industrial vacancy rates in Bromley are in line with many of its neighbours at c**.5%** this which may limit choice for potential occupiers seeking new or larger space within the borough.
- Bromley has seen relatively low levels of industrial leasing activity (**169** deals) relative to similar sized markets in Croydon, Southwark and Greenwich.

Socio-Economic Conditions

National Picture

3.1 The population of England and Wales has increased by **+6%** since 2011 to around **59.6m** according to the most recent Census[4]. The places that have seen the greatest rises are the South East (+643k), London (+625k) and East of England (+488k). Projections indicate that the population could reach **71m** by 2045 with growth expected across the whole country[5].

3.2 Since 2011 the population has continued to age with around **18.6%** of England's residents now 65 or older versus **16.5%** at the previous Census. This is expected to continue further with projections indicating that this will rise to **24%** by 2043[6].

3.3 In line with this, the United Kingdom's (UK) economy has grown significantly over the last decade as it emerged from the Global Financial Crisis in 2008. Gross Domestic Product (GDP) has increased by **+16%** since 2011 to **$3.13tn**[7] which has been accompanied by a continued fall in the unemployment rate which now sits at **3.7%** - one of the lowest rates in history[8].

3.4 The broad economic sectors that have grown the most during this period are (see Figure 4)[9]:

- Health which has 275,000 more jobs than in 2016 (+7%).
- Professional, Scientific & Technical which has 151,000 more jobs than in 2016 (+6%).
- Public Administration and Defence which has 146,000 more jobs than in 2016 (+12%).
- Construction which has 141,000 more jobs than in 2016 (+10%)
- Transport & Storage which has 138,000 more jobs than in 2016 (+10%).
- Information & Communications which has 117,000 more jobs than in 2016 (+9%).

3.5 These sectors have been boosted by a wide range of factors ranging from the country's growing and ageing population to the acceleration of e-commerce and automation following the COVID-19 pandemic.

3.6 In contrast the broad economic sectors that have declined the most during this period are:

- Wholesale which has -103,000 fewer jobs than in 2016 (-9%).
- Manufacturing which has -65,000 fewer jobs than in 2016 (-9%).
- Arts, Entertainment and Recreation which has -53,000 fewer jobs than in 2016 (-4%).
- Motor Trades which has -16,000 fewer jobs than in 2016 (-3%).

3.7 This is similarly influenced by different factors ranging from the decline in bricks and mortar retail to the decision to leave the European Union.

3.8 Since 2020, however, the national economy has stalled due to three broad factors:

- The impact of the COVID-19 pandemic and its associated public health restrictions on business activity and consumer purchasing.
- The impact of the decision to leave the European Union (EU) on both trading and migration patterns.
- The impact of the conflict between Russia and Ukraine on commodity prices (i.e. energy, food and other supplies).

[4] ONS Census, 2021.
[5] ONS Population Projections, 2022.
[6] Ibid.
[7] World Bank National Accounts, 2021.
[8] ONS Employment in the UK, 2023.
[9] The Office for National Statistics (ONS) changed their methodology for collecting employment data in 2015 so it is not possible to look at trends back to 2011 without manipulating the datasets using broad assumptions.

3.9 These macro-economic forces have pushed the country towards a recession characterised by falling GDP and rising inflation as reflected in the Consumer Price Index. The Bank of England have responded by increasing the base interest rate to **4.25%** to slow inflation - this is expected to increase further in 2023 as inflation continues apace followed by reductions in 2024 and 2025. Moving forward the Office for Budget Responsibility (OBR) project that real GDP will fall by **-0.23%** in 2023 before returning positive in 2024 and reaching **+2.5%** in 2025[10].

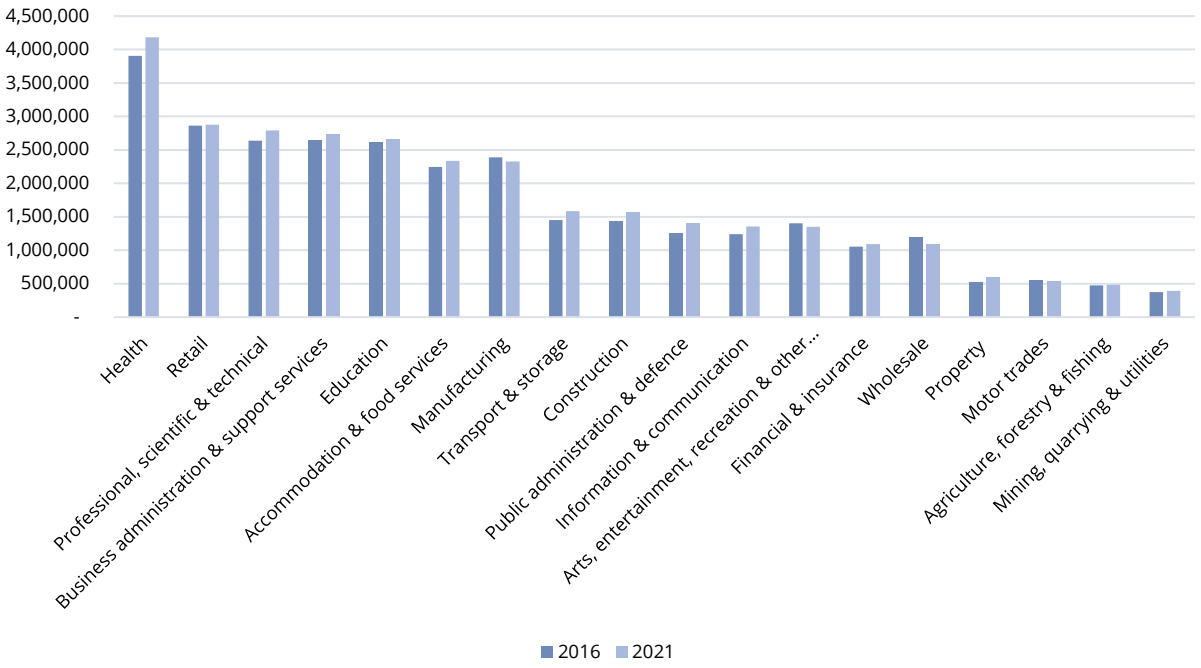


Figure 4: UK Employment by Broad Sector (2016 and 2021)
Source: ONS. Business Register and Employment Survey (2021)

Bromley's Population

3.10 Bromley is characterised by a large, diverse and growing resident population. The latest Census indicates that there are around **330,000** people living in the borough which is **+6%** more than in 2011 (see Table 1). This means Bromley has experienced a similar proportional increase to Bexley (+6%) but a lower increase than Greenwich (+13%), Sutton (+10%), Croydon (+7%) and Merton (+7%), as well as Outer South London[11] (+7%) and London (+7%) more broadly.

3.11 Bromley's population is concentrated in its more urban areas which are in the north and centre of the borough. As Figure 5 shows, the highest population densities are in Penge, Beckenham, Bromley, Mottingham, Hayes, Petts Wood, Orpington and Biggin Hill. Many of these areas have also seen the largest population increases since 2011 (see Figure 6), reflecting, in part, housing development that has come forward during this period, including:

- Maybrey Works, Lower Sydenham (159 homes).
- Langley Court, Beckenham (280 homes).
- Apple Yard, Anerley (216 homes).
- St Mark's Square, Bromley (200 homes).
- Trinity Village, Bromley (536 homes).

[10] Office for Budget Responsibility, Economic and Fiscal Outlook, March 2023.
[11] London Boroughs of Bexley, Bromley, Greenwich, Croydon, Sutton, Merton, Kingston-Upon-Thames and Merton-Upon-Thames.

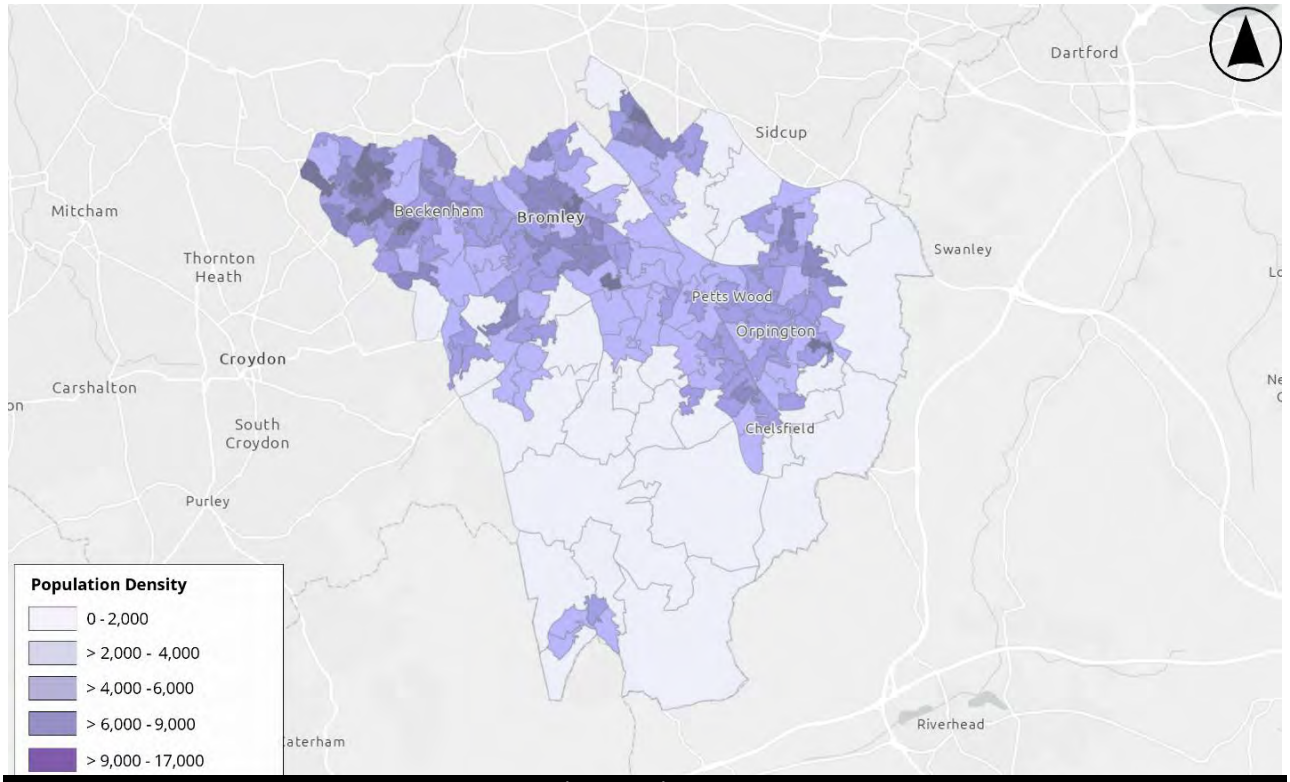


Figure 5: Bromley Population Density (2021)

Source: ONS. Census, 2021

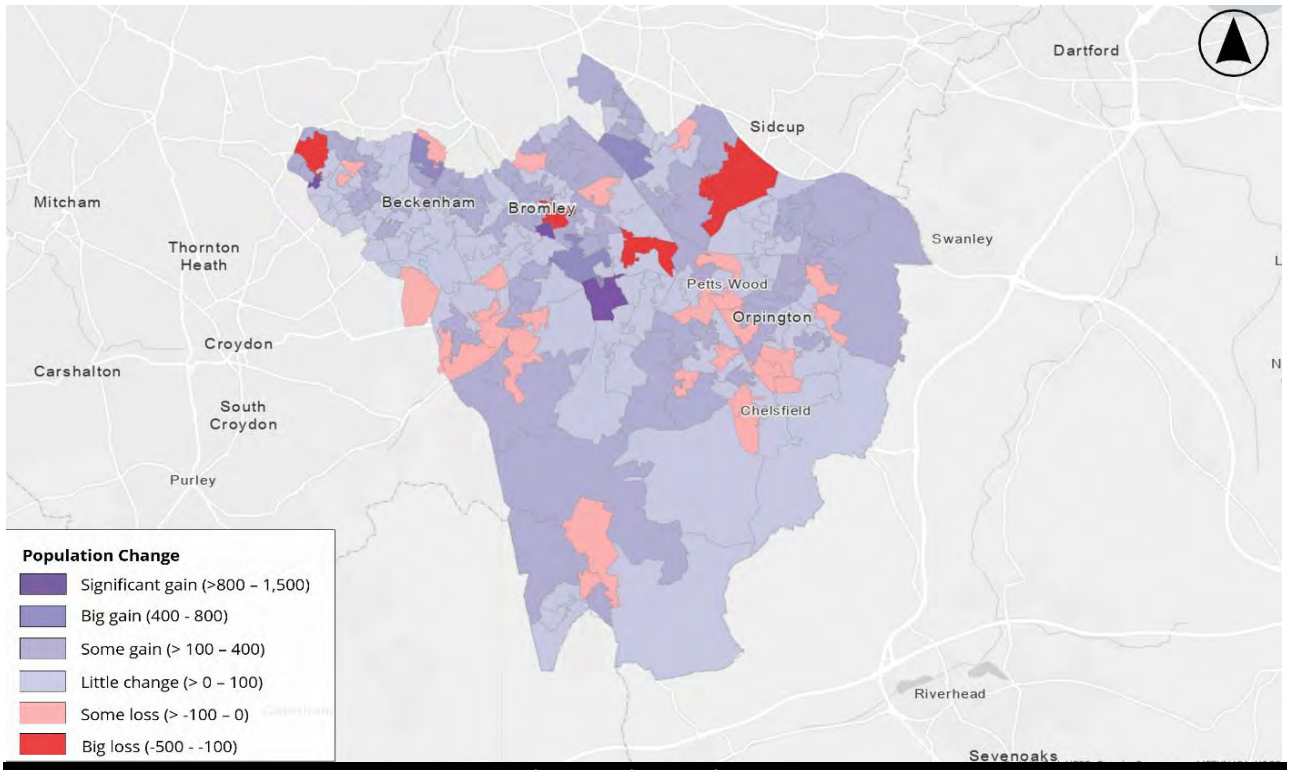


Figure 6: Bromley Population Change (2011 2021)

Source: ONS. Census, 2011; Census, 2021

3.12 Areas to the south and far east of the borough have much lower population densities as they are classified as part of London's Greenbelt. This limits the level of development that can come forward and includes places such as Downe, Farnborough, Keston and Hockenden Wood.

3.13 The age profile of the population reflects Bromley's Outer London location – as shown in Figure 7, the borough has a lower proportion of working-age residents (aged 16-64) and a higher proportion of older age groups versus London more broadly. Notably, Bromley has a larger proportion of every age group from age **50-54 years** upwards versus the London average. Its largest age cohort is aged **40-44**, compared to London's largest group aged 30-34 years.

Table 1: Population Growth by Borough

	LB Bexley	LB Bromley	LB Croydon	LB Greenwich	LB Lambeth	LB Lewisham	LB Southwark	Dartford	Sevenoaks	Tandridge	Outer South London	London
2011	232,774	310,554	364,815	255,483	303,086	275,885	288,283	97,365	114,893	82,998	1,896,213	8,204,407
2021	246,480	329,993	390,721	289,067	317,652	300,550	307,637	116,749	120,516	87,874	2,044,439	8,799,729
Total Growth	+13,706	+19,439	+25,906	+33,584	+14,566	+24,665	+19,354	+19,384	+5,623	+4,876	148,226	+595,322
% Growth	+6%	+6%	+7%	+13%	+5%	+9%	+7%	+20%	+5%	+6%	8%	+7%

Table 2: Projected Population Change by Borough (2018-2043)

	LB Bexley	LB Bromley	LB Croydon	LB Greenwich	LB Lambeth	LB Lewisham	LB Southwark	Dartford	Sevenoaks	Tandridge	Outer South London	London
2018	247,258	331,096	385,346	286,186	325,917	303,536	317,256	109,709	120,293	87,496	2,032,971	8,908,081
2043	273,898	364,054	408,355	335,789	354,962	343,438	363,487	141,501	130,791	94,564	2,211,729	9,814,032
Change	**+26,640**	**+32,958**	**+23,009**	**+49,603**	**+29,045**	**+39,902**	**+46,231**	**+31,792**	**+10,498**	**+7,068**	**+178,758**	**+905,951**
% Change	**+11%**	**+10%**	**+6%**	**+17%**	**+9%**	**+13%**	**+15%**	**+29%**	**+9%**	**+8%**	**+9%**	**+10%**

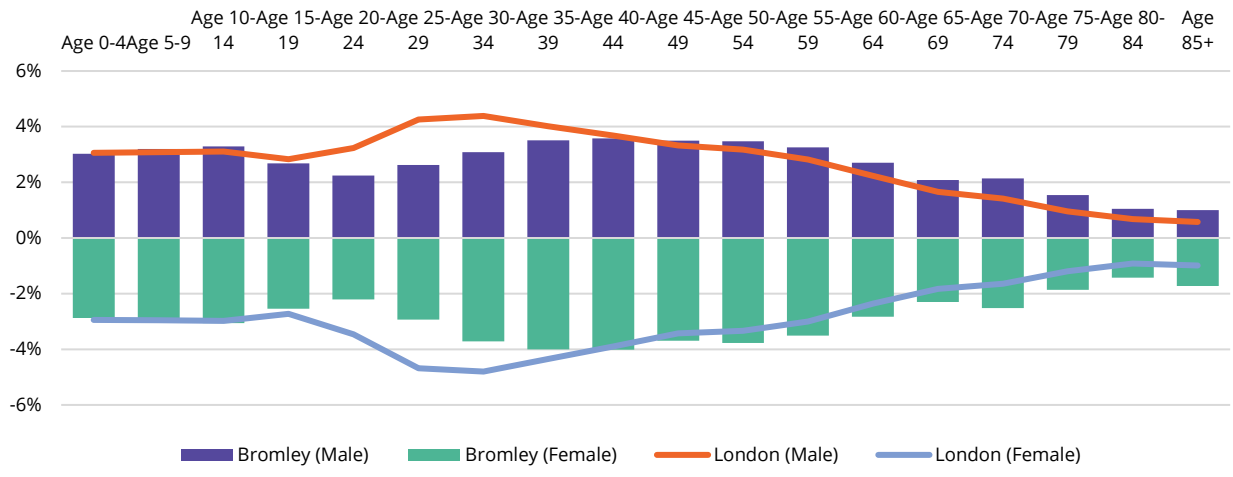


Figure 7: Bromley Age Profile versus London (2021)
Source: ONS. Census, 2021

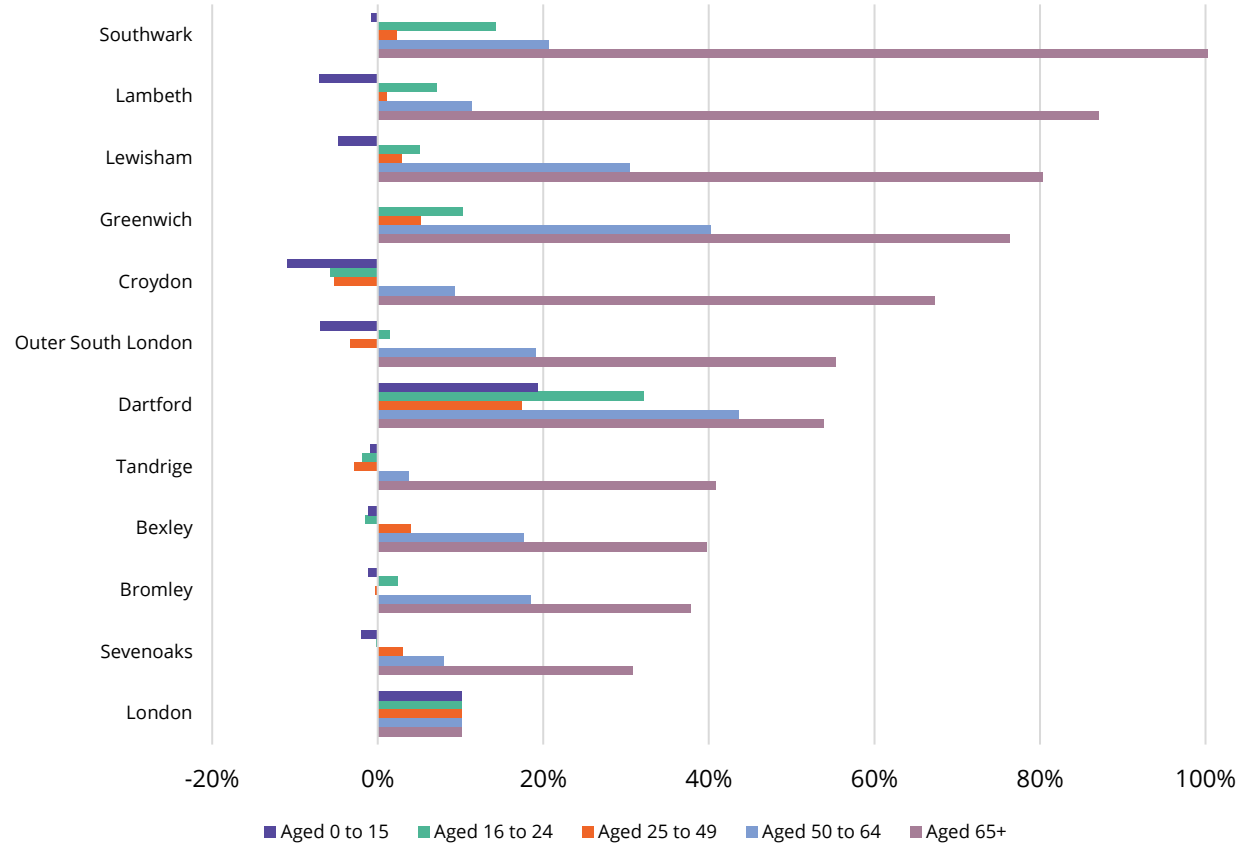


Figure 8: Projected Population Growth By Age Group (2018 2043)
Source: ONS Population Projections, 2021

3.14 Moving forward, projections indicate that Bromley's population will increase by over **+32,000** over the next two decades which represents a **+10%** increase compared to the baseline (see Table 2). This is lower than many of the borough's neighbours, notably Greenwich (+49,000), Southwark (+46,000) and Lewisham (+40,000), but is proportionally higher than several others. Projections indicate that Bromley's 65+ age group is forecast to experience the greatest proportional increase over this period (**+38%**) with the working age population expected to increase by only **+6%** (see Figure 8).

Bromley's Labour Market

3.15 Bromley has a high employment rate with **80%** of working-age residents classified as employees or self-employed in 2021. This is higher than all neighbouring boroughs except Lambeth and Tandridge, and higher than Outer South London more broadly at 77% (see Figure 9). Current figures are 7 percentage points higher than a decade earlier, representing positive progress in Bromley's economic profile (see Figure 10).

3.16 This high employment rate may link to the fact that the borough has a high proportion of residents with higher level qualifications – 62% of residents are qualified to NVQ Level 4 (equivalent to degree-level) and above which is higher than several neighbouring boroughs including Bexley, Croydon, Dartford, Sevenoaks and Tandridge, though it is lower than the Outer South London and London averages (64% and 66% respectively).

3.17 Bromley's occupational profile also reflects its qualifications profile with a higher proportion of residents working in Manager, Director and Senior roles (15%) compared to many of its neighbours and the Outer South London average (12%) (see Table 3). Professional occupations account for the largest occupational group for Bromley's residents (35%) which again is higher than most neighbouring boroughs and above the Outer South London average (32%). This translates to a median gross annual salary of £37,749 for Bromley's

residents versus £37,566 for Lambeth, £35,165 for Tandridge and £34,509 for Greenwich which are also all above the Outer South London average at £34,472 (see Table 4).

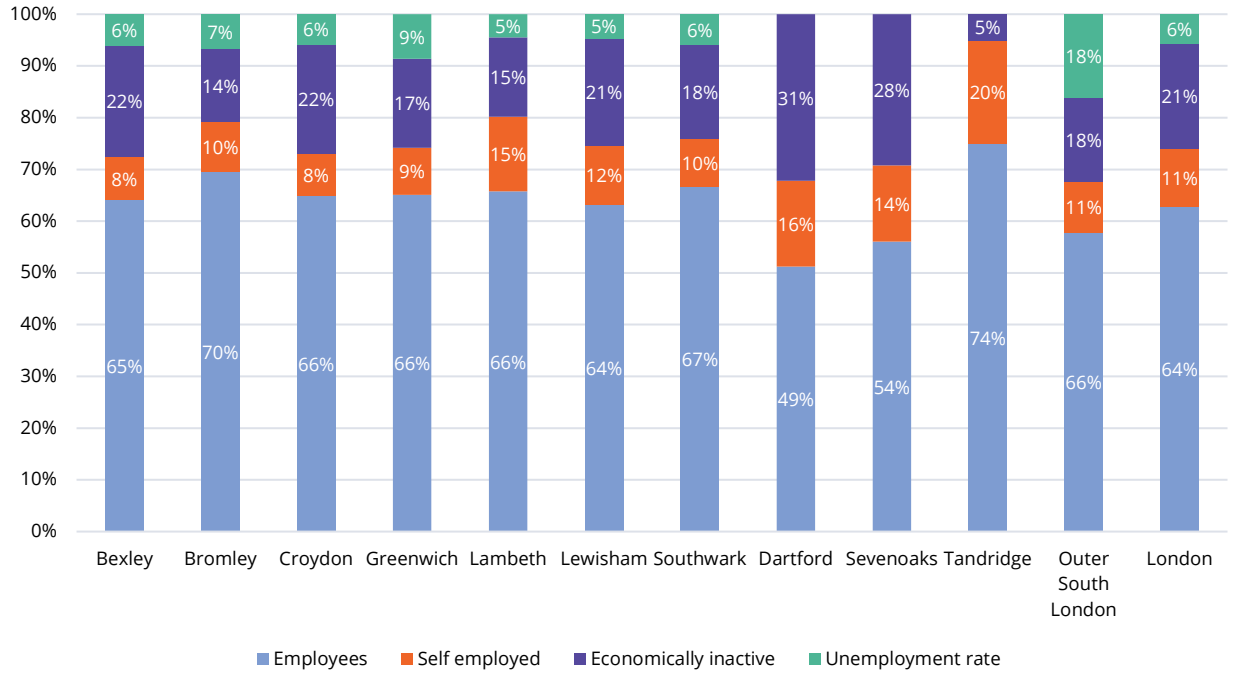


Figure 9: Economic Activity by Borough (2021)
Source: ONS. Annual Population Survey, 2021

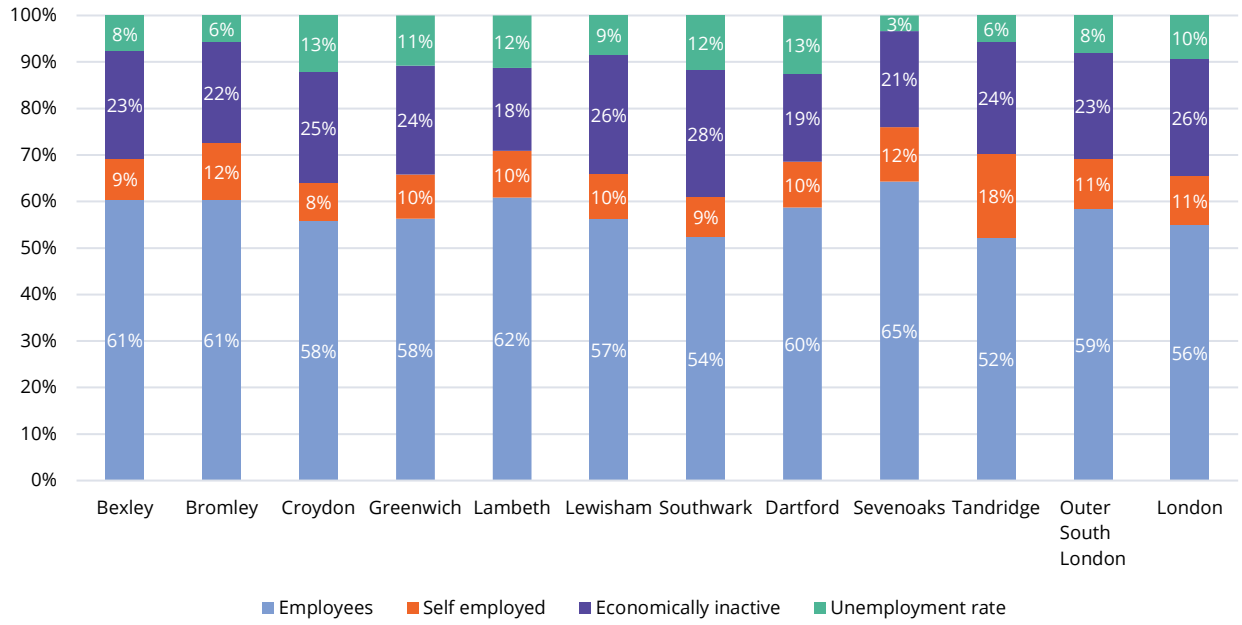


Figure 10: Economic Activity by Borough (2011)
Source: ONS. Annual Population Survey, 2011

*The unemployment rate in Dartford, Sevenoaks and Tandridge are excluded from the latest figures as the group sample size is too small.

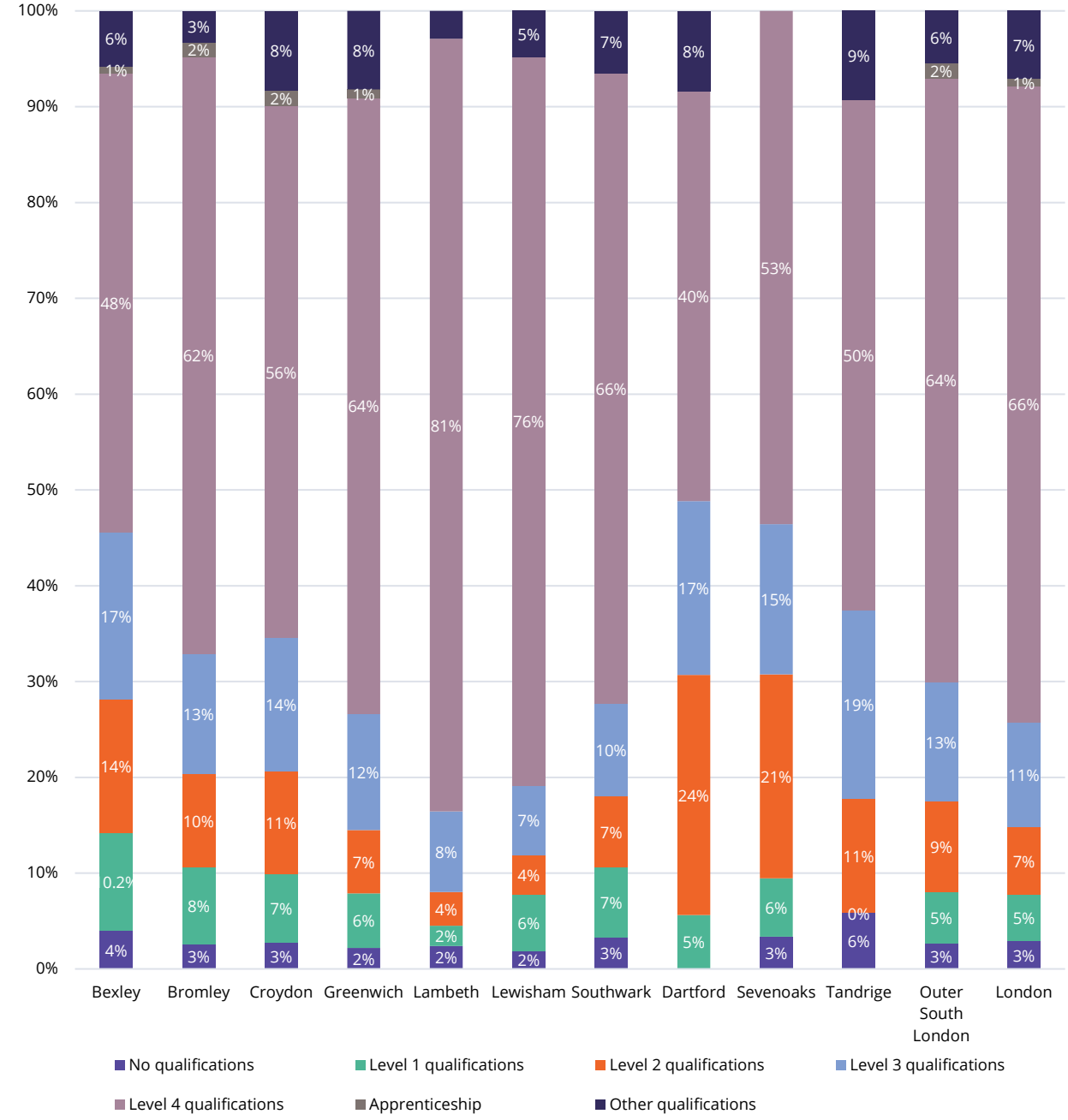


Figure 11: Qualification Levels by Borough (2021)
Source ONS. Annual Population Survey, 2021

Table 3: Occupational Profile by Borough (2021)

	Managers, directors and senior officials	Professional occupations	Associate professional occupations	Administrative and secretarial occupations	Skilled trades occupations	Caring, leisure and other service	Sales and customer service occupations	Process, plant and machine operatives	Elementary occupations
LB Bexley	11%	27%	11%	13%	8%	9%	4%	6%	11%
LB Bromley	15%	35%	15%	14%	7%	5%	5%	1%	4%
LB Croydon	10%	28%	17%	13%	5%	6%	6%	7%	7%
LB Greenwich	9%	32%	13%	11%	6%	9%	4%	4%	13%
LB Lambeth	17%	37%	26%	7%	2%	3%	0%	3%	3%
LB Lewisham	11%	35%	20%	10%	2%	5%	5%	4%	7%
LB Southwark	12%	30%	17%	12%	3%	10%	5%	2%	9%
Dartford	0%	17%	21%	19%	18%	10%	0%	0%	0%
Sevenoaks	21%	24%	18%	5%	10%	10%	4%	0%	4%
Tandridge	13%	31%	14%	8%	10%	12%	4%	0%	6%
Outer South London	12%	32%	17%	11%	5%	7%	5%	4%	7%
London	13%	34%	16%	10%	5%	6%	5%	3%	7%

Source: *ONS. Annual Population Survey, 2021*

Table 4: Annual Average Gross Pay by Borough (2012-2022)

	Median Pay	Change in Median Pay 2012 2022 (%)	Mean Pay	Change in Median Pay 2012 2022 (%)
LB Bexley	£33,829	+25%	£41,164	+35%
LB Bromley	£37,749	+23%	£48,929	+17%
LB Croydon	£34,226	+30%	£38,172	+26%
LB Greenwich	£34,509	+31%	£40,999	+22%
LB Lambeth	£37,566	+25%	£48,060	+39%
LB Lewisham	£32,579	+24%	£38,066	+21%
LB Southwark	£34,583	+22%	£45,685	+27%
Dartford	£32,204	+30%	£36,047	+28%
Sevenoaks	£25,659	+12%	£36,430	-12%
Tandridge	£35,165	+35%	£46,788	+26%
Outer South London	£34,472	+18%	£44,141	+17%
London	£33,970	+21%	£44,190	+19%

Source: ASHE. Annual Pay Gross, 2022

Bromley's Economy

3.18 Bromley has **c.15,100** businesses that support **c.109,000** jobs – this is fewer jobs than some neighbours, including Southwark (237,000 jobs), Lambeth (145,000 jobs) and Croydon (120,000 jobs), but more than others including Bexley (76,000), Greenwich (88,000), Lewisham (69,000), Sevenoaks (51,000), Dartford (66,000) and Tandridge (33,000) (see Table 5).

3.19 Despite this large employment base the borough does, however, have a comparatively low job density - there are **0.60** jobs per resident, which is a lower than neighbouring boroughs like Southwark (1.32), Dartford

(0.99), Sevenoaks (0.88), Tandridge (0.75) and Lambeth (0.73) (see Figure 12). These trends in part reflect that many of Bromley's residents work elsewhere in London.

3.20 Unlike some neighbouring boroughs, Bromley's business and employment base has not increased in size over the past decade of available data at **+0%** growth in business numbers, and **+0%** growth in employment count. Boroughs like Bexley (+1%), Croydon (+3%), Lambeth (3%), Dartford (+3%), Southwark (+7%) and Greenwich (+9%) have seen higher levels of employment growth over this period with only Sevenoaks (-4%) and Tandridge (-3%) seeing a contraction (see Table 5).

3.21 In terms of Bromley's broad sector mix (see Table 6), the borough's largest industries in terms of employment are:

- Health: **17,000 jobs** (+13% higher than in 2016).
    - Notable employers include the Princess Royal University Hospital, the King's College Hospital NHS Foundation Trust, NHS South East London Clinical Commissioning Group, HCA Healthcare UK and Bromley Healthcare (Various).
- Retail: **12,000 jobs** (-8% lower than in 2016).
    - Notable employers include Primark, Marks & Spencer, Tesco, Sainsbury's, Next, Waitrose, Homebase, Virgin Active, Odeon, Poundland, Vue Entertainment and Decathlon.
- Business Administration & Support Services: **12,000 jobs** (+20% higher than in 2016).
    - Notable employers include Absolute Applications, Berry Recruitment, Chandler's Limited, CPL, Evo, Gattaca, Mitie, Hanson Regan and Sumo Creative.
- Education: **11,000 jobs** (+10% higher than in 2016).
    - Notable employers include London South East Colleges, Baston House School, Little Elms Daycare Nursery, Skylark School of Dance, L3 Training Ltd, GB Bromley School Limited and Apollo Learning Ltd
- Professional, Scientific & Technical: **9,000 jobs** (-18% lower than in 2016).
    - Notable employers include CSM Sport and Entertainment, Splash Damage, JLT Management Services, PRA Group Ltd, BS&T Production and Design Ltd, Judge & Priestly LLP, Ovation Data and RSM UK Management Ltd.
- Accommodation & Food Services: **8,000 jobs** (no change since 2016).
    - Notable employers include Hallmark Care Homes Developments Ltd, Preto Limited, McDonald's, Burger King, Wetherspoons, KFC, Nando's and Domino's.
- Construction: **7,000 jobs** (-13% lower than in 2016).

3.22 Three of these are specialised versus the national economy. There are:

- **1.3x** as many jobs in Construction than represented in the national economy.
- **1.2x** as many jobs in Health than represented in the national economy.
- **1.2x** as many jobs in Retail than represented in the national economy.

3.23 Bromley is also home to other specialised sectors with smaller employment bases. In Bromley there are:

- **1.7x** as many jobs in Arts, Entertainment, Recreation and Other Services than represented in the national economy.
- **1.5x** as many jobs in Financial and Insurance than represented in the national economy.

3.24 In terms of trajectory, sectors that have experienced declines in employment include Manufacturing (**-36%** jobs), Property (**-22%** jobs), Professional, Scientific & Technical (**-18%** jobs) and Public Administration & Defence (**-17%** jobs). With the exception of Manufacturing, these trends contrast to growth in these sectors at the national level (see Figure 4). In Bromley's context these sectoral shifts could indicate longer term changes to the composition of the borough's economy.

3.25 Other sector that have expanded include Business Administration & Support Services (**+20%** jobs), Motor Trades (**+17%** jobs), Arts, Entertainment, Recreation & Other Services (**+14%** jobs) and Health (**+13%** jobs). Growth in Business Administration & Support Services and Health reflects national sectoral trends, whilst growth in Bromley's employment in Motor Trades and Arts, Entertainment, Recreation & Other Services may reflect sector specialisms developing in the local economy.

Table 5: Employment by Borough (2016–2021)

	2016 Total Employment	2021 Total Employment	% Change (2016 2021)
LB Bexley	75,000	76,000	+1%
LB Bromley	109,000	109,000	+0%
LB Croydon	120,000	124,000	+3%
LB Greenwich	81,000	88,000	+9%
LB Lambeth	145,000	150,000	+3%
LB Lewisham	68,000	69,000	+1%
LB Southwark	237,000	254,000	+7%
Dartford	64,000	66,000	+3%
Sevenoaks	53,000	51,000	-4%
Tandridge	34,000	33,000	-3%
Outer South London	706,000	715,000	1%
London	5,147,000	5,447,000	+6%

Source: ONS Business Register and Employment Survey, 2021

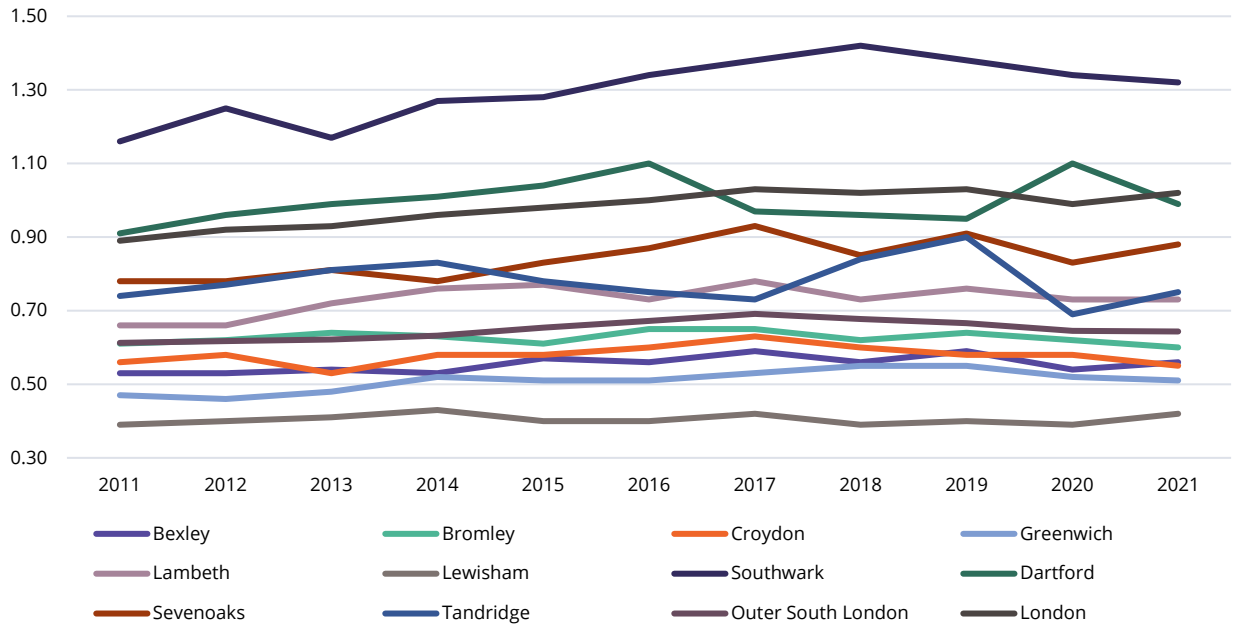


Figure 12: Job Density by Borough (2011 2021)
Source: ONS Job Density, 2021

Table 6: Bromley Employment by Sector (2016–2021)

Type	2016	% of Total	2021	% of Total	Change (Actual)	Change (%)	Location Quotient
Agriculture, forestry & fishing	400	0%	350	0%	-50	-13%	0.2
Mining, quarrying & utilities	900	1%	900	1%	0	0%	0.7
Manufacturing	3,500	3%	2,250	2%	-1,250	-36%	0.3
Construction	8,000	7%	7,000	6%	-1,000	-13%	1.3
Motor trades	1,500	1%	1,750	2%	+250	17%	0.9
Wholesale	2,500	2%	2,250	2%	-250	-10%	0.6
Retail	13,000	12%	12,000	11%	-1,000	-8%	1.2
Transport & storage	3,000	3%	3,000	3%	0	0%	0.5
Accommodation & food services	8,000	7%	8,000	7%	0	0%	1.0
Information & communication	4,000	4%	4,000	4%	0	0%	0.8
Financial & insurance	6,000	6%	6,000	6%	0	0%	1.5
Property	2,250	2%	1,750	2%	-500	-22%	0.8
Professional, scientific & technical	11,000	10%	9,000	8%	-2,000	-18%	0.9
Business administration & support services	10,000	9%	12,000	11%	+2,000	20%	1.2
Public administration & defence	3,000	3%	2,500	2%	-500	-17%	0.6
Education	10,000	9%	11,000	10%	+1,000	10%	1.2
Health	15,000	14%	17,000	16%	+2,000	13%	1.2
Arts, entertainment, recreation & other services	7,000	6%	8,000	7%	+1,000	14%	1.7
Total	**109,050**		**108,750**		**-300**	**-1%**	

Source: ONS Business Register and Employment Survey, 2021

Commercial Market Trends

National Office Picture

3.26 The economic downturn and shift to remote working precipitated by the COVID-19 pandemic reduced demand for office space over the short-term. Demand is, however, a complex issue influenced by a wide range of factors such as financial returns, population growth, technology, economic growth, culture and productivity. Evidence relating to these factors led to a consensus among commentators that demand for office space was likely to rebound moving into the 'post-COVID' period.

3.27 These expectations have been borne out over the last twelve months – Avison Young's most recent *Economic and Property Market Review* (2023) shows that central London's office market take-up reached **13m** sqft in 2022 which is more than the 12.3m sq ft taken up in 2019 – the vacancy rate also declined from 7.7% in Q3 to **7.3%** in Q4. Similarly, the Big Nine Regional city markets[12] saw **8.2m** sqft taken up in 2022 which is close to the 8.9m sq ft taken up in 2019.

[12] Birmingham, Bristol, Cardiff, Edinburgh, Glasgow, Leeds, Liverpool, Manchester, and Newcastle.

3.28 This recovery is, however, expected to stall over the short-term due to inflation, rising interest rates and the energy crisis. Together, these factors are creating a more challenging environment for the investment market with both occupiers and investors alike taking a more stringent view of current and future opportunities.

3.29 While there is a mixed picture in relation to overall demand, the changing working patterns introduced during the COVID-19 pandemic have had a definite impact on the nature of demand. This is because most employees and employers recognise the personal and productivity benefits of remote working, but generally agree that it does not provide the community, collaboration and development opportunities offered by in-person interaction experienced in offices.

3.30 This has led to a rise in hybrid working as the 'new norm' (i.e. a mix of home and in-person working) which has pushed many businesses to look for more flexible commercial space that suits this new working pattern:

- Data from a business survey undertaken by the Chartered Institute of Personnel and Development in June 2022[13] shows that more than three quarters of businesses allow hybrid working through either formal or informal arrangements. Around half expect their employees to be in for at least two days or three days per week.
- Data from a worker survey undertaken by the ONS in January 2023 shows that over 40% of workers now work at home either all the time or in a hybrid fashion – just under 30% identified themselves specifically as 'hybrid workers'. Figures were higher in London where 40% of respondents identified as 'hybrid' workers[14].

These shifts are causing occupiers and investors to focus more on wellbeing, collaboration and experience when considering office space rather than a traditional narrower focus on size and location.

3.31 This is captured in Avison Young's *Fit for the Future: The Impact of COVID-19 on Workplace and Portfolio Strategies (2021)* research[15] which highlights that employee wellbeing is now at the forefront of occupiers' minds. Employers recognise that remote working has been good for many people, but that employees need to be in the office on a flexible basis to improve their wellbeing and to interact more closely with colleagues and friends. Survey evidence from ISG[16] suggests that employees believe that spending around two days in an office per week is optimal for wellbeing.

3.32 This shifting trend is summarised by New London Architecture:

"While businesses are very likely to retain some form of physical office as a base for their community, we should expect this to be combined with higher levels of remote working than ever before. Offices, as a result, will have to adapt, functioning more as data centres… that empower people working outside of the central office, while also maintaining a culture of collaboration that was so central to open-plan offices and co-working spaces".

3.33 The upshot of this is that the nature of space requirements is starting to shift with occupiers increasingly looking for high-quality flexible space that can respond rapidly to changing business needs, support employee wellbeing and enable collaboration. Rather than looking for large, fixed spaces many occupiers are seeking space that meets their core needs but also allows them to hire more desks or collaboration space when required. The following factors are expected to be important to office occupiers over the next few years:

- Flexible lease terms.
- Access to co-working/touch down space.
- Access to space to meet and collaborate.
- Access to temporary 'project' space.
- Spaces that are adaptable.
- More desk space per head.

[13] CIPS, Hybrid Working Survey, 2022
[14] ONS, Characteristics of Homeworkers, 2023
[15] Avison Young's Fit for the Future: The Impact of COVID-19 on Workplace and Portfolio Strategies (2021).
[16] ISG's Power of Place Survey (2020).

- A variety of breakout spaces.
- Enhanced audio-visual technology to support hybrid working patterns.
- Good quality ventilation and air filtration.
- Thorough communal hygiene arrangements built into leases.
- Well-connected locations near to public transport and local amenities.

In line with this, the following trends have started to emerge:

- The average lease period for office space across central London has become shorter and has dropped below five years for the first time[17]. While this is not a new trend, this milestone underpins the continued demand for flexibility from central London office occupiers.
- For the first half of 2023, the four largest office deals across the country were for high quality new space. CBRE also anecdotally report that prime high-quality space is currently letting more quickly than older secondary stock[18].
- Avison Young's agents report that supporting/ancillary facilities are becoming more important to attract workers back into the office and to support collaboration and employee wellbeing. Facilities that are becoming more desirable include outdoor space, event/exhibition spaces, creches, cafés etc.

3.34 It is worth noting that access to good technology and high-speed broadband connectivity is an essential enabler of hybrid working. The right digital infrastructure is crucial to link people working remotely to those in offices. Businesses will need to invest in technology to stay connected and in smart solutions to increase security while reducing inefficiencies and costs. Employees are starting to expect a seamless experience from their physical and virtual workplaces with the integration of remote workers into meetings and conversations. This ultimately feeds into and impacts the quality of fit-out expected.

3.35 The geography of demand for office space is also starting to shift in response to the impacts of COVID-19 pandemic. Major urban centres are still driving demand due to their inherent attractors (i.e. economic opportunities, social connections and amenity offer), but some employers are looking to locate parts of their office portfolio in suburban or satellite locations closer to where employees live in response to the rise in remote working. This could have a real impact on local high streets and neighbourhoods – particularly those with public transport connections into central London. In relation to the above (and London in particular), the Local Enterprise Action Partnership (LEAP)[19] write:

"Remote working gives rise to the viability of 'hub and spoke' flexible workspace hubs across the city. Outer London's high streets can benefit from this latent demand, with the end of line stations in particular being able to serve their residential neighbourhoods, as well as their wider commuter catchments".

3.36 This chimes with Avison Young's occupier survey[20], which indicates that one fifth of respondents anticipate that they will disperse their office portfolios to be closer to where their workforce lives and want to work. It is anticipated that liveable, well-connected suburbs and towns with easy access into urban centres will benefit most from this shift in demand.

Bromley's Office Picture

3.37 Bromley has a mid-sized local office market, with one primary submarket in Bromley Town Centre and secondary office clusters in Beckenham, Orpington, Petts Wood and St Mary Cray. The borough's strong transport connectivity to Central London by rail, and to the wider South East by road on the A1/M25, position Bromley as an attractive Outer London location to do business. Strong transport links include:

- National rail services from Bromley South, Penge East, Penge West, Orpington, Crystal Palace, Petts Wood, Beckenham Junction, New Beckenham, Clock House, Elmers End, Hayes and St Marys Cray

[17] Colliers, Top 5 Trends for London Offices (2023).
[18] CBRE, UK Real Estate Market Outlook (2023).
[19] LEAP, Flexible Workspace on Our High Streets (2021).
[20] Avison Young, Fit for the Future: The Impact of COVID-19 on Workplace and Portfolio Strategies (2021).

(among others) to some of London's key transport interchanges. Bromley South provides a connection into London Victoria in 18 minutes and London Blackfriars in 32 minutes.

- Regional road links to the M25 via the A21 and A20 South connect Bromley into Kent, Surrey, the wider South East and the rest of the country.
- Local road links such as the A20 North and A232 connect Bromley to Central London, Canary Wharf and Croydon.

3.38 Bromley's reputation as an attractive place to live and work just twelve miles south east of Central London has enabled the development of a strong financial and professional services base across the borough. The borough has in the past seen high quality commercial office developments come forward in Bromley Town Centre, with occupiers including finance and insurance businesses such as the Direct Line Group and the Bank of America.

3.39 However, in recent years, the quality of office space in Bromley has not kept pace with wider trends, particularly due its ageing office stock. Lack of existing quality office stock and the introduction of Permitted Development Rights in 2013 has seen Bromley's office inventory contract over the past ten years, as demolition activity and office-to-residential conversions have outpaced new construction.

3.40 Looking to the future, it is likely that the borough will see a consolidation of Bromley's office stock in line with market trends for high quality and appropriately located workspaces. This will enable the consolidated office market to remain buoyant and keep pace with occupier needs, and may spur on further office development as anticipated rental values reflect the overall quality of stock in the market.

Bromley's Office Market Trends

Table 7: Office, All Properties

	Current Rents (£psf)	Rental Growth (2013 2023)	Current Vacancy (2023)
LB Bexley	£19	39%	2%
LB Bromley	£23	52%	4%
LB Croydon	£26	67%	8%
LB Greenwich	£20	-11%	3%
LB Lambeth	£42	80%	5%
LB Lewisham	£14	3%	2%
LB Southwark	£54	16%	8%
Dartford	£24	21%	5%
Sevenoaks	£30	74%	4%
Tandridge	£19	37%	4%
Outer South London	£29	64%	6%

Source: Costar, 2023

Office Rents

3.41 Bromley's average office rents are **c.£23** psf which is lower than its more central neighbours (Southwark and Lambeth) and its less central neighbour, Croydon (£26 psf). This likely links to the size, location and quality of the units let in Bromley versus these locations and suggests that demand for office properties may be stronger in some other locations.

3.42 Bromley has also seen lower levels of rental growth over the last ten years versus many of its neighbours – the borough saw a **+52%** increase in rental values from 2013 to 2023 which is lower than the Outer South London average (+64%) and several comparators including Lambeth, Sevenoaks, and Croydon (see Figure 13. Some comparators have, however, seen slower rental growth in comparison to Bromley - Greenwich saw a decline in rental values and Lewisham (+3%), Southwark (+16%) and Dartford (+21%) have seen modest growth.

3.43 On a timeseries basis, Bromley saw a steady increase in rental values from 2013 to a peak at **£26** psf in 2017 before starting to decline towards **£22** psf in 2022. Similar trends are reflected in Lewisham which reached a peak of **£24** psf in 2017 before falling to £14 psf in 2022. This is not a consistent trend across neighbouring boroughs with others experiencing a small increase or remaining static over the same period. The COVID-19 pandemic impacted Bromley and all comparators (2020-2021), with temporarily reduced office demand reflected in slight drops in value around this period with some signs of recovery by 2022 and 2023.

3.44 Figure 14 shows that some of Bromley's highest office rental values have been achieved in Beckenham, and Bromley Town Centre (up to £50 psf) with most mid-range values achieved in Orpington, Penge and Hayes, Farnborough and Biggin Hill (£20 to £40 psf).

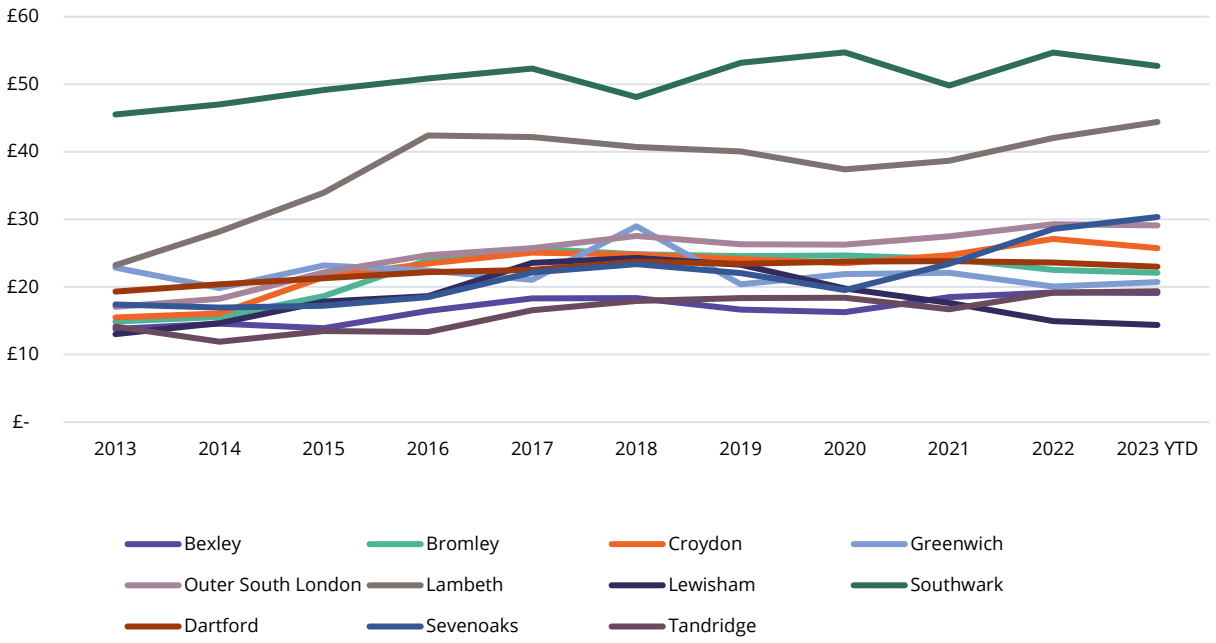


Figure 13: Achieved Rent Office Space, Bromley, and Comparator Locations
Source: Costar, 2023

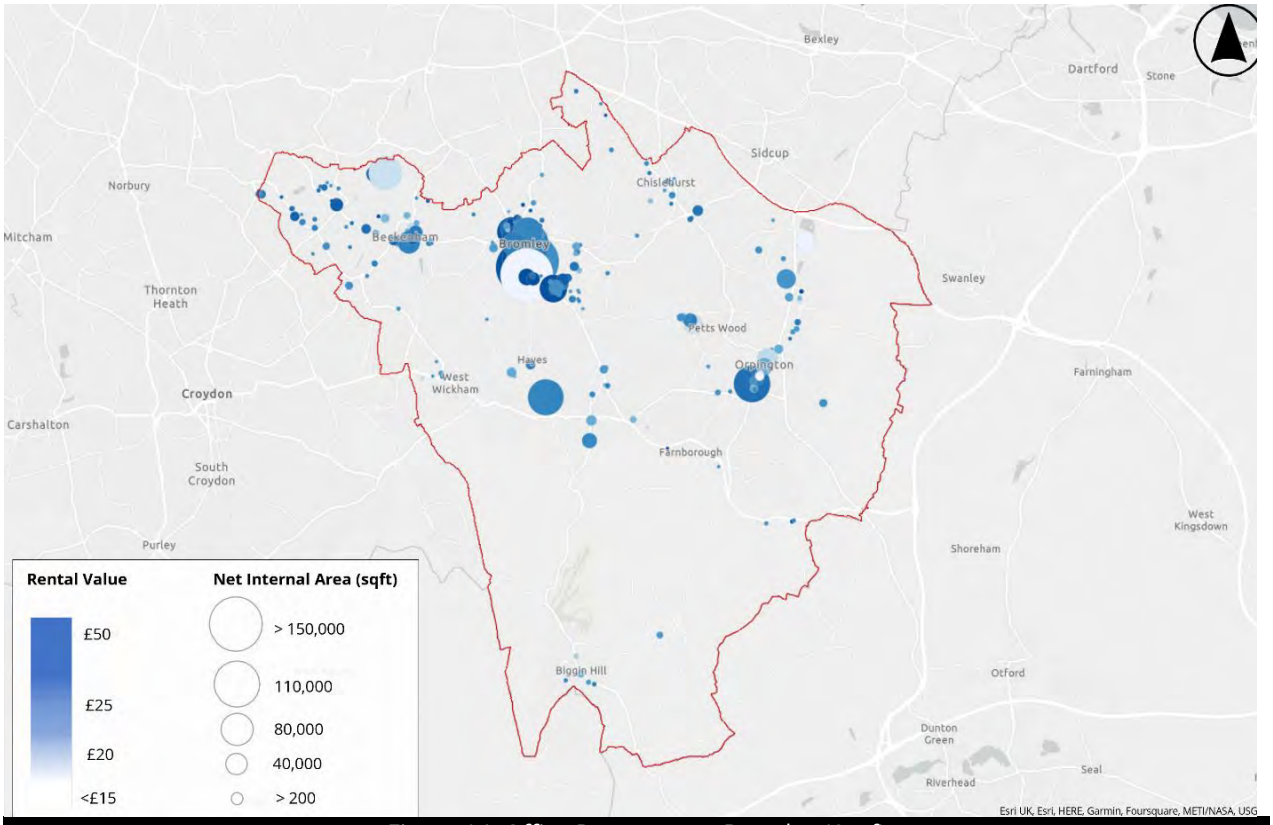


Figure 14: Office Rents across Bromley (£psf)
Source: *Costar, 2023*
Note: The size of each point indicates the total floorspace let at this location. Each dot represents a postcode.

Office Vacancy Rates

3.45 Bromley's office vacancy rates are around **c.4%** - this is lower than most neighbours except Bexley and Lewisham, and in line with Sevenoaks and Tandridge. This signals that the existing office stock is in demand and that there may be a need to consider whether there is a gap in provision in terms of the current offer.

3.46 In line with relatively low rental growth, Bromley's office vacancy rates have fluctuated between **2%** and **4%** over the last decade (see Table 8). Reflecting similar trends to Bexley, Sevenoaks and Tandridge, all four boroughs have seen relatively low and declining vacancy rates between 2013 and 2019 followed by a small rise in vacancy after this period to present day. This trend is also reflected across Outer South London and larger office markets such as Lambeth and Southwark, though in these locations the absolute vacancy rates are higher than Bromley.

3.47 While this may reflect sustained demand it is likely that the loss of office space to other uses via Permitted Development Rights (PDR) has had a strong influence on these figures. Evidence collected via LBB as part of their monitoring of the Local Plan shows that there has been a loss of almost **-9,000 sqm** of office space between 2019 and 2023, and the London Development Database shows that there was a loss of **almost -2,000 sqm** between 2009 and 2019. Assets that have been or are in the process of being converted to residential include:

- County House, Beckenham Road, Penge.
- 34 Beckenham Road, Beckenham.
- Title House, Elmfield Road, Bromley.
- Berwick House, Knoll Rise, Orpington.

3.48 Figure 15 shows that most vacant office space is in Bromley Town Centre - older office buildings around Bromley South account for the largest vacant spaces here, with some smaller vacant offices on Bromley High Street. The remaining vacant units are located across the borough in Beckenham, St Paul's Cray and Orpington.

Table 8: Office, Vacancy Rates, 2013-2023

Period	LB Bexley	LB Bromley	LB Croydon	LB Greenwich	LB Lambeth	LB Lewisham	LB Southwark	Dartford	Sevenoaks	Tandridge	Outer South London
2023	2%	4%	8%	5%	5%	2%	8%	5%	4%	4%	7%
2022	2%	3%	8%	5%	4%	2%	7%	4%	4%	4%	6%
2021	1%	4%	9%	5%	4%	1%	7%	5%	2%	4%	6%
2020	1%	4%	6%	2%	5%	1%	5%	4%	2%	2%	5%
2019	0%	4%	5%	1%	4%	1%	2%	3%	1%	0%	3%
2018	0%	3%	5%	1%	5%	2%	6%	2%	1%	1%	3%
2017	1%	3%	5%	2%	2%	1%	3%	2%	2%	2%	3%
2016	1%	2%	7%	1%	3%	1%	5%	3%	1%	2%	4%
2015	1%	2%	6%	4%	3%	5%	5%	3%	1%	4%	5%
2014	1%	3%	8%	5%	3%	3%	6%	4%	3%	8%	7%
2013	2%	4%	11%	6%	6%	2%	7%	9%	6%	6%	8%

Source: Costar, 2023

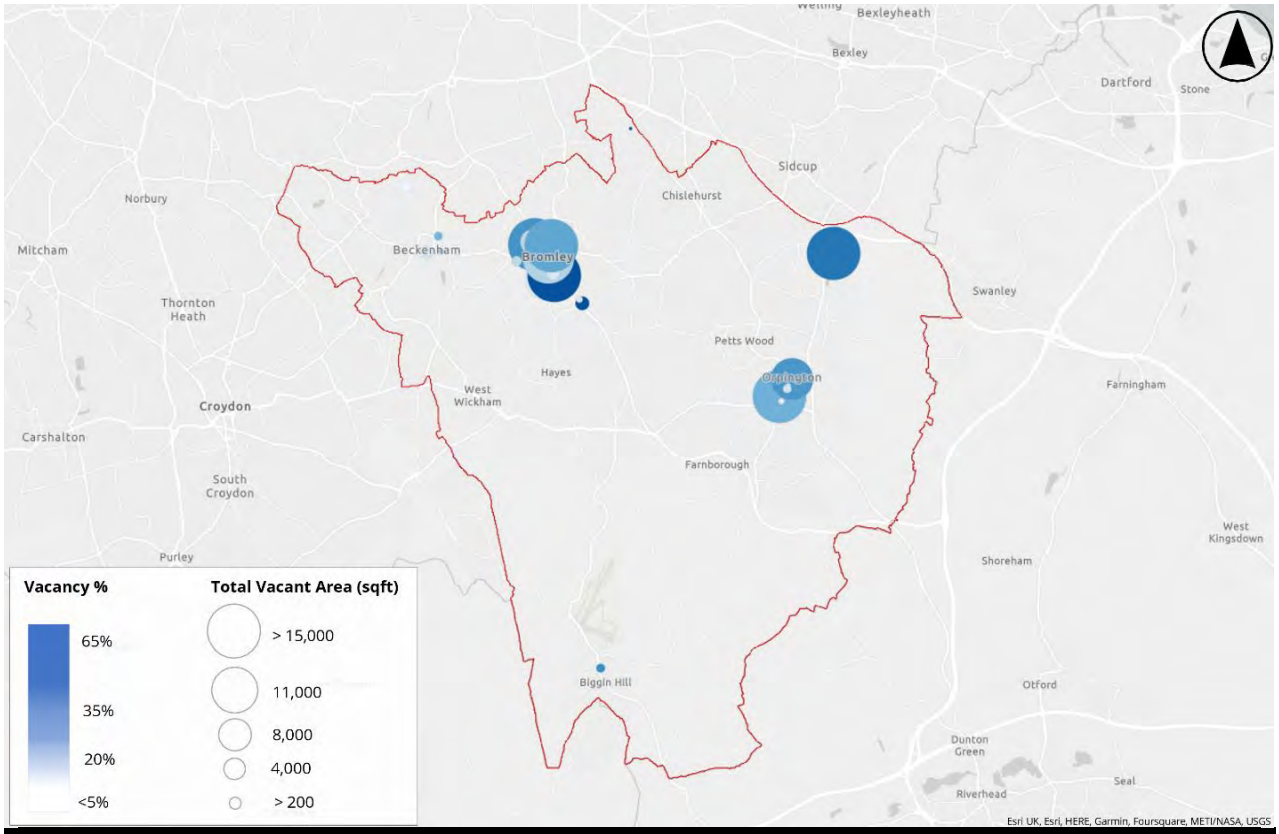


Figure 15: Vacancy Office Map Bromley

Source: *Costar, 2023*

Note: The size of each point indicates the total vacant floorspace at this location. Each dot represents a postcode.

Office Take Up

3.49 In terms of take-up, Bromley has seen around **260** office lease deals over the last ten years (see Table 9) with the average size of unit per deal at **c.2,900** sqft which is higher than Lewisham, Sevenoaks and Tandridge but is lower than the Outer South London average, reflecting the nature of local office stock. Greenwich's office market, which is slightly smaller in size, has seen less than half the number of deals, but with a larger average size of unit at c.3,800 sqft which likely reflects the larger average size of properties in Greenwich Peninsula.

3.50 Office take-up by unit size demonstrates highest demand for units below 10,000 sqft, with the greatest take-up of office space sized between 500 and 2,000 sqft (116 deals or 44% of properties transacted) followed by units sized 2,000 to 5,000 sqft (78 deals or 30% of deals transacted). This reflects the size profile of office space in the borough, and in terms of deals is a very similar profile to Outer South London (see Table 11).

Table 9: Office, Take-up, 2013-2023

	Total Deals	Total sqft leased	Avg. size of unit (sqft)
LB Bexley	87	243,105	2,794
LB Bromley	264	767,567	2,907
LB Croydon	464	2,668,219	5,750
LB Greenwich	116	445,752	3,843
LB Lambeth	635	3,384,417	5,330
LB Lewisham	121	337,235	2,787
LB Southwark	2,007	11,746,319	5,853
Dartford	145	381,588	2,632
Sevenoaks	116	445,752	3,843
Tandridge	110	152,033	1,382
Outer South London	2,300	8,260,193	3,591

Source: Costar, 2023

Table 10: Office, Take-up by Floorspace Bracket, 2013-2023

	< 500 sqft	500 2,000 sqft	2,000 5,000 sqft	5,000 10,000 sqft	10,000 15,000 sqft	15,000 20,000 sqft	> 20,000 sqft	Total Properties	Total Floorspace leased (sqft)
LB Bexley	16 (18%)	39 (45%)	17 (20%)	11 (13%)	1 (1%)	3 (3%)	0 (0%_	87	243,105
LB Bromley	33 (13%)	116 (44%)	78 (30%)	28 (11%)	4 (2%)	0 (0%)	5 (2%)	264	767,567
LB Croydon	31 (7%)	188 (41%)	128 (28%)	65 (14%)	23 (5%)	7 (2%)	22 (5%)	464	2,668,219
LB Greenwich	13 (11%)	51 (44%)	25 (22%)	16 (14%)	6 (5%)	0 (0%)	5 (4%)	116	445,752
LB Lambeth	92 (14%)	294 (46%)	156 (25%)	49 (8%)	20 (3%)	2 (0%)	22 (3%)	635	3,384,417
LB Lewisham	15 (12%)	73 (60%)	19 (16%)	8 (7%)	1 (1%)	1 (1%)	4 (3%)	121	337,235
LB Southwark	172 (9%)	793 (40%)	584 (29%)	228 (11%)	97 (5%)	34 (2%)	99 (5%)	2,007	11,746,319
Dartford	30 (21%)	71 (49%)	24 (17%)	12 (8%)	4 (3%)	3 (2%)	1 (1%)	145	381,588
Sevenoaks	13 (11%)	51 (44%)	25 (22%)	16 (14%)	6 (5%)	0 (0%)	5 (4%)	116	445,752
Tandridge	29 (26%)	59 (54%)	19 (17%)	1 (1%)	2 (2%)	0 (0%)	0 (0%)	110	152,033
Outer South London	286 (12%)	1,076 (57%)	577 (25%)	224 (10%)	67 (3%)	18 (1%)	56 (2%)	2,304	8,260,193

Source: Costar, 2023

Table 11: Office, Number of Transactions, 2013-2023

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
LB Bexley	10	14	9	9	12	9	7	4	9	3	1
LB Bromley	34	49	39	25	29	29	18	8	14	18	1
LB Croydon	55	69	60	59	50	67	35	29	20	18	2
LB Greenwich	14	15	14	7	10	16	6	9	7	9	9
LB Lambeth	57	60	73	79	72	76	59	60	50	40	9
LB Lewisham	21	15	9	12	21	11	10	5	10	7	0
LB Southwark	226	229	215	214	237	243	185	97	132	191	38
Dartford	19	25	19	15	20	17	8	9	8	5	0
Sevenoaks	30	31	42	21	30	31	17	25	17	18	5
Tandridge	6	12	14	12	15	19	13	9	3	4	3
Outer South London	289	329	270	223	243	267	180	139	173	139	52

Source: Costar, 2023

National Industrial Picture

3.51 National demand for industrial space has been resilient throughout the COVID-19 pandemic and beyond, with record levels of take-up in recent years. As set out in Avison Young's latest *Big Box Bulletin* (2023), which focuses on Grade A industrial space over 100,000 sqft, 2022 saw **37.6m** sqft let across the UK. This represents a **+7.1%** increase in take-up versus the five-year average and marks three consecutive years of **30m+** sqft take-up.

3.52 There are four main trends influencing rising demand for industrial stock:

- **On-Shoring:** Linked to both BREXIT and the COVID-19 pandemic many occupiers have increased their stock holding and local contingency capacity to increase resilience in supply chains. Geo-political

conditions such as the war in Ukraine, and the Suez Canal obstruction in 2021, have furthered this trend. Many businesses are on-shoring storage activity that has traditionally been undertaken overseas to avoid any disruption resulting from border controls or other socio-political shocks. Commentators also expect to see some reshoring of manufacturing from Europe and the Far East to improve resilience in global supply chains.

- **Automation:** The development of new advanced technology is leading to an increase in automation across many industrial sectors. This is creating demand for industrial units with both greater building heights, particularly those in excess of 20m, and good levels of electrical power. Whilst automation is being increasingly adopted to improve efficiency this is usually in conjunction with a warehouse labour force rather than as a direct replacement.
- **E-Commerce:** The UK already had the highest penetration of online sales in the world before the COVID-19 pandemic, but the various lockdowns accelerated this trend. E-commerce can be split into two main categories, food and non-food retail, and activity in both parts of the industry increased significantly during and after the pandemic. This rising consumer demand led to an immediate reaction across the e-commerce sector, focused on the largest multi-million sqft buildings to last mile logistics facilities below 100,000 sqft.
- **Technology:** Many industrial sectors are going through a technological revolution. This is particularly the case for the automotive industry which is seeing a transfer from the internal combustion engine to electric motors which requires major investment by the industry in new technology and Gigafactories. Similarly, the rising role of digital and data in the day-to-day lives of people and businesses is creating demand for more data storage driving the creation of energy-intensive data centres across the country.

3.53 In London a severe lack of general industrial and light industrial stock of all sizes and typologies has limited market activity. Since 2001 industrial vacancy rates have dropped from **16%** to around **4%** today – this illustrates that stock is well-used and unlikely to be meeting demand from businesses[21]. This is emphasised in Centre for London's *Making Space: Accommodating London's Industrial Future* report which sets out:

"The 2017 London Industrial Land Demand Study showed that in several London subregions, including central London, there were virtually no vacant industrial buildings for businesses to move into… Such low vacancy rates mean that industrial businesses are highly unlikely to find accommodation that meets their needs at a price they can afford. Anecdotal evidence from our interviews confirmed that industrial businesses have great difficulty in finding suitable space to operate from in London".

3.54 This constrained supply picture has put immense upwards pressures on land values, with some sites in London commanding up to **£10m** per acre, as highlighted in the GLA's London Industrial Land Supply Study (2023) (see Chapter 2). Rents also increased significantly during 2022, rising by an average of **+13.4%** across the country as a whole[22].

3.55 While new industrial buildings are being built in London there are relatively few of them, and they tend to be designed for high-value and high-growth industries such as logistics or data centres. This is because demand is particularly high from businesses in these sectors which are able to afford higher rents than some other more traditional industrial sectors. This is highlighted in PwC's Emerging Trends in Real Estate Report (2021), which predicts that demand is expected to remain strong from logistics, life science and data centre occupiers moving forward, and they present clear opportunities for investors.

3.56 While the provision of such space is important for London's economy, more traditional industrial activities that require both industrial and light industrial space have reported that the demand from higher-value occupiers has further inflated industrial rents making it more difficult for them to access the space they need at a price they can afford. This is being exacerbated by the loss of supply across both Inner and Outer London in recent decades.

3.57 These trends are captured in the GLA's new *Industrial Land Supply Audit* (2023) - as set out in the policy context chapter, London's land supply has shrunk significantly over the last 20 years with the most significant loss

[21] Centre for London, Making Space: Accommodating London's Industrial Future (2022).
[22] Avison Young, Big Box Bulletin (2023).

over the past five years. The planning pipeline signifies that this trend is set to persist at an unprecedented rate in coming years. Of the stock that does exist, there is also a significant challenge around obsolescence particularly in the context of Minimum Energy Efficiency Standard (MEES) regulations.

Bromley's Industrial Picture

3.58 Bromley has a mid-sized industrial market based around key industrial sites at the Cray Valley – comprised of Crayfields Industrial Park and St Mary Cray – Lower Sydenham, Elmers End and Biggin Hill. These sites serve manufacturing, wholesale and motor trades occupiers, among others, with employment in motor trades experiencing significant growth in the borough over the last decade.

3.59 The borough is also home to a specialised cluster of aviation-related businesses at Biggin Hill Airport, including businesses directly involved in aviation and engineering, and the wider supply chain at Biggin Hill Airport Aviation Centre, Biggin Hill Airport Trading Estate, Concorde Business Centre and Formula One Management.

3.60 The borough's proximity to Central London, and to the M25 by road, means that industry is well-located to connect to London markets and across the wider South East. This also means that the borough is well-placed to capture the increase in last mile logistics and distribution activity nationally.

3.61 New industrial developments such as at HALO Industrial Park in St Mary Cray, combined with increasing rental values and falling vacancy rates, suggests that Bromley's industrial space will continue to be in high demand moving forward.

Bromley's Industrial Market Trends

Table 12: Industrial, All Properties

	Current Rents (£psf)	Rental Growth (10 years)	Current Vacancy (2023)
Bexley	£15	148%	5%
Bromley	£13	92%	5%
Croydon	£16	99%	5%
Greenwich	£14	131%	5%
Lambeth	£23	182%	5%
Lewisham	£15	95%	5%
Southwark	£20	108%	6%
Tandridge	£8	76%	4%
Dartford	£14	67%	6%
Sevenoaks	£12	103%	4%
Outer South London	£15	110%	4%

Source: Costar, 2023

Industrial Rents

3.62 Bromley's industrial rents are comparatively low at **c.£13** psf – this is below most neighbouring boroughs including Bexley (£15 psf), Croydon (£16 psf), Greenwich (£14 psf), Lewisham (£15psf), Lambeth (£23 psf) and Outer South London more broadly (£15 psf). It has, however, experienced stronger levels of rental growth than few of its neighbouring boroughs over the past decade reflecting increasing interest from industrial occupiers (see Figure 16).

3.63 Despite relatively good rental growth, rental values in Bromley have however started to stagnate in recent years. Industrial rents peaked at **£15** psf in 2021 and have since fallen to **£13** psf, with this trend also reflected in Lewisham and Tandridge (see Figure 16). This is unusual compared to the regional picture and may reflect a change in the nature and quality of stock coming onto the market at particular times rather than any fundamental changes to value sets.

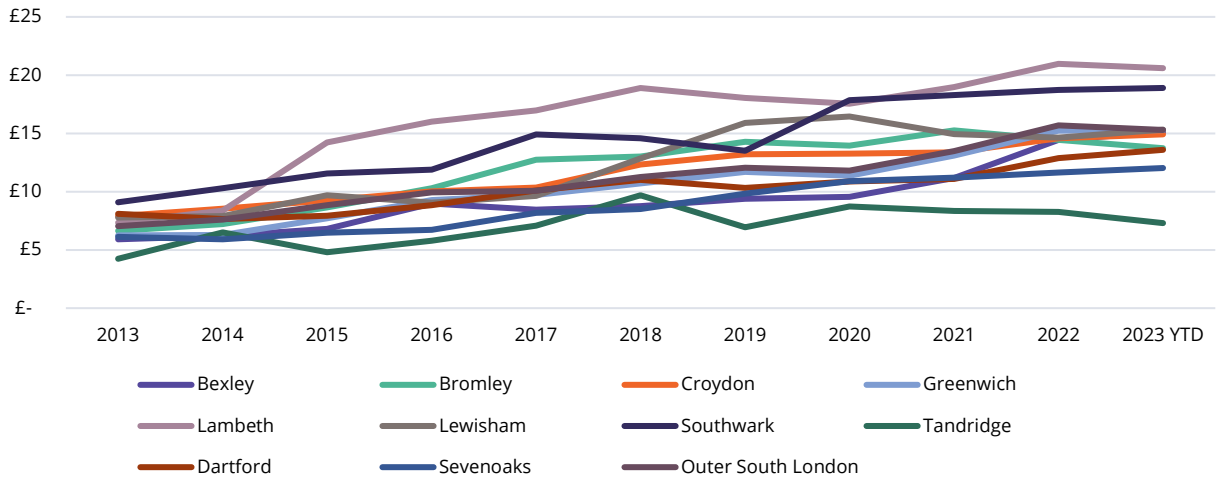


Figure 16: Achieved Rent Industrial Space, Bromley, and Comparator Locations
Source: Costar, 2023

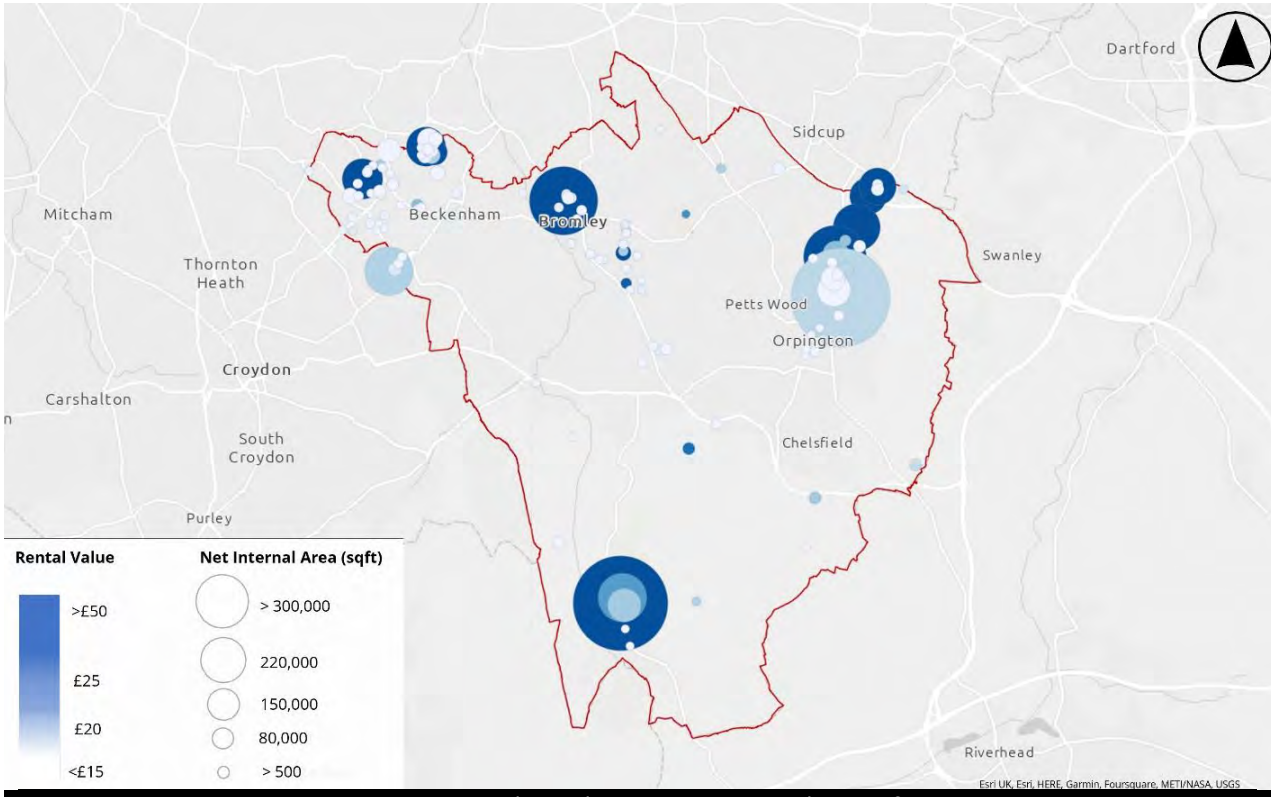


Figure 17: Industrial Rents across Bromley (£psf)
Source: *Costar, 2023*
Note: The size of each point indicates the total floorspace let at this location.

3.64 The highest industrial rental values in Bromley have been achieved on isolated units around Lower Sydenham, Bromley Town Centre, Biggin Hill and the North of the Cray Valley (£45 to 60 psf) with values more in line with the borough's average achieved across Elmers End, Penge and the southern end of the Cray Valley (see Figure 17).

Industrial Vacancy Rates

3.65 Bromley's industrial vacancy rates are **c.5%** which is below the GLA's recommended 8% benchmark – vacancy rates lower than this mean that businesses looking to expand or locate in an area are often unable to therefore limiting potential economic growth of an area. This theme is also reflected across neighbouring boroughs with all having current vacancy rates of between 3% to 7% (see Table 13).

3.66 The highest concentrations of vacant industrial units in Bromley are on the borough's main industrial estates including Lower Sydenham, Bromley, St Mary Cray and Biggin Hill (see Figure 18). Vacancies in these areas are individual units that have not yet been re-let rather than concentrations of widespread vacancies.

Table 13: Industrial, Vacancy Rates, 2013-2023

Period	LB Bexley	LB Bromley	LB Croydon	LB Greenwich	LB Lambeth	LB Lewisham	LB Southwark	Dartford	Tandridge	Sevenoaks	Outer South London
2023	5%	5%	4%	4%	3%	6%	7%	6%	5%	4%	5%
2022	4%	6%	4%	5%	3%	5%	6%	5%	1%	4%	5%
2021	2%	7%	3%	6%	2%	4%	4%	12%	1%	4%	5%
2020	3%	9%	1%	1%	2%	2%	2%	3%	0%	1%	3%
2019	3%	7%	1%	0%	2%	3%	1%	2%	1%	1%	2%
2018	3%	2%	0%	1%	2%	2%	2%	1%	1%	1%	2%
2017	6%	2%	1%	2%	1%	4%	2%	1%	1%	4%	3%
2016	3%	1%	2%	2%	1%	1%	6%	1%	6%	2%	3%
2015	2%	4%	1%	3%	2%	1%	6%	2%	19%	12%	3%
2014	3%	3%	2%	2%	3%	3%	6%	4%	15%	8%	4%
2013	6%	6%	3%	4%	4%	3%	11%	9%	16%	7%	7%

Source: Costar, 2023

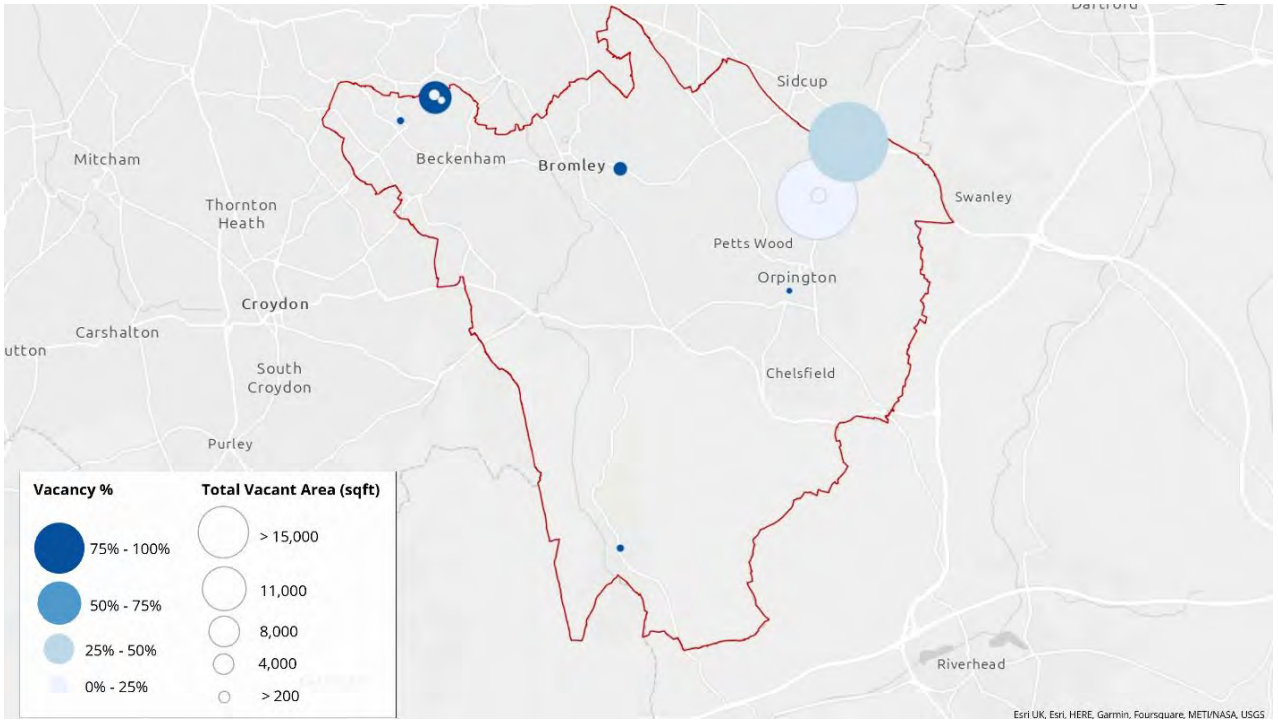


Figure 18: Vacancy Industrial Map Bromley
Source: Costar, 2023
Note: The size of each point indicates the total vacant floorspace at this location.

Industrial Take Up

3.67 Bromley has seen **169** deals across **1.5m** sqft of industrial property over the past decade. This is a relatively low number of deals considering Bromley's quantity of industrial stock compared to several neighbouring boroughs indicating low levels of churn and dynamism. Take-up of Bromley's industrial stock averaged **c.9,000** sqft per unit over this period which is larger than most neighbouring boroughs except bar two.

Table 14: Industrial, Take-up, 2013-2023

	Total Deals	Total sqft leased	Avg. size of unit (sqft)
LB Bexley	359	4,523,176	12,599
LB Bromley	169	1,512,445	8,949
LB Croydon	239	1,773,624	7,421
LB Greenwich	242	1,896,214	7,836
LB Lambeth	156	803,865	5,153
LB Lewisham	164	855,551	5,217
LB Southwark	262	1,534,371	5,856
Dartford	273	6,912,271	25,320
Sevenoaks	180	1,109,616	6,165
Tandridge	57	434,453	7,622
Outer South London	1,913	16,374,609	8,560

Source: Costar, 2023

3.68 Based on unit size, the majority of industrial take-up in Bromley has been for units less than **20,000** sqft, with the highest number of deals for units between **2,000 and 5,000** sqft (65 deals) followed by between 5,000 to 10,000 sqft (43 deals). Bromley has fewer deals for larger unit sizes compared to other neighbouring boroughs reflecting the nature of local stock (see Table 15).

Table 15: Industrial, Take-up by floorspace bracket, 2013-2023

	< 2,000 sqft	2,000 5,000 sqft	5,000 10,000 sqft	10,000 20,000 sqft	20,000 50,000 sqft	50,000 100,000 sqft	> 100,000 sqft	Total Properties	Total Floorspace leased (sqft)
LB Bexley	91	112	75	39	25	11	6	359	4,523,176
LB Bromley	20	65	43	26	10	5		169	1,512,445
LB Croydon	76	70	49	23	17	3	1	239	1,773,624
LB Greenwich	52	82	56	31	17	4		242	1,896,214
LB Lambeth	40	81	19	14		1	1	156	803,865
LB Lewisham	46	76	29	7	4	2		164	855,551
LB Southwark	100	136	81	49	20	3		389	1,534,371
Dartford	52	88	42	37	32	13	9	273	6,912,271
Sevenoaks	59	57	36	23	2	2	1	180	1,109,616
Tandridge	24	16	6	4	6	1		57	434,453
Outer South London	437	682	404	225	124	31	10	1,913	16,374,609

Source: Costar, 2023

Table 16: Industrial, Number of Transactions, 2013-2023

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
LB Bexley	37	44	30	37	27	50	27	38	36	31	2
LB Bromley	20	18	10	20	21	13	17	12	15	20	3
LB Croydon	32	35	31	18	21	24	19	19	24	13	3
LB Greenwich	34	28	15	31	32	18	18	13	25	23	6
LB Lambeth	21	9	16	10	14	15	18	14	20	16	3
LB Lewisham	13	16	20	10	14	9	18	20	28	11	5
LB Southwark	31	30	27	9	22	36	29	13	29	28	9
Dartford	32	44	28	23	23	18	22	19	30	32	2
Sevenoaks	24	27	21	8	20	20	12	9	16	22	1
Tandridge	6	6	8	3	8	4	6	5	4	5	2
Outer South London	216	218	173	215	201	200	160	167	172	160	31

Source: Costar, 2023

Focus On: Bromley's Affordable Workspace

There are two broad employment space categories office and industrial. These are conventional' typologies that cater for more established and/or corporate occupiers as detailed throughout this chapter. While most employment space categories are under pressure in London, the scale and nature of occupiers in conventional' spaces means they are often more resilient to market fluctuations than smaller and more local enterprises. The private sector also has a long tradition of providing these spaces in viable and attractive locations.

Smaller and independent businesses, in contrast, typically operate closer to the margins and are more sensitive to any changes in rents and lease terms. This is noteworthy as small businesses account 99.8% of all enterprises in London, generate around half of all business turnover and sustain over half of all employment[23].

A number of specialised employment space typologies have therefore emerged over the last two decades to meet the demand and needs of smaller and independent businesses these are typically referred to as workspaces. Local authorities have often played a role in bringing forward such spaces in their economic growth areas, though the private sector does play a role.

These workspaces range from managed workspace targeted at digital businesses (e.g. the Chocolate Factory in Wood Green) through to maker spaces for creative production businesses (e.g. Bloqs in Meridian Water). They tend to be targeted at specific sectors and aim to meet the needs of similar types of businesses. While there are significant differences between typologies, there are some commonalities:

- They are typically traditional office or industrial spaces sub divided and let to multiple tenants;
- They are generally targeted at smaller businesses and entrepreneurs;
- They tend to be operated by multi skilled workspace providers, often at slim margins;
- They can be operated in a light touch way, or intensively like a members' club;
- They offer flexible terms to tenants; and,
- They promote networking and collaboration between different occupiers.

[23] Greater London Authority, The Affordability Crisis (2018)

Some of these workspaces are considered affordable though there is a lack of clarity about what this actually means. Policy E3 of the *London Plan* (2021) defines it as:

Workspace that is provided at rents maintained below the market rate for a specific social, cultural, or economic development purpose. It can be provided directly by a public, charitable or other supporting body; through grant and management arrangements (for example through land trusts); and/or secured permanently by planning or other agreements" (p246).

Such circumstances (or "Purpose[s]") include workspace that is:

- Dedicated to specific sectors that have social value such as charities or social enterprises.
- Dedicated to specific sectors that have cultural value such as artists studios and designer maker spaces.
- Dedicated to disadvantaged groups starting up in any sector.
- Providing educational outcomes through connections to schools, colleges or higher education.
- Supporting start up businesses or regeneration.

There is, however, no guidance on what *…rents maintained below the market rate"* constitutes, or how to secure such space, leading boroughs to develop their own approaches to delivering and securing what they consider affordable workspace. The primary mechanism most use is through the use of s106 agreements as part of new large scale commercial developments in line with specific individual affordable workspace policies.

The main limitation of most borough level policies is that they generally reduce the concept of affordability to a discount to the market rate, and where this is the case there is significant variation on what boroughs think the discount should be.

Affordability is, however, a much broader concept and means different things to different business and operators. There are a wide range of other factors that are as, if not more, important to businesses and operators in relation to affordability than a simple discount to market rent. The most important factors vary by sector, and therefore workspace provision should seek to respond to the needs of an area s priority sectors.

A truly effective approach to affordable workspace delivery should consider all the factors affecting affordability of space to ensure that a range of spaces are available and affordable to target businesses. A summary of these other factors is provided in the table below, which provides a more nuanced response to the barriers that MSEs face in starting and scaling up. This does not mean that discounts to market rent should be excluded, but rather considered as part of a wider definition of affordability.

Factor	Importance to Businesses
Rent Free Periods	Small businesses that take on space in workspaces with weaker covenants often have to pay an upfront fee. This is unlike traditional transactions for conventional' commercial space where occupiers tend to benefit from a rent free period to help cover set up and fit out costs. Subsiding rent free periods for small businesses could help them accelerate their activity in a new location, ease their cash flow and/or allow them to cover fit out costs. These up front costs are a greater barrier to some businesses entering the market than a monthly rate.
Flexible Lease Terms	Many small businesses are unable to sign traditional long leases that are commonplace in the conventional' commercial property market. This is because many are start ups and are unsure what their space requirements will be over an extended period of time. Coupled with often punitive and costly lease break terms, traditional leases therefore do not work for many small businesses. Flexible lease terms can therefore attract young businesses to a location and encourage them to innovate and experiment with new ideas. Many workspaces offer rolling three month leases and month to month licences are not uncommon, and for some businesses this flexibility is as, if not more, important than a monthly rate.
All Inclusive Rents	Many workspaces offer all inclusive rents which include things like business rates, energy bills, WiFi, showers, lockers, meeting rooms, reception staff etc. While the monthly or price per sq ft is often higher in these workspaces the *total cost* can be lower as occupiers benefit from economies of scale. This, coupled with the provision of plumbed in' infrastructure (e.g. wireless internet connectivity), can actually reduce costs for small businesses in the long run.

Turnover Rents	Traditional rents do not consider the turnover of business or the value of the business itself. Some workspaces are therefore exploring alternative forms of rent like turnover rents. This allows businesses to pay what they can afford while also ensuring that both businesses and the operator receive a fair deal based on financial performance. This can be more helpful than a standard discount to market rent for some businesses as it lowers the barriers to entry during their start up phase which is traditionally when business failure is highest.
Fit Out Support	One of the main obstacles for many small businesses is the initial fit out cost of their workspace, which is particularly pertinent for specialised and technical activities (e.g. pharmaceutical research, food development, agri tech development etc) which require more nuanced specifications (e.g. related to ventilation, ceiling heights, spacing, safety features etc). The fit out of space can be a major issue for start ups and micro businesses as they tend not to have sufficient cash flows to finance the initial upfront investment. Providing a bespoke fit out or financial support for fit can therefore, in specific circumstances, be as important as monthly rent for some businesses.
Shared Equipment	Similarly to the above many production businesses require specialist equipment to operate (from saws and drills to 3D printers). This can be an issue for small businesses due to the upfront investment required, and therefore shared equipment and facilities can be important to make new and smaller businesses more viable. The savings made from not having to finance new equipment costs can have a significant impact on the affordability of a space for occupiers.
Unit Sizing	The issue around affordability for some small businesses is not the cost of the space on a square foot basis, but rather minimum size thresholds that mean they have to lease more space than they can afford. Adaptable unit sizes and flexibility in renting more or less space as a business evolves can therefore be crucial to the sustainability of a new business, and is less about the actual price per sq ft.
Business Rates	Business rates are charged based on a physical space rather than the nature of a business, which can have a significant impact on operating costs for small businesses. For example, a micro business working in an individual workspace may be exempt from business rates if the space is below the size threshold, but a small business using a co working space will be liable for business rates as the operator (who leases a much larger space) will pass their rate liability onto the occupier. In such cases the expected saving made by opting for a co working space over an individual unit can in some circumstances be offset by the application of the business rates. In such cases a discount or reduction to business rates would help make space more affordable to a larger number of businesses and reduce overall costs. In some cases this would improve affordability meaning a further discount to market rate may not be required.

On this basis Bromley has a small number of more affordable workspaces as the examples below illustrate:

- Anerley Business Centre (Anerley Road, Anerley): Offers relatively low cost private offices at all in rents incorporating furniture, telephones, utilities, cleaning, internet and parking. Meeting rooms are also available to hire for £5 p/h and there is access to shared kitchen facilities. Tenants are able to break their leases after six months providing some flexibility.
- Patch Workspace (North Street, Bromley): Offers flexible hot desks, dedicated desks and private offices at relatively accessible rates (£27 p/d for hot desk, £35 p/d for dedicated desk and £375+ for private offices). Rents are all in and include access to refreshment stations, shared kitchen and board rooms for hire.
- Contingent Works (Elmfield Road, Bromley): High quality and well fitted out flexible workspace catering to homeworkers and entrepreneurs. Offers a range of different pricing options for access to shared or private spaces, which are all inclusive of desks, phone booth, refreshments, utilities etc. Examples include hotdesking at £30 p/d, resident membership at £420 p/m and studios at £600 p/m, as well as options to buy a certain number of hours per month. Beyond the typical office offer they offer virtual office services and a podcast studio.

4. Need Context: Determining Future Employment Land Need

Chapter Summary

This chapter determines Bromley's future economic development needs through the analysis of different scenarios and sensitivities informed by the demand context set out in the preceding chapter. Four scenarios are considered which focus on:

1. Labour Demand: This draws on employment projections from Experian and the GLA.
2. Enhanced Airport Driven Labour Demand: This adjusts employment projections from Experian and the GLA based the additional floorspace requirements that may arise from increased air traffic activity at Biggin Hill airport.
3. Past Take Up Rates: This projects forward past commercial take up rates.
4. Supressed Industrial Demand: This scenario considers the impact of higher levels of employment growth from the industrial sector on floorspace requirements using the British Property Federation s Supressed Demand methodology.

Following analysis of these scenarios, as well as a consideration of the benefits and disbenefits of each, a synthesis scenario has been identified which represents the minimum employment floorspace and land to plan for as part of the borough s new *Local Plan* (2023 2038). As set out later in the chapter figures are presented as a range and capture the highest and lowest figures from all the scenarios bar Scenario 3: Past Take Up Rates as the forecasts in this scenario are more likely to reflect Bromley's historically constrained land supply and market than levels of past and future demand. A summary of the synthesis scenario, allowing for 'best practice churn and windfall adjustments, is set out below.

		Churn allowance	Churn and Windfall allowance
Floorspace (SQM)			
EG(i)/(ii) (office)	+43,972 to +58,797	+44,806 to +59,631	+55,294 to +70,119
B2/EG(iii) (general industrial)	+15,394 to +30,760	+16,826 to +32,192	+17,905 to +33,271
B8 (warehousing)	+6,640 to +13,268	+7,983 to +14,611	+15,724 to +22,352
Total	**+66,006 to +102,825**	**+69,615 to +106,434**	**+88,924 to 125,743**
Land (Ha)			
EG(i)/(ii) (office)	2.6 to 3.5	2.7 to 3.6	3.3 to 4.2
B2/EG(iii) (general industrial)	4.0 tp 8.1	4.4 to 8.5	4.7 to 8.7
B8 (warehousing)	1.7 to 3.5	2.0 to 3.7	3.9 to 5.6
Total	**8.3 to 15.1**	**9.1 to 15.7**	**11.9 to 18.5**

It is recommended that these figures are taken forward as the as the central case for the estimate of future employment floorspace and land requirements.

4.1 This chapter identifies future economic growth needs in Bromley. In line with the PPG, a series of scenarios are used to do this starting with labour demand forecasts followed by a consideration of 'reasonable alternatives'. The four scenarios considered are[24]:

- Scenario 1: Labour Demand: This 'base' scenario draws on employment projections from Experian and the GLA.

[24] This study does not include a labour supply scenario as the complexity of London's labour market makes it difficult to develop a robust projection of the borough's future workforce, particularly as the latest Census does not include evidence on commuting flows.

- Scenario 2: 'Enhanced' Airport Driven Labour Demand: This scenario adjusts the 'base' scenario by considering the additional floorspace requirements that may arise from increased air traffic activity at Biggin Hill airport.
- Scenario 3: Past Development Rates: This scenario projects forward past commercial development rates using data from Authority Monitoring Reports (AMR) and the London Development Database.
- Scenario 4: 'Supressed' Industrial Demand: This scenario considers the impact of higher levels of employment growth from the industrial sector on floorspace requirements using the British Property Federation's Supressed Demand methodology.

4.2 The outputs from these scenarios are used to identify a 'synthesis' forecast to form the basis of future planning. It is important to note that each scenario has limitations and careful thought has been put into how appropriate each is to local circumstances.

Scenario 1: Labour Demand

4.3 The first scenario, which focuses on labour demand, uses employment projections to determine future employment space requirements. While there are inherent limitations of using projections of this nature, particularly in the context of ongoing changes to the economy, they are widely recognised as valuable to indicate the broad scale and direction of future economic growth.

4.4 The first projection draws on Experian's latest *Local Market Forecasts* (April 2023) - these provide overall employment growth figures for Bromley which factor in demographic trends and projections that are consistent with those used by the Department for Levelling Up, Housing and Communities (DLUHC). They also provide employment projections for 38 economic sectors which align to Standard Industry Classification (SIC) codes, allowing figures to be translated directly into employment floorspace and land requirements for specific use classes.

4.5 The second projection draws on the GLA's borough-level *Employment Projections* (2022) as set out in their *London Long Term Labour Market Projections* (2022)[25]. As stated in the accompanying report *"…projections are based on historic productivity trends and assumptions about the future path of economic output… [B]orough-level projections are also informed by plans for increases in employment site capacity".*

4.6 While the GLA's projections provide overall employment growth figures for Bromley they do not, however, break this down by sector which means they cannot be directly translated into employment floorspace and land requirements. To overcome this total employment growth figures have been translated into the 38 categories used by Experian based on the share of employment growth within each sector for each year of the Experian forecast.

4.7 For both sets of projections the detailed sector breakdown is used as the basis for aggregating groups of activity into land use types (i.e. EG(i)/(ii) office, B2/EG(iii) general industrial and B8 distribution). Employment growth figures for each use type are then used to determine additional employment floorspace requirements by use type based on employment density assumptions from the latest Homes and Communities Agency (HCA) *Employment Density Guide* (2015) and our understanding of the nature of current and likely future economic activity in the borough:

- EG(i)/(ii) (office) – 10 sqm per employee (NIA). This density reflects the mix of professional, scientific, technical, financial/insurance and administration activities that underpin Bromley's current economy and are expected to drive future growth.
- B2/EG(iii) (general industrial) – 36 sqm per employee (GIA). This reflects the on-going demand for light industrial space and provides a reasonable mid-point estimate for future workshop and studio requirements.

[25] Greater London Authority, London Long Term Labour Market Projections (2022).

- B8 (warehousing) – 77 sqm per employee (GEA). This reflects the borough's future and current role as a location for storage, distribution and final mile activities associated with the borough's position on the A20 and the ability to service much of South and Inner London from this location.

Experian Labour Demand Scenario

4.8 As shown in Figure 19, Experian forecast that there will be a net increase of **+7,800** FTE jobs in Bromley between 2022 and 2040 which translates to a **+9%** change versus the baseline. An uneven level of employment growth is expected across the Experian sectors – those that are expected to see the greatest growth include:

- Professional Services (**+2,800** FTE jobs).
- Administration and Support Services (**+1,800** FTE jobs).
- Health (**+800** FTE jobs).
- Computing and Information Services (**+700** FTE jobs).
- Accommodation and Food Services (**+700** FTE jobs).
- Residential Care and Social Work (**+600** FTE jobs).
- Real Estate (**+500** jobs).
- Recreation (**+400** FTE jobs).
- Retail (**+200** FTE jobs).

4.9 These forecasts underline the importance of private sector activity to Bromley's current and future economy reflecting its attractiveness to both office and industrial occupiers – strategic advantages include the proximity of the A20/M25, the borough's public transport connectivity into Central London and the breadth and depth of the labour pool.

4.10 Despite the stagnation and/or decline of some important private sector industries in Bromley in recent years (see Table 6), these forecasts indicate that several office and industrial sectors are expected to see a recovery over the next couple of decades (e.g. Professional Services, Computing and Information Services and Real Estate). While office-based activity is expected to be the main driver of future employment growth, there are several industrial sectors that will also need to be accommodated (e.g. Specialised Construction, Wholesale and 'Other' Manufacturing).

4.11 These forecasts also underline the impact of the expansion of the borough's population in driving economic growth, with sectors that are required to serve a larger resident population among growth areas (i.e. Health, Recreation and Residential Care).

4.12 In contrast, the sectors showing the greatest projected decline over the period include 'Other' Private Services (**-300** FTE jobs), Public Administration & Defence (**-200** FTE jobs), Education (**-200** FTE jobs), Printing and Recorded Media (**-100** FTE jobs), Utilities (**-100** FTE jobs), Construction of Buildings (**-100** FTE jobs) and Finance (**-100** FTE jobs). A large number of sectors are not expected to see any employment change including Pharmaceuticals, Chemicals, Media Activities and Telecoms – these have not historically been important or prominent industries in Bromley.

4.13 Translating this data into broad use categories it is clear that around **56%** of employment growth will be in sectors that require office (EG(i)/(ii)), general industrial (B2/EG(iii)) or warehousing (B8) floorspace between 2021 and 2043 – these are traditionally grouped under the banner of 'B class space' based on the old Use Class Order. This translates to **+4,911** FTE jobs distributed across the following space types:

- EG(i)/(ii) (office) – **+4,397** FTE jobs.
- B2/EG(iii) (general industrial) – **+428** FTE jobs.
- B8 (warehousing) – **+86** FTE jobs.

Using the Employment Density assumptions previously discussed this results in a need to provide an additional **+66,006 sqm** of 'B Class space' to 2040, driven by a requirement for additional office, general industrial and warehousing space (see Figure 20):

- EG(i)/(ii) (office) – **+43,972** sqm.
- B2/EG(iii) (general industrial) – **+15,394** sqm.
- B8 (warehousing) – **+6,640** sqm.

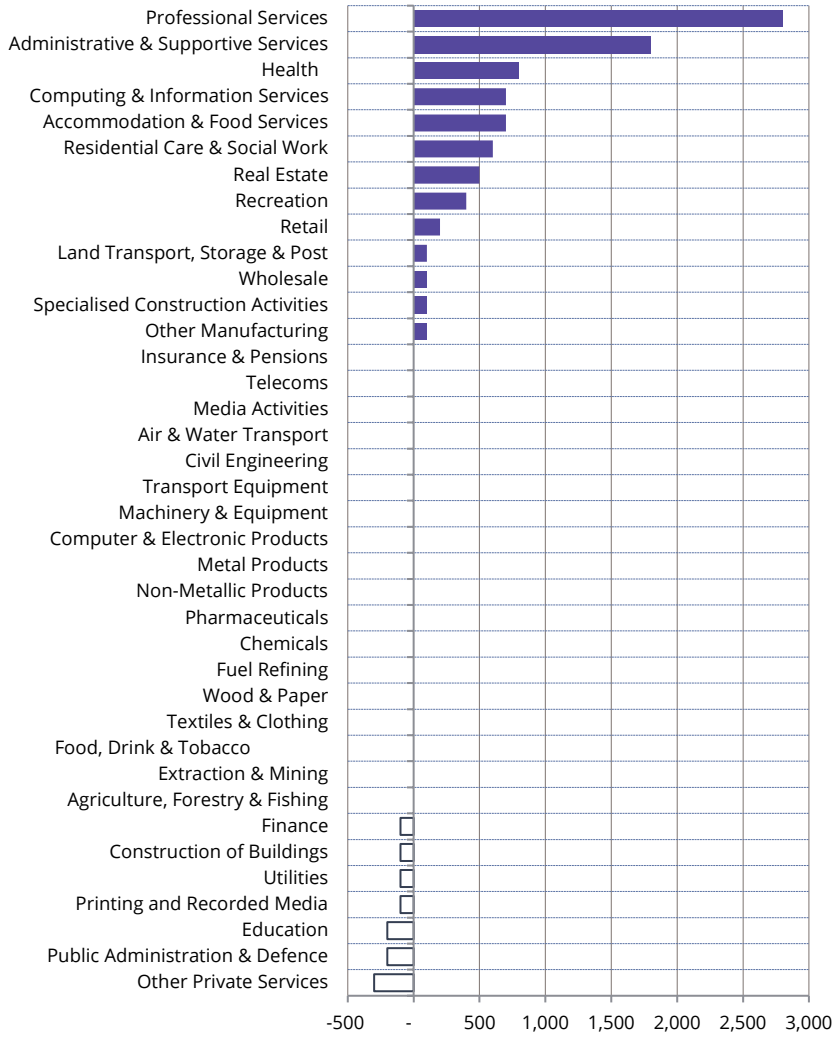


Figure 19 Experian Employment Projections by Sector (2022 2040)
Source: Experian 2023

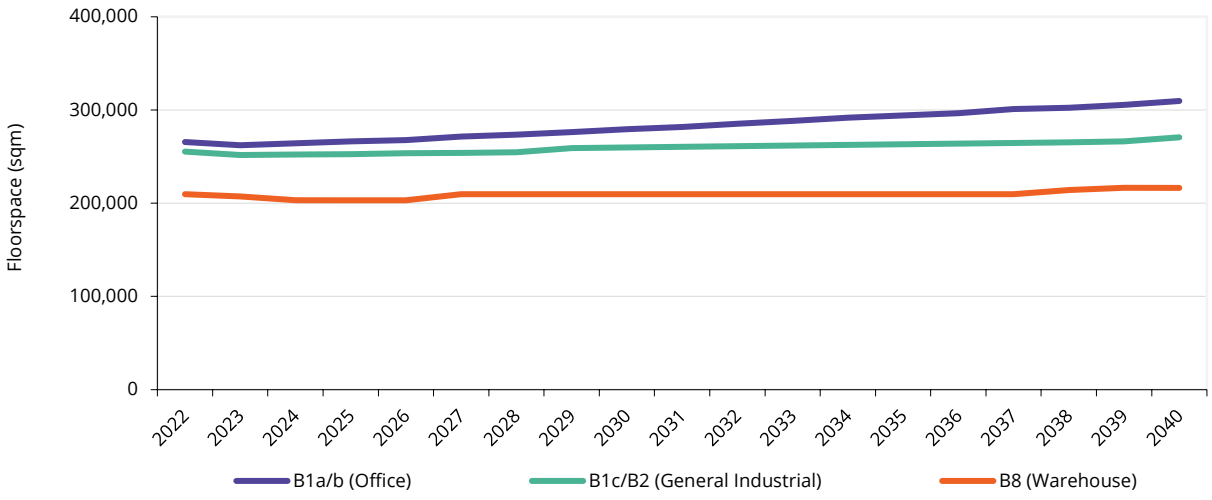


Figure 20: Experian Base Forecast for Office (EG(i)/(ii)), General Industrial (B2/EG(iii)) and Warehousing (B8) Floorspace (Old B Class).
Source: Experian and Avison Young, 2023

GLA Labour Demand Scenario

4.14 In contrast to Experian, the GLA forecasts indicate that there will be a net increase of **+10,200** FTE jobs in Bromley between 2022 and 2040 which translates to a **+8%** change against the baseline. Following the translation of these figures to different sectors using proportions from Experian, it is evident that around **6,530** of these FTE jobs will be in sectors that require office (EG(i)/(ii)), general industrial (B2/EG(iii)) or warehousing (B8) floorspace – this equates to:

- EG(i)/(ii) (office) – **+5,880** FTE jobs.
- B2/EG(iii) (general industrial) – **+547** FTE jobs.
- B8 (warehousing) – **+103** FTE jobs.

4.15 When considered against Employment Density assumptions this equates to a need to provide an additional **+86,416** sqm of 'B Class space' between 2022 and 2040 (see Figure 21) broken down as follows:

- EG(i)/(ii) (office) – **+58,797** sqm.
- B2/EG(iii) (general industrial) – **+19,683** sqm.
- B8 (warehousing) – **+7,936** sqm.

4.16 As set out in Table 18 below the Experian and GLA projections lead to slightly different conclusions. This might be because the GLA projections take into consideration expected increases in future employment floorspace provision as identified in planning policy.

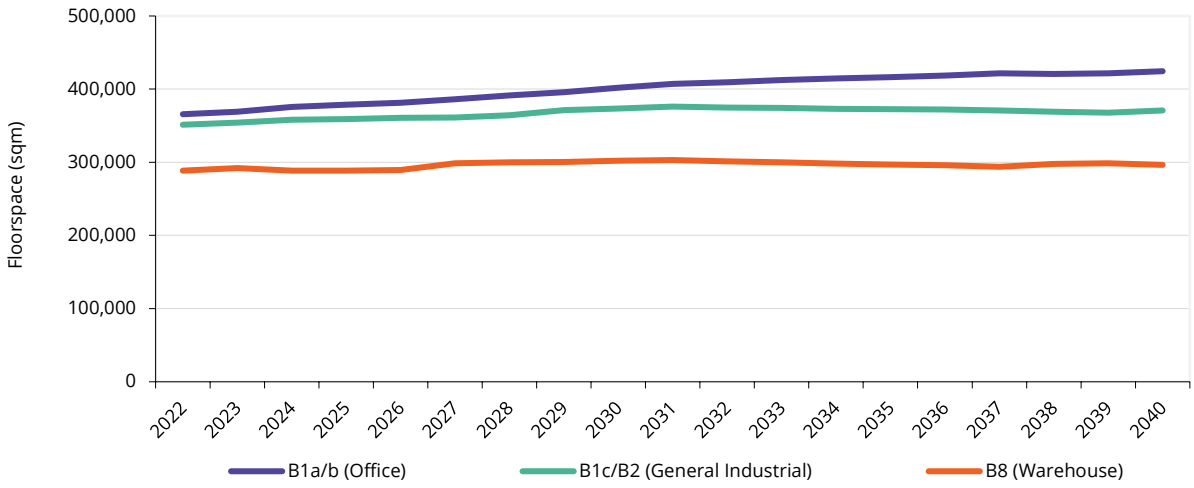


Figure 21: GLA Base Forecast for Office (EG(i)/(ii)), General Industrial (B2/EG(iii)) or Warehousing (B8) Floorspace (Old B Class).

Source: GLA Economics and Avison Young, 2022

Table 17: Base Floorspace Projection Results (2022-2040)

	Constant		Experian		GLA	
	Employment Density	Plot Ratio	Jobs (FTE)	Floorspace (sqm)	Jobs (FTE)	Floorspace (sqm)
EG(i)/(ii) (office)	10	2	+4,397	+43,972	+5,880	+58,797
B2/EG(iii) (general industrial)	36	0.4	+428	+15,394	+547	+19,683
B8 (warehousing)	77	0.4	+86	+6,640	+103	+7,936
Total	**N/A**	**N/A**	**+4,911**	**+66,006**	**+6,529**	**+86,416**

Source: Experian, GLA Economics & Avison Young

Scenario 2: 'Enhanced' Airport Driven Labour Demand

4.17 The second scenario considers the additional floorspace requirements that may arise from increased air traffic activity at Biggin Hill Airport – one of Bromley's most important economic anchors.

4.18 As set out in Annex 1 the Airport currently hosts **741** 'On-Airport' FTE jobs and a further **679** 'Off-Airport' jobs within the neighbouring Biggin Hill Trading Estate, Concorde Business Centre and Formula One Management. It is estimated that the supply chain spending of both 'On-Airport' and 'Off-Airport' businesses and the wage spend of their employees supports between **340** and **720** additional indirect and induced FTE jobs.

4.19 The Airport has undergone significant development and renovation activity in recent years leading to total Air Traffic Movements (ATMs) of around 46,000 per annum which is similar to comparative private airports around London (e.g. Brighton City Airport 40,000 per annum; Farnborough 30,000 per annum; Oxford 50,000 per annum). Over the next few years it is forecast that the number of ATMs will increase by **+8,653** to **54,750** which represents an annual increase of **+2,163** ATMs[26]. If this annual increase continues to 2030, which is conceivable based on current capacity, historic trends and future ambitions, the number of ATMs would increase by **+10,816** to **56,913** ATMs per annum.

4.20 If this occurs it is likely to create additional direct 'On-Airport' employment as the number of jobs at an airport generally increases in line with passenger numbers and/or freight tonnage. This is because additional ATMs can create demand for a wide range of services including cleaning, maintenance, management, security and administration. As set out in Annex 1, using multipliers from previous studies it is estimated that an increase of +10,816 ATMs could increase direct 'On Airport' employment by around **145** FTEs. While this is likely to generate demand for employment floorspace most if not all of this will be met on the existing Airport site.

4.21 This employment will, however, generate indirect and induced effects which *are* likely create demand for 'Off-Airport' employment floorspace as most supply chain jobs are likely to be located close to the airport given the preference of supply chain businesses in the aviation sector to cluster around airports – as set out in Annex 1 it is estimated that up to **135** induced and indirect FTE jobs will be supported based on multipliers from previous studies. Most of these jobs are likely to be 'industrial' in nature given the nature of the aviation supply chain.

4.22 If 75% of these induced and indirect FTEs are retained locally it is estimated that this would generate demand for an additional **+5,721** sqm of general industrial (B2/EG(iii)) and warehousing (B8) space using the

[26] Biggin Hill Airport Noise Action Plan 2015-2020, London Borough of Bromley

employment density assumptions applied in Scenario 1[27]. If this is added to the 'base' labour demand projections from Experian and the GLA:

- Experian demand for general industrial (B2/EG(iii)) and warehousing (B8) space increases from +22,034 sq m to **+27,755** sqm by 2040.
- GLA demand for general industrial (B2/EG(iii)) and warehousing (B8) space increases from +27,619 sqm to **+33,340** sqm by 2040.

4.23 These figures are likely to represent the minimum amount of additional floorspace need that will be generated by the Airport in the future as Biggin Hill Airport Limited have ambitions plans for its expansion. This is set out in their recently published *Biggin Hill Airport: A Strategic Centre for Sustainable Aviation* (2023) and draft *Economic Impact of Biggin Hill Airport* (2023) document which, as set out in Annex 1, estimate that direct 'On-Airport' employment will increase by **+1,960** to **+3,240** FTEs if all their proposals come forward and a further **1,060** and **1,750 FTEs** induced and direct FTEs will be supported.

4.24 If it is again assumed that 75% of these induced and indirect FTEs are retained locally it is estimated that this would generate demand for **>88,000** sqm of general industrial (B2/EG(iii)) and warehousing (B8) space in the borough based on the employment density assumptions previous used. This is likely to represent the maximum amount of additional floorspace that will supported by the Airport in the future as it is not known which proposals, if any, will come forward particularly as policy may need to change to accommodate some of their proposed development. Due to the status of these proposals it is not recommended that these figures are taken forward into policy at this point, though this document could be updated once further clarity and confirmation on the proposed schemes come forward.

4.25 The amount of additional 'On Airport' employment floorspace required has not been quantified here as the focus of this study is on the borough's traditional 'B-class' employment sites. It is assumed that any direct employment generated by development or changes in the operation of the Airport will be accommodated on site and that the Airport is unlikely to absorb any of the borough's wider employment floorspace demand given its current designation and function. It is, however, recognised that the Airport plays an important role in the borough's economy and future development on-site could catalyse economic growth and wider agglomeration effects benefitting the borough and its residents.

Scenario 3: Past Development Rates

4.26 The third scenario projects forward past employment floorspace completion rates to determine future floorspace requirements. As they reflect market demand and actual development patterns on the ground, these rates can provide a reasonable basis for informing future land needs particularly when analysed over several years as this should even out demand fluctuations over a business cycle[28].

Table 18: Employment Space Completions (2009-2022 Financial Years)

	Total Net Completions (SQM)	Average Net Annual Completions (SQM)
B1	-14,557	-1,040
B2	-3,303	-236
B8	+22,947	+1,639
Total	**+5,087**	**+363**

Source: London Development Database, London Borough of Bromley, Avison Young 2023

[27] It has been assumed that 50% of jobs require general industrial (B2/EG(iii)) space and 50% require warehousing space (B8).
[28] The first COVID-19 lockdown may have influenced completion figures during 2020. We assume that most paused activity will have resumed in 2021 and 2022.

4.27 Information on past completion rates by use class between 2009 and 2022 was analysed using data from both the London Development Database and LBB[29]. As shown in Table 18 above, net completions for B1, B2 and B8 uses totalled **+5,087** sqm between 2009 and 2019, which translates to **+363** sqm per year. There has, however, been significant differences in development rates across the three broad use classes over this period:

- B1: **-14,557** sqm in total or **-1,040** sqm each year on average.
- B2: **-3,303** sqm in total or **-236** sqm each year on average.
- B8: **+22,947** sqm in total or **+1,639** sqm each year on average.

4.28 If these figures are extended over the same period as the other scenarios (2022-2040) this would lead to a total net employment floorspace requirement of **+6,534** sqm which is much lower than identified for the other scenarios. This equates to the following requirement for each broad use class category by 2040 (see Table 19):

- B1: **-18,720** sqm by 2040.
- B2: **-4,248** sqm by 2040.
- B8: **+29,502** sqm by 2040.

4.29 If these figures are translated to the use class categories used in this study, using *current* proportions of B1a, B1b and B1c floorspace in Bromley as a basis[30], the results are as follows:

- B1a/b Office (EG(i)/(ii)): **-16,974** sqm by 2040.
- B1c/B2 General Industrial (B2/EG(iii)): **-5,994** sqm by 2040.
- B8 Warehousing: **+29,502** sqm by 2040.

4.30 Using the same employment densities used for previous scenarios it is possible to estimate that this additional floorspace would lead to a loss of in the region of **-1,480** jobs under this scenario which is equivalent to around -82 jobs per year.

Table 19: Projected Net Employment Floorspace Requirement (2022-2040)

	Assumed Annual Net Floorspace Change (SQM)	Total Net Floorspace Change Over 18 Years (SQM)
EG(i)/(ii) (office)	-943	-16,974
B2/EG(iii) (general industrial)	-333	-5,994
B8 (warehousing)	+1639	+29,502
Total	**+363**	**+6,534**

Source: LBB, London Development Database and Avison Young, 2023

Scenario 4: 'Supressed' Industrial Demand

4.31 The projections set out in the 'base' labour demand scenario provide a useful basis for estimating future employment space requirements, but are limited in two ways:

[29] Records from 2009 to 2019 were drawn from the London Development Database whereas records from 2019 to 2023 were drawn from LBB monitoring data.
[30] Based on data by niche use class from LBB and the VOA.

1. They are calibrated to the nature and scale of the existing economy of an area and therefore cannot consider opportunities to address past weaknesses.
2. They cannot respond to the nature of place and therefore do not consider the ability of an area to attract new economic activity based on its locational attributes.

They are, in essence, backwards looking meaning that they cannot always keep pace with the scale and nature of change experienced by some sectors and places.

4.32 This has been particularly problematic for the logistics and distribution sector which has experienced unprecedented growth over the last decade which, as highlighted in Figure 22, has not been anticipated by trend-based economic projections. This has meant that the 'traditional' approach to estimating employment floorspace requirements may have underestimated the amount of general industrial (B2/EG(iii)) and warehousing (B8) floorspace and land required in different places across the country over the last decade. While economic forecasts have started to adjust to the continued growth of the sector, they still do not fully reflect 'true' demand as sector growth has historically been constrained by limited supply in many locations.

4.33 This is widely recognised at the national level and it is accepted that as demand for industrial and warehousing space has increased the provision of additional floorspace and land has not kept pace – this means that demand that may have arisen in some areas has been 'supressed' by a lack of space. In response to this the British Property Federation (BPF) has developed a methodology to assess the level of demand that could exist in an area where supply is considered to 'supress demand'. While this approach is not typically used for Local Plans, Bromley has significant locational advantages for general industrial (B2/EG(iii)) and warehousing (B8) type activity, and the NPPF recognises that trend-based projections are not sufficient on their own to predict future demand, so it has been applied to drive this scenario.

4.34 The starting point for this has involved analysing the annual availability of industrial and warehousing floorspace in the borough as a proportion of total floorspace over the last ten years – this is important because available supply is required to allow businesses to move into new space. Where the availability rate is consistently below 8%, a rate (also known as the 'equilibrium rate') that is considered to indicate a 'healthy' relationship between demand and supply, it is assumed that demand is being constrained by a lack of supply.

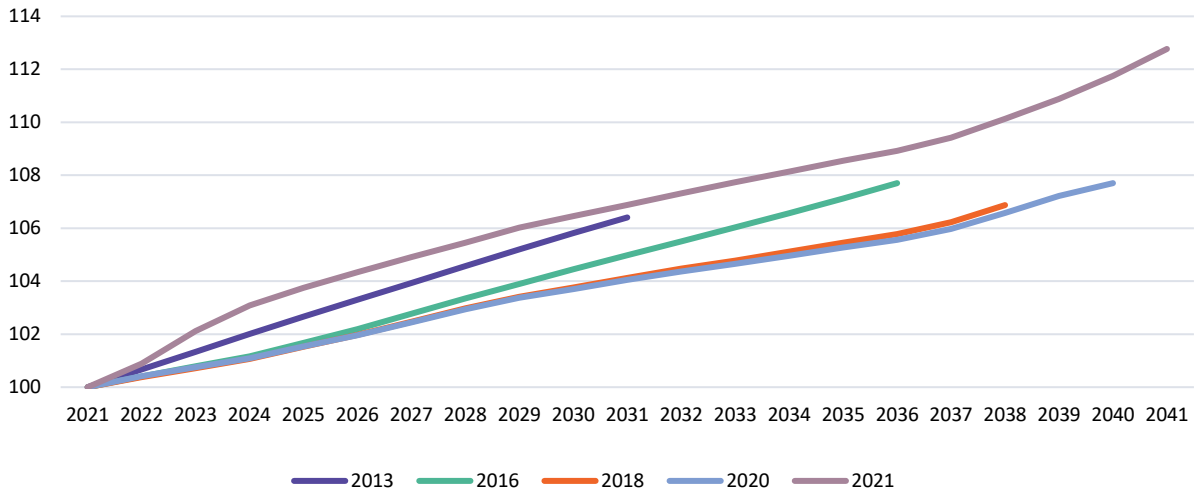


Figure 22: Comparison of Different Employment Growth Forecasts for Land Transport, Storage and Post (2021 2041).

Source: Experian and Avison Young, 2022

4.35 The next step has been to calculate how much additional supply the borough needed to meet the 8% equilibrium rate for each year analysed. An average across the period has been determined to understand the amount of additional supply required in a typical year to achieve a 'healthier' market.

4.36 The ratio between this figure and average net absorption for the same period was then used to determine the level of 'supressed demand' that has been experienced in a typical year in the borough over the last ten

years – this represents the quantum of space that may have been occupied by businesses had it existed. Adjusting for net absorption, a measure of the amount of floorspace let versus the amount vacated, is important to account for the proportion of available space that is absorbed in a typical year.

4.37 Finally the average annual 'supressed demand' figure has been added to the historic average annual delivery of general industrial (B2/EG(iii)) and warehousing (B8) floorspace using the London Development Database and LBB data underpinning the previous scenario[31]. This, according to the BPF, provides a much more representative estimate of future floorspace demand for general industrial (B2/EG(iii)) and warehousing (B8) floorspace than the 'base' labour demand scenario.

Table 20: Supressed Demand Floorspace Projections Results for general industrial (B2/EG(iii)) and warehousing (B8) space

	Total Floorspace (SQM)	Floorspace Net Absorption (SQM)	Floorspace Delivered (SQM)	Available Floorspace (SQM)	Floorspace Availability Rate (%)	Net Absorption as % of Available Floorspace	Floorspace Required to meet 8% Equilibrium
2022	391,502	10,150	7,494	26,165	6.7%	39%	5,155
2021	384,008	12,689	3,319	34,775	9.1%	36%	-4,054
2020	380,689	-93	-	41,022	10.8%	0%	- 10,566
2019	370,985	4,752	-	27,992	7.5%	17%	1,687
2018	347,285	241	-	26,763	7.7%	1%	1,020
2017	344,754	-2,123	-	23,345	6.8%	-9%	4,236
2016	344,754	8,304	-	6,755	2.0%	123%	20,825
2015	344,754	2,316	5,113	16,189	4.7%	14%	11,391
2014	339,641	9,268	-	16,152	4.8%	57%	11,019
2013	339,641	-1,199	-	33,109	9.7%	-4%	-5,938
Change 2013-2022	51,861	44,305	15,926	-6,944			
Average Annual	5,186	4,430	1,593		7.0%	27%	4,148
Annual 'Suppressed' Demand							1,140
Annual Delivery of General Industrial/Warehousing							1,306
'Suppressed' Demand 2022-2040							**20,520**
Annual Delivery of General Industrial/Warehousing Demand 2022-2040							**23,508**
Total 'Suppressed' and Annual Delivery of General Industrial/Warehousing 2022-2040							**44,028**

Source: CoStar, Avison Young and BPF, 2023

4.38 The results of the analysis are set out in Table 20 above which illustrates that the borough had a level of availability below the 'equilibrium rate' in all but three of the last ten years with an annual average of 7%. While this is only marginally below the 'equilibrium', the approach indicates that the market has been undersupplied by an average of 4,148 sqm over the last ten years, resulting in a supressed demand of 1,140 sqm each year, or **+20,520** sqm in total when projected to 2040. When this is added to forward projections of historic annual delivery of industrious floorspace the calculations indicate a need to provide +44,028 sqm of general industrial (B2/EG(iii)) and warehousing (B8) floorspace. This is more than both the Experian and

[31] Historical annual delivery of floorspace has been used as it better illustrates 'additional' demand than net absorption because it shows net change in delivery instead of take up of new, existing and/or vacant floorspace. This is a consistent logic with the supressed demand methodology which seeks to the additional space required to reach a 'healthy' vacancy rate.

GLA labour demand scenarios identify as being required by 2040 (+22,034 sqm and +27,619 sqm respectively).

Employment Land Requirements

4.39 The additional employment floorspace figures that emerge from the four scenarios are set out in Table 21 below.

Table 21: Summary of Additional Floorspace Needs by Scenario (SQM) (2022-2040)

Scenario 1: Labour Demand (Experian)	+43,972	+15,394	+6,640	**+66,006**
Scenario 1: Labour Demand (GLA)	+58,797	+19,683	+7,936	**+86,416**
Scenario 2: 'Enhanced' Airport Driven Labour Demand (Experian)	As Per Base	+27,755		**+71,727**
Scenario 2: 'Enhanced' Airport Driven Labour Demand (GLA)	As Per Base	+33,340		**+92,137**
Scenario 3: Past Development Rates	-16,974	-5,994	+29,502	**+6,534**
Scenario 4: 'Supressed' Industrial Demand	N/A	+44,028		**N/A**

Source: Experian, GLA, Avison Young, ONS, British Property Federation (BPF), Co-Star, LBB, HCA

4.40 The final step is to translate these into employment land requirements. This is done by converting EG(i)/(ii) (office) and B2/EG(iii) (light industrial) floorspace figures from NIA and GIA respectively to GEA by increasing the floorspace values by 20% and 5%, before applying plot ratio assumptions to the GEA figures – plot ratios provide a measure of the quantum of land assumed to be required to accommodate the floorspace.

4.41 The plot ratios used in this assessment reflect the standard site coverage of development with allowance for parking, access, servicing etc and in the case of offices the likely form of more urban town centre provision compared to business park typologies:

- EG(i)/(ii) (office) – 2.
- B2/EG(iii) (general industrial) – 0.4.
- B8 (warehousing) – 0.4.

4.42 The results of this analysis are set out Table 22 below. This shows that:

- EG(i)/(ii) (office) land requirements vary from **-1 ha** to **+3.5 ha** of employment land.
- B2/EG(iii) (general industrial) requirements vary from **-1.6 ha** to **+11.6 ha** of employment land.
- B8 (warehousing) requirements vary from **+1.7 ha** to **+11.6 ha** of employment land.

Table 22: Additional Employment Land Need by Scenario (Ha) (2022-2040)

	EG(i)/(ii) (office)	B2/EG(iii) (general industrial)	B8 (warehousing)	Total
Scenario 1: Labour Demand (Experian)	2.6	4.0	1.7	**8.3**
Scenario 1: Labour Demand (GLA)	3.5	5.2	2.0	**10.7**
Scenario 2: 'Enhanced' Airport Driven Labour Demand (Experian)	2.6	7.3		**9.9**
Scenario 2: 'Enhanced' Airport Driven Labour Demand (Experian GLA)	3.5	8.8		**12.3**

Scenario 3: Past Development Rates	-1.0	-1.6	7.4	**4.8**
Scenario 4: 'Supressed' Industrial Demand	N/A	11.6		**11.6**

Source: Experian, GLA, Avison Young, ONS, British Property Federation, Co-Star, LBB

Synthesis Scenario

4.43 Each scenario presented in this chapter sets out the potential impact of changes to Bromley's economy on its future employment floorspace and land requirements. While they ultimately forecast different levels of demand, the level of variation is not disproportionate so it is recommended that a range is taken forward for consideration in policy terms. All forecasts are considered in this, bar Scenario 3: Past Development rates as it is more likely to reflect Bromley's historically constrained land supply and market than levels of past and future demand. On this basis:

- Between **+43,972** and **+58,797** sqm of office (EG(i)/(ii)) floorspace and **+2.6** and **+3.5** Ha of land is required by 2040.
- Between **+22,034** and **+44,028** sqm of general industrial (B2/EG(iii)) and warehousing (B8) floorspace and **+5.7** and **+11.6** Ha of land is required by 2040.

4.44 If the figures for general industrial (B2/EG(iii)) and warehousing (B8) are broken down by the proportional change expected by the 'base' Experian projection (70:30) it translates to:

- Between **+15,394** and **+30,760** sqm of floorspace and **+4** and **+8.1** Ha of land is required for general industrial (B2/EG(iii)) uses by 2040.
- Between **+6,640** and **+13,268** sqm of floorspace and **+1.7** and **+3.5** of land is required for warehousing (B8) uses by 2040.

4.45 The lower ends of these ranges represent the minimum employment floorspace and land to plan for as part of the refreshed *Local Plan.*

Table 23: Summary of Additional Floorspace and Land Requirements from Synthesis Scenario (2022-2040)

	Floorspace (SQM)	Land (Ha)
EG(i)/(ii) (office)	+43,972 to +58,797	+2.6 to +3.5
B2/EG(iii) (general industrial)	+15,394 to +30,760	+4 to +8.1
B8 (warehousing)	+6,640 to +13,268	+1.7 to +3.5
Total	**+66,006 to +102,825**	**+8.3 to +15.1**

'Best Practice' Adjustments

4.46 Safety margins, also known as flexibility factors, are generally applied to employment floorspace and land requirements to build additional headroom into need figures. This ensures that employment forecasts are based on more than economic growth 'predictions' and better reflect the fluid nature of land allocations.

4.47 The first factor (known as 'churn') makes an allowance for the fact that the locational and premises needs of businesses change over time requiring them to move or acquire new sites for development. For this to happen there needs to be a certain level of vacant floorspace and land to allow businesses to expand and/or develop sites ('frictional vacancy').

4.48 To allow for this the equivalent of two years of annual average past net completions has been added to the preferred scenario using data from the London Development Database[32]– this reflects the fact that it typically takes around two years to secure planning, undertake site preparation and complete construction after a site has been purchased. This adjustment, in essence, provides the 'frictional vacancy' required to allow market and relocation chains to operate.

4.49 The figures driving this are set out in Table 24 and Table 25 below – the former sets out the churn allowance for broad uses classes and the latter translates these to the use categories deployed in this study using *current* proportions of B1a, B1b and B1c floorspace in Bromley as a basis[33].

Table 24: Allowance for 'Churn' by Broad Use Class: Employment Space Net Completions (Positive) (SQM)[34]

Year	Change in B1	Change in B2	Change in B8	Total
2009	0	+2,993	+55	+3,048
2010	+1,157	0	+4,080	+5,237
2011	0	0	+1,134	+1,134
2012	0	0	0	0
2013	0	0	+2,116	+2,116
2014	+1,173	0	0	+1,173
2015	0	+4411	0	+4,411
2016	0	0	0	0
2017	0	0	0	0
2018	+2,731	0	0	+2,731
2019	0	0	0	0
Total	**+5,061**	**+7,404**	**+7,385**	**+19,850**
Annual Average	+460	+673	+671	+1,805
Allowance for 'Churn'	**+920**	**+1,346**	**+1,343**	**+3,609**

Source: London Development Database; Avison Young, 2023

Table 25: Translation of 'Churn' Allowance to More Specific Use Class Categories (SQM)

Allowance for EG(i)/(ii) (office)	Allowance for B2/EG(iii) (general industrial)	Allowance for B8 (warehousing)	Total
+834	+1,432	+1,343	**+3,609**

Source: London Development Database; LBB; Avison Young, 2023

4.50 The second factor (known as 'windfall') considers the fact that a proportion of designated employment land will not be entirely used by 'B-class' employment moving forward[35]. Uses such as recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances, and where appropriate, be located on employment land. Sectors such as healthcare, education, hotels and leisure can

[32] It has only been possible to use data from the London Development Database which covers 2009 to 2019 to undertake this analysis. While more up-to-date completion data from LBB was used in Scenario 3: Past Development Rates, this only shows the *overall* change between 2019 to 2023 by use class and does not break figures down by year (i.e. 2019, 2020, 2021 and 2022). Having data for each year is important to isolate the years that have seen a net *increase* in employment floorspace as these are the figures that are used to drive churn calculations.

[33] As per Scenario 3, this allocation have been done using data on more granular use class from LBB and the VOA. The figures for B1 have been split 90.26% to B1A, 0.41% B1B and 9.33% B1C.

[34] The London Development Database offers the best complete data source on net completions and losses in Bromley at present. We recommend that LBB start to monitor completions and losses on annual basis as part of their Local Plan monitoring, and look to update these figures when sufficient information is available.

[35] i.e. EG(i)/(ii) (office), B2/EG(iii) (general industrial) and B8 (warehousing).

also be found on some employment sites as can residential uses following the extension of Permitted Development Rights.

4.51 To estimate the amount of land that may be used for non 'B-class' activities in the future, historic net losses of employment land to other uses has been used based on data from the London Development Database[36]. The annual average loss of space by broad use class over the period considered is projected over the new *Local Plan* period (2023-2041) to estimate how much floorspace and land may be lost to other uses (see Table 26)[37] and should therefore be 'allowed for' in need figures. This has then been translated to the more granular use classes considered in this study using current proportions of B1a, B1b and B1c floorspace in Bromley as a basis in line with the process outlined in Scenario 3 (see Table 27)[38].

4.52 It is important to note that only floorspace that is truly lost to 'B Class' employment activity has been included within the windfall allowance rather than floorspace that has transferred between 'B class' land uses (i.e. land that changes from B2 activity to B8) - 'net' change figures from the datasets have been used to ensure that this is the case.

Table 26: Allowance for 'Windfall': Employment Space Net Losses (Negative) (SQM)[39]

Year	Change in B1	Change in B2	Change in B8	Total
2009	-686	0	0	-686
2010	0	0	0	0
2011	-227	0	0	-227
2012	0	0	0	0
2013	-545	0	0	-545
2014	0	0	-3,471	-3,471
2015	-1,860	0	0	-1,860
2016	-3,751	0	0	-3,751
2017	0	0	-1,260	-1,260
2018	0	0	0	0
2019	0	0	0	0
Total	**-7,069**	**0**	**-4,731**	**-11,800**
Annual Average	-643	0	-430	-1,073
Allowance for 'Windfall'	**+11,567**	**0**	**+7,742**	**+19,309**

Source: London Development Database; Avison Young, 2023

Table 27: Translation of 'Windfall' Allowance to More Specific Use Class Categories (SQM)

Allowance for EG(i)/(ii) (office)	Allowance for B2/EG(iii) (general industrial)	Allowance for B8 (warehousing)	Total

[36] As with churn it has only been possible to use data from the London Development Database which covers 2009 to 2019 to undertake this analysis. While more up-to-date completion data from LBB was used in Scenario 3: Past Development Rates, this only shows the overall change between 2019 to 2023 by use class and does not break figures down by year (i.e. 2019, 2020, 2021 and 2022). Having data for each year is important to isolate the years that have seen a net decreased in employment floorspace as these are the figures that are used to drive windfall calculations.

[37] Again median figures are used instead of mean annual figures to determine the 'windfall' allowance to smooth out years with anomalously high figures (e.g. 2014/15).

[38] As per Scenario 3, this allocation have been done using data on more granular use class from LBB and the VOA. The figures for B1 have been split 90.26% to B1A, 0.41% B1B and 9.33% B1C. The figures for B1C are accounted for under B2/EG(iii).

[39] The London Development Database offers the best complete data source on net completions and losses in Bromley at present. We recommend that LBB start to monitor completions and losses on annual basis as part of their Local Plan monitoring, and look to update these figures when sufficient information is available.

+10,488	+1,079	+7,742	**+19,309**

Source: London Development Database; LBB; Avison Young, 2023

4.53 Both approaches are limited as they are backward looking and do not pick up future changes to how land will be used. This data is, however, useful on proviso that it is monitored each year and new figures considered to give a longer-term projection of losses of employment land. This could have a considerable effect on future employment land needs, depending on employment land losses in each year.

4.54 The impact of these adjustments are set out in Table 28 below. These changes shift the synthesis scenario's figures significantly:

- Between **55,294** and **70,119** sqm of floorspace and **3.3** and **4.2** Ha of land is required for office (EG(i)/(ii)) uses by 2040 allowing for both churn and windfall.
- Between **17,905** and **33,271** sqm of floorspace and **4.7** and **8.7** Ha of land is required for general industrial (B2/EG(iii)) uses by 2040 allowing for both churn and windfall.
- Between **15,724** and **22,352** sqm of floorspace and **3.9** and **5.6** Ha of land is required for warehousing uses (B8) by 2040 allowing for both churn and windfall.

Table 28: Summary of Additional Floorspace Required from Synthesis Scenario Allowing for 'Safety Margin' (2022-2040) (SQM)

	Synthesis Scenario	Synthesis Scenario, including Churn allowance	Synthesis Scenario, including Churn and Windfall allowance
Lower End of Range			
EG(i)/(ii) (office)	43,972	44,806	55,294
B2/EG(iii) (general industrial)	15,394	16,826	17,905
B8 (warehousing)	6,640	7,983	15,724
Total	66,006	69,615	88,924
Higher End of Range			
EG(i)/(ii) (office)	58,797	59,631	70,119
B2/EG(iii) (general industrial)	30,760	32,192	33,271
B8 (warehousing)	13,268	14,611	22,352
Total	102,825	106,434	125,743

Source: Experian, GLA, Avison Young, ONS, British Property Federation, Co-Star, LBB

Table 29: Summary of Additional Land Required from Synthesis Scenario Allowing for 'Safety Margin' (2022-2040) (Ha)

	Synthesis Scenario	Synthesis Scenario, including Churn allowance	Synthesis Scenario, including Churn and Windfall allowance
Lower End of Range			
EG(i)/(ii) (office)	2.6	2.7	3.3
B2/EG(iii) (general industrial)	4.0	4.4	4.7
B8 (warehousing)	1.7	2.0	3.9
Total	8.3	9.1	11.9

Higher End of Range			
EG(i)/(ii) (office)	3.5	3.6	4.2
B2/EG(iii) (general industrial)	8.1	8.5	8.7
B8 (warehousing)	3.5	3.7	5.6
Total	15.1	15.7	18.5

Source: Experian, GLA, Avison Young, ONS, British Property Federation, Co-Star, LBB

Sensitivity Tests

4.55 While the synthesis scenario considers demand from a range of perspectives, the employment floorspace and land projections resulting from Scenarios 1 (Labour Demand) and 2 ('Enhanced' Airport Driven Labour Demand) are driven by the application of professional judgement to national guidance and industry-accepted employment density and plot ratio figures.

4.56 The GLA has, however, recently set out locally specific employment density and plot ratio figures as part of the evidence underpinning the *London Plan* (2021) – this is based on the analysis of employment sites across the capital. To illustrate the impact of using these figures instead of the employment density and plot ratio previously set out a 'sensitivity test' has been applied to Scenario 1 and 2, and therefore part of the synthesis scenario, to illustrate the impact of changing these variables. The key changes include:

1. Increasing the employment density assumption for office-based sectors (EG(i)/(ii)) to 11.3 in line with the London Employment Sites Database's (2021) approach for Outer London.
2. Decreasing the employment density assumption for warehousing (B8) to 50 in line with the London Employment Sites Database's (2021) approach for Outer London.
3. Increasing the plot ratio assumption for general industrial (B2/EG(iii)) and warehousing (B8) to 0.45 line with the 'South Sub-Region' average for industrial space according to the London Industrial Land Supply Study (2022)[40].

Table 30 Sensitivity Test Applied to Synthesis Scenario (2022-2040)

	Floorspace (SQM)	Land (Ha)	Notes
Synthesis Scenario (Pre Sensitivity Test, not including Churn or Windfall)			
EG(i)/(ii) (office)	+43,972 to +58,797	+2.6 to +3.5	N/A
B2/EG(iii) (general industrial)	+15,394 to +30,760	+4 to +8.1	Maximum floorspace figure (blue) driven by Scenario 4 which does not rely on employment density assumptions.
B8 (warehousing)	+6,640 to +13,268	+1.7 to +3.5	Maximum figure (blue) driven by Scenario 4 which does not rely on employment density assumptions.
Total	**+66,006 to +102,825**	**+8.3 to +15.1**	**N/A**
Synthesis Scenario (Post Sensitivity Test, not including Churn or Windfall)			
EG(i)/(ii) (office)	+49,688 to +66,440	+3 to +4	N/A
B2/EG(iii) (general industrial)	+15,394 to +30,760	+3.6 to +7.2	Maximum floorspace figure (blue) driven by Scenario 4 which does not rely on employment density assumptions – this figure therefore remains constant. The land figure has changed in line with changing plot ratios.
B8 (warehousing)	+4,312 to +13,268	+1 to +3.1	Maximum floorspace figure (blue) driven by Scenario 4 which does not rely on employment density assumptions – this figure therefore remains constant. The land figure has changed in line with changing plot ratios.

[40] This is the plot ratio for sites incorporating 'core' industrial activities as defined in the London Industrial Land Supply Study.

Total	**+69,394 to +110,468**	**+7.6 to +14.3**	Floorspace figures are *higher* than the pre sensitivity scenario driven by the increase in office employment density. Land figures are, however, lower due to changing plot ratios.

Source: Experian, GLA, Avison Young, HCA

4.57 The impact of making these changes is set out in Table 30 above alongside the original figures from the synthesis scenario. This shows that the total floorspace requirement increases from between +66,006 and +102,825 sqm to **+69,394** to **+110,468** sqm while the total land requirement reduces from +8.3 to +15.1 Ha to **+7.6** to **+14.3** Ha. The increase in floorspace is primarily driven by the increasing floorspace requirement for office space as a result of changing the employment density assumptions, whereas the reduction in land requirements links to the increasing plot ratios for warehousing and general industrial.

4.58 The evidence base underpinning the *London Plan* (2021), namely the *London Industrial Land Demand Report* (2017) and *London Office Policy Review* (2017), does not adjust for windfall and churn but rather recommends adding 8% to industrial and office floorspace projections to allow for a frictional rate of vacancy and efficient market operation. Taking this approach, as seen in Table 31 below, increases the total floorspace requirement to between **+74,946** and **+119,305** sqm and the total land requirement to between **+8.2** and **+15.4** Ha.

Table 31: Synthesis Scenario Post Sensitivity Test, including 8% Uplift (2022-2040)

	Floorspace (SQM)	Land (Ha)
EG(i)/(ii) (office)	+53,663 to +71,755	+3.2 to +4.3
B2/EG(iii) (general industrial)	+16,626 to +33,221	+3.9 to +7.8
B8 (warehousing)	+4,657 to +14,329	+1.1 to +3.3
Total	**+74,946 to +119,305**	**+8.2 to +15.4**

Source: Experian, GLA, Avison Young, HCA, London Industrial Land Demand Report, London Office Policy Review

5. Supply Context: Establishing Current and Future Employment Land Supply

Chapter Summary

This chapter provides an overview of existing B class employment floorspace supply in Bromley. It summarises the results of on the ground and desk based appraisals which were undertaken for a large number of designated and undesignated employment sites across the borough. This information is used later in the report to determine whether projected demand can be met by current supply, and which sites present opportunities to increase supply via intensification and/or development.

The key messages from the on the ground appraisals include:

- There is an urgent need to enhance and diversify the borough s major office locations (e.g. Bromley South and Bromley North). While they remain suitable locations the nature and format of their existing office stock could better suit modern occupiers and the surrounding amenity offer could be stronger to better attract inward investment. Opportunities to introduce a more diverse mix of uses should be considered where they enhance the employment function of these sites. Consolidation could also help reinvigorate these office markets, for example by working with occupiers to relocate to space from other sites.
- There are several peripheral' office sites that have high vacancy rates and are not ideally located for continued office use (e.g. Mason s Hill and Enterprise House). These are candidates for re orientation and change of use, but it is recommended that other 'B class or non B class employment uses are considered ahead of residential due to the need to support economic growth locally.
- Few industrial locations were identified as having intensification opportunities as most sites are well utilised and occupied. A small handful of the borough s larger sites (e.g. Sevenoaks Way/Cray Avenue, Lower Sydenham and Biggin Hill) have some opportunities but none present significant scope for additional capacity. The main types of opportunities include infilling of open space, re development of ageing stock and retro fit of existing buildings. It is important to test this intensification potential on sites with older stock.
- Most of the borough s medium size industrial sites are well utilised and occupied (e.g. Elmers End, Klingers and Farwig Lane). These present few intensification opportunities but should be retained as they play an important role in supporting the borough s economy.
- There are a large number of small rural' designated and undesignated sites that support light industrial and agricultural type activities (e.g. Scrubs Lane, Higham Hill Farm and Tripes Business Centre). While they support the borough s economy, few present opportunities for development and intensification. Most are also difficult to access, poorly connected to public transport and are in greenbelt areas so are less than ideal for anything other than small infill development of open storage space and car parking.
- There are a small number of well located industrial sites that could be expanded to meet future demand if there was limited release of less sensitive greenbelt land (e.g. Crayfields Business/Industrial Park).

Through this research it has been possible estimate that across the sites appraised there are 31 vacant properties with around 32,300 sqm of available floorspace. By use class this equates to:

- 17 office (EG(i)/(ii)) properties, with c.20,800 sqm of available floorspace.
- 10 general industrial (B2/EG(iii)) properties, with 8,400 sqm of available floorspace.
- 4 warehousing (B8) properties, with c.3,100 sqm of available floorspace.

CoStar data indicates that there is further availability in other part of the borough as well:

- 11,700 sqm of available office (EG(i)/(ii)) floorspace.
- 1,162 sqm of available general industrial (B2/EG(iii)) floorspace.
- 650 sqm of available warehousing (B8) floorspace.

This availability may go some way to meeting future demand given the quantum available. There are, however, limitations with some of the stock that is available influencing its suitability and attractiveness for future occupation (e.g. some is in unattractive locations and some is low quality which may not be appealing to modern occupiers).

Looking to the future, the borough s development pipeline could further impact the borough s employment floorspace supply and availability. Data from LBB shows that there are a total of 16 unimplemented or in progress planning permissions for office (EG(i)/(ii)), general industrial (B2/EG(iii)) and warehousing & distribution (B8) properties in the borough which, if implemented in full, could increase employment floorspace by +20,071sqm. This activity could deliver +21,665 of warehousing (B8) floorspace and +201 sqm of office space (EG(i)/(ii)) counter balanced by the expected loss of around 1,795 sqm of general industrial space (B2/EG(iii)) if fully implemented.

Borough-Level Supply

5.1 Bromley has approximately 716,464 sqm of what is traditionally referred to as 'B-class' employment space based on the old Use Class Order (see Table 32) and roughly 186 ha of land. Much of this floorspace (45%) is office space (EG(i)/(ii)), followed by warehousing (B8) (32%) and general industrial (B2/EG(iii)) (22%). Over the last decade of available data (2012-2022) the borough's total 'B-class' employment floorspace has remained fairly steady changing from 661,364 sqm to 716,464 sqm (+8%) (see Figure 23).

Table 32 Total Employment Floorspace Stock by Use (SQM) (2022)

	Office (EG(i)/(ii))	Warehousing (B8)	General Industrial (B2/EG(iii))	Total
Total Floorspace	324,864	231,944	159,656	716,464
Proportion of Borough Total	45%	32%	22%	100%

Source: CoStar and Avison Young, 2023

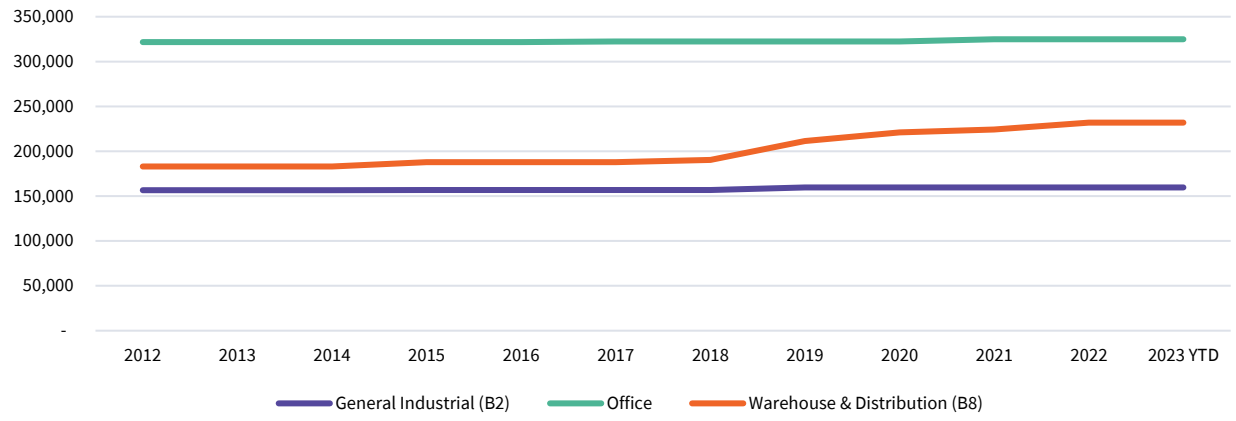


Figure 23: Total Employment Floorspace Stock By Use Over Time (2012 2022) (SQM)
Source: CoStar and Avison Young, 2023

Sub-Area Supply

5.2 To investigate the nature of this supply in more detail site-specific appraisals of 'B-class' employment sites have been undertaken (see Table 33). These have focused on designated employment sites as well as a number of undesignated sites that may present opportunities for re-development and/or intensification as identified by LBB.

5.3 In line with PPG guidance most sites considered are greater than 0.25ha. While small sites play an important role in meeting business needs, this study primarily focuses on those that make a significant contribution to

the borough's employment floorspace and/or have the potential to accommodate meaningful levels of future economic growth.

5.4 In total 29 sites have been surveyed which combined provide around 111.88 ha of B-class employment land and 528,410 sqm of floorspace. By designation:

- 46.66 ha and 209,440 sqm is or is on designated SIL land.
- 40.08 ha and 181,367 sqm is or is on designated LSIS land.
- 3.96 ha and 25,963 sqm is or within a designated office cluster.
- 13 ha and 97,774 sqm is within Business Improvement Area locations.
- 8.18 ha and 13,866 sqm is or is on undesignated land.

5.5 These appraisals, which have involved a combination of on-the-ground and desk-based analysis, explore a wide range of parameters for each site from accessibility to the quality of commercial stock – records are presented in Annex I.

5.6 The information collected has subsequently been used to undertake three sequential assessments for each site that align with the PPG's 'Availability', 'Suitability' and 'Achievability' methodology. This process enables a shortlist of sites to be identified that present opportunities for intensification, co-location and/or re-orientation, and can form part of the borough's functional supply of employment land. The three steps are set out below in more detail:

1. **Availability:** Firstly, each site has been assessed to identify whether there is 'availability' to develop vacant plots or the potential to re-develop and/or intensify active but underutilised areas.
2. **Suitability:** Secondly, sites that have 'availability' have been assessed to determine how well suited they are to continue supporting employment uses as well as further development. Drawing on the detailed analysis presented for each site in Annex 1, this has involved scoring each site against the 'employment quality criteria' set out in the table below on a scale of 1-5 using Avison Young's professional judgment[41]. An average overall score has been calculated for each site to provide an indication of their suitability to continue supporting employment uses and further development.

   To add detail to this, each site has been assessed to determine which broad employment uses are most appropriate (i.e. Office, General Industrial and Warehousing) and which ancillary uses could be supported. Ancillary uses are suggested where they will enhance the overall employment offer, but are not recommended to replace or dominate the broad uses that are deemed most appropriate.

Employment Quality Criteria	Description	Questions Considered
Location Character	Consideration of the character of the site ranging from highly residential sites to dense employment sites. Highly residential sites are generally less suitable for employment uses than areas with more commercial activity, particularly more industrial type activities.	• Do residential uses adjoin the site? • Are neighbouring uses separated by roads, rail, rivers and/or other green space? • Are on-site uses loud, noisy, polluting and/or 'bad neighbours'? • Do on-site uses generate significant vehicle movements? • Does the building type and scale detract from the character of the local area?
Building Age and Quality	Consideration of the current condition of the commercial property stock ranging from older and lower-quality stock to modern and high-quality stock. The quality and age of the stock plays a role in determining whether an area can be expected to attract new investments and/or go through re-development.	• Are commercial buildings older or younger than 30 years? • What rating are the commercial buildings given by Co-Star? • Do commercial buildings look contemporary and would they be attractive to occupier? • Are higher-quality and more modern buildings currently let?
Neighbouring Amenities	Consideration of the presence of local amenities. Proximity to local amenities (such as restaurants,	• Is the site within a ten minute walk of a town centre of high street? • Are there any shops or cafés on site?

[41] 1 = Very poor quality, 2 = Poor quality, 3= Fair quality, 4= Good quality; 5 = Very good quality.

	cafes, bars, supermarkets, gyms etc) is usually valued by businesses, particularly office-based occupiers.	• Do any food vans or stalls set up on site on a regular or semi-regular basis? • Are there any pubs or bars close to the site? • Are there any health, leisure or wellbeing uses within a ten minute walk of the site (e.g. gym, cinema, barber, hairdresser etc)?
Adequate Access and Parking	Consideration of the accessibility of the site to the road network and the existence of adequate parking or yard areas. Accessibility and the availability of parking are important to most industrial businesses, particularly those with large workforces and those requiring regular deliveries. Locations that are difficult to access, for example, via country lanes or residential areas, are less suitable for employment uses.	• Can vehicles access the strategic network easily or is access compromised? I.e. does vehicles have to travel through low-density residential areas and/or country lanes? • Is there sufficient parking at different times of the day and week? • Is parking ordered and well-managed? • Do units have sufficient yard areas or is storage spilling out onto the road? • Are any occupiers taking up excessive amounts of parking on site (e.g. vehicle repair companies)?
Vacancy of Land and Buildings	Consideration of the level of land and floorspace that is vacant ranging from high to low. High levels of vacant land and buildings generally indicates low levels of demand.	• Are vacancy rates above the 8% 'healthy' vacancy rate? • Is land well-utilised or are there clear development opportunities? • Is the location attractive to occupiers? • Are car parks busy or empty?
Proximity to a Station	Consideration of whether there is a station close to the site. Similarly, to the proximity to local amenities, this will be favoured by all businesses but particularly office-based businesses undertaking professional service activities.	• Is there a station within a 15 minute walk of the site? • Are there any bus stops close to the site that provide connectivity to stations?
Proximity to the Road Network	Consideration of whether the site has good proximity and access to major trunk roads. This is considered a benefit for many occupiers, but particularly heavier industrial businesses and those operating transportation and distribution activities.	• Is the strategic road network accessible within 15 minutes' drive of the site? • How far away is the major road network?
Alignment and Policy	Alignment and contribution to national and local place-based and regeneration policy.	• Do the uses on site align with local site allocation policy? • Do the uses on site align with local and regional economic development strategies? • Do the uses on site respond to local and regional demand signals? • Are there any uses on site that provide 'higher-value' economic activities that make an important contribution productivity?

3. **Achievability:** Thirdly, sites have been assessed to consider what might be 'achievable' on each in the future. Using the suitability assessment, wider insights related to landownership, knowledge of planning policy restrictions and professional judgement about the attractiveness of sites to developers, a recommendation has been assigned to each. One of six potential actions are identified:

- **Remain** an employment site: Sites to be retained in their current use which are characterised by a high occupancy of the site and good quality of buildings. Retention is focused on maintaining the existing capacity of the site for similar employment uses and space typologies - redevelopment and improvements to these sites should be supported, but the focus should be on retaining the existing character of employment activity.
- **Intensify** the employment site: Sites that generally provide low density employment, high vacancy of space and/or inefficient use of the space by the current uses. Access to the transport network, particularly to the road network for industrial employment uses, will increase the potential of sites to be intensified. Sites earmarked for intensification can (a) re-provide space for existing employment uses in a more intense configuration (b) use vacant land to provide additional employment space or (c) replace the existing employment uses with more intense 'B-class' employment uses.
- **Co-locate** with complementary uses: Recommended on sites that present re-development opportunities and are close to public transport and amenities (i.e. town centres) where different employment and non-employment generating uses could be accommodated in combination. The *London Plan* defines mixed-use development as *"development for a variety of activities on single sites or across wider areas such as town centres"*.
- **Re-orient** the offer of the site: Sites that have a specific employment focus (e.g. office) but suffer from higher-than-average vacancy rates, a low-quality offer and/or locations that are less attractive that

could support a different type of employment generating use (e.g. industrial, hotel, leisure, wellbeing, healthcare etc).

- **Release** as an employment site: Sites that have issues around their use as employment sites (i.e. problem of accessibility or conflicting use with the character of the neighbouring area) that may affect their future operational viability, have limited intensification or other employment generating use redevelopment potential or offer a high potential for residential use and may be considered to support the Borough's housing targets.
- **Extend** the employment site: Sites that should remain employment sites but could be extended onto adjacent land that is underutilised or poorly utilised and not currently in employment use.

5.7 It is important to note that at this stage these judgements are agnostic to whether a site is designated or undesignated – the reccomendations set out here focus on the most suitable option for the sites based on the evidence collected. These judgements are used in the Conclusion at the end of the report to identify which sites should remain or become designated based on the level of need identified following demand-supply calculations.

5.8 A high-level overview of the characteristics of each site and the results of these assessments is provided in Table 33 below.

Table 33: Site List and Summary

	Site Name and Designation	Site Area (Ha)	Existing Employment Uses	Floorspace By Use Types (SQM)	Available?	Suitability Score	Suitable Employment Uses	Achievable?	Vacant Land (Ha)	Vacant Floorspace (SQM) by Use Type
1	Klingers – SIL	8.47	General Industrial and Warehouse	Office: 0 General Industrial: 4,474 Warehouse: 27,424	No	4.4	Office (Ancillary), Light industrial, industrial and wholesale	Remain	0	Office: 0 General Industrial: 4,086 Warehouse: 0
2	Crayfields Industrial/Business Park – SIL & Office Cluster	5.56 (Crayfields Business Park office clusters make up 2.2 ha)	Office, General Industrial and Warehouse	Office: 11,004 General Industrial: 1,260 Warehouse: 11,007	Yes	3.9	Office, Light industrial, industrial, workspace and wholesale	Extend and Re-orient	0	Office: 2,085 General Industrial: 0 Warehouse: 0
3	Sevenoaks Way/Cray Avenue - SIL	32.56	Office, General Industrial and Warehouse	Office: 5,461 General Industrial: 80,711 Warehouse: 68,099	Yes	4.3	Office (Ancillary), Light industrial, industrial, storage and distribution, workspace, wholesale, restaurants and cafes and leisure	Intensify	0.34	Office: 0 General Industrial: 3,372 Warehouse: 0
4	Knoll Rise – Office Cluster	0.78	Office	Office: 8,809 General Industrial: 0 Warehouse: 0	No	4	Office, workspace, restaurants and cafes and leisure	Remain	0	Office: 2,112 General Industrial: 0 Warehouse: 0
5	Glebe Farm – Undesignated	0.37	Office, General Industrial and Warehouse	Office: 193 General Industrial: 1,155 Warehouse: 578	No	3	Office, Light industrial and workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
6	Tripes Farm Business Centre – Undesignated	1.14	Office	Office: 929 General Industrial: 0 Warehouse: 0	Yes	2.8	Office, light industrial and workspace	Remain	0.19	Office: 0 General Industrial: 0 Warehouse: 0
7	Charmwood Farm - Undesignated	1.19	Office and General Industrial	Office: 198 General Industrial: 1,245 Warehouse: 0	Yes	3.25	Light industrial and workspace	Remain	0.12	Office: 0 General Industrial: 0 Warehouse: 0
8	Kimberley Business Park - LSIS	0.42	Office and Warehouse	Office: 332 General Industrial: 0 Warehouse: 384	No	2.9	Office (ancillary), light industrial, industrial, and workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
9	Higham Hill Farm (LSIS) - LSIS	0.98	Office, General industrial ad Warehouse	Office: 138 General Industrial: 2,510 Warehouse: 206	Yes	2.5	Office (ancillary), light industrial, industrial, and workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
10	Biggin Hill - LSIS	7.19	General Industrial and Warehouse	Office: 0 General Industrial: 17,462 Warehouse: 25,895	Yes	3.9	Office, light industrial, industrial, workspace, wholesale and restaurants and cafes	Remain and Intensify	1.52	Office: 0 General Industrial: 0 Warehouse: 0
11	Lower Hook Business Park – Undesignated	0.89	Warehouse	Office: 0 General Industrial: 1,229 Warehouse: 0	Yes	2.9	Office (ancillary), light industrial and workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
12	Hillside Farm (Undesignated) – Undesignated	1.98	General Industrial and Warehouse	Office: 0 General Industrial: 1,000 Warehouse: 852	Yes	2.8	Office (ancillary), light industrial and workspace	Remain	0.5	N/A
13	Higham Hill Farm Undesignated - Undesignated	0.85	General Industrial and Warehouse	Office: 0 General Industrial: 212 Warehouse: 2816	No	N/A	Office (ancillary), light industrial and workspace	Remain	0	N/A
14	Farwig Lane - LSIS	2.36	Office, General Industrial and Warehouse	Office: 1,790 General Industrial: 1,772	Yes	3.5	Office (Ancillary), Light industrial, industrial, storage and distribution,	Remain	0	Office: 625 General Industrial: 0 Warehouse: 0

				Warehouse: 18,144			workspace, wholesale, restaurants and cafes and leisure			
15	London Area Road – BIA	1.66	Office and General Industrial	Office: 12,148 General Industrial: 440 Warehouse: 0	Yes	3.9	Office, workspace, restaurants and cafes and leisure	Remain	0	Office: 2,716 General Industrial: 0 Warehouse: 0
16	Bromley North – BIA	4.18	Office and General Industrial	Office: 14,351 General Industrial: 714 Warehouse: 0	Yes	4.1	Office, workspace, restaurants and cafes and leisure	Retain with selective release	0	Office: 2,202 General Industrial: 0 Warehouse: 0
17	Bromley South – BIA	6.85	Office	Office: 70,119 General Industrial: 0 Warehouse: 0	Yes	4.3	Office, workspace, restaurants and cafes and leisure	Re-orient and Co-locate	0	Office: 4.204 General Industrial: 0 Warehouse: 0
18	Waldo Road - LSIS	0.66	General Industrial and Warehouse	Office: 0 General Industrial: 1,738 Warehouse: 970	No	N/A	N/A	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
19	Mason's Hill – Office Cluster	0.96	Office	Office: 7,158 General Industrial: 0 Warehouse: 0	Yes	2.8	Office and workspace	Re-orient	0	Office: 5,433 General Industrial: 0 Warehouse: 0
20	Enterprise House - LSIS	0.37	Office and General Industrial	Office: 932 General Industrial: 597 Warehouse: 0	No	2.4	Office (ancillary), light industrial, storage and distribution, wholesale, restaurants and cafes and leisure	Re-orient	0	Office: 932 General Industrial: 298 Warehouse: 0
21	The Beechwood Centre - LSIS	0.23	Warehouse and distribution	Office: 0 General Industrial: 0 Warehouse: 1,173	No	N/A	N/A	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
22	Bencewell Business Park - LSIS	0.33	Office and General Industrial	Office: 465 General Industrial: 588 Warehouse: 0	Yes	2.9	Office (ancillary), light industrial, industrial, storage and distribution and restaurants/cafes	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
23	Scrubs Farm – Undesignated	1.71	General Industrial and Warehouse	Office: 0 General Industrial: 969 Warehouse: 1640	No	2.9	Office (ancillary), light industrial, industrial and workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
24	Parkside Business Park - Undesignated	0.05	Office	Office: 404 General Industrial: 0 Warehouse: 0	No	N/A	N/A	Remain	0	N/A
25	Lower Sydenham - LSIS	16.38	Office, General Industrial and Warehouse	Office: 11,193 General Industrial: 25,770 Warehouse: 35,773	Yes	4.25	Office (ancillary), light industrial, industrial, storage and distribution, wholesale and restaurants and cafes	Intensify	0.04	Office: 5,747 General Industrial: 2,098 Warehouse: 3,117
26	Oakfield Road - LSIS	4.82	General Industrial and Warehouse	Office: 0 General Industrial: 5,062 Warehouse: 6,112	Yes	4.1	Office (ancillary), light industrial, industrial, storage and distribution, wholesale and restaurants and cafes	Intensify and/or Co-locate	0	Office: 0 General Industrial: 5,062 Warehouse: 6,122
27	Franklin Industrial Centre - LSIS	0.41	Warehouse	Office: 0 General Industrial: 0 Warehouse: 1,462	Yes	3.1	Office, light industrial, workspace	Remain	0	Office: 0 General Industrial: 0 Warehouse: 0
28	Elmers End - LSIS	5.93	Office, General Industrial and Warehouse	Office: 1,437 General Industrial: 3,336 Warehouse: 16,116	Yes	4.3	Office (ancillary), light industrial, industrial, storage and distribution, wholesale	Remain	0	Office: 0 General Industrial: 278 Warehouse: 0

Source: CoStar (Designated), VOA (Undesignated) and Avison Young (Designated and Undesignated), 2023. Floorspace figures for undesignated sites assumed to be 'General Industrial' as VOA data does not break data down by specific use.

5.9 To support the analysis of these sites, and provide an overarching view of the characteristics and opportunities for sites that are close together, they have been grouped into four clusters:

A. East Bromley (Cray Valley) incorporating: Klingers, Crayfields Business/Industrial Park, Sevenoaks Way/Cray Avenue, Knoll Rise, Tripes Farm Business Centre, Charmwood Farm.
B. South Bromley, incorporating: Kimberley Business Park, Higham Hill Farm (LSIS), Biggin Hill, Lower Hook Business Park, Glebe Farm, Hillside Farm and Higham Hill Farm (Undesignated).
C. Bromley Centre: Farwig Lane, London Area Road, Bromley North, Bromley South, Waldo Road, Mason's Hill, Enterprise House, The Beechwood Centre, Bencewell Business Park, Scrubs Farm and Parkside Business Centre.
D. North West Bromley, incorporating: Oakfield Road, Lower Sydenham, Franklin Industrial Centre, Elmers End.

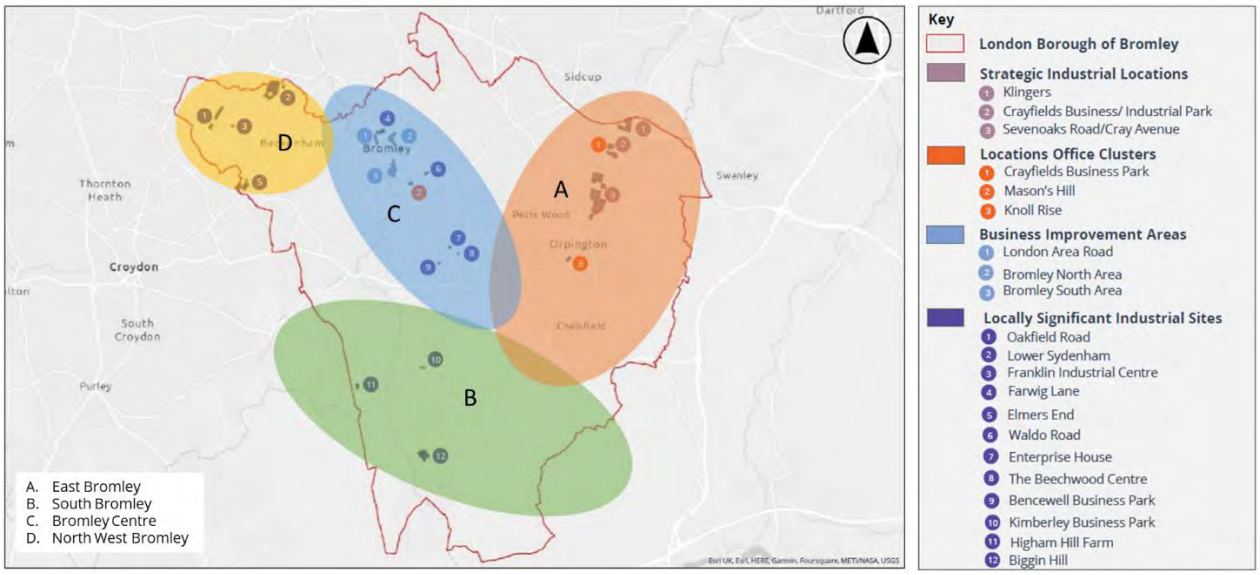


Figure 24: B Class Designated Employment Sites Clusters
Source: LBB and Avison Young, 2023

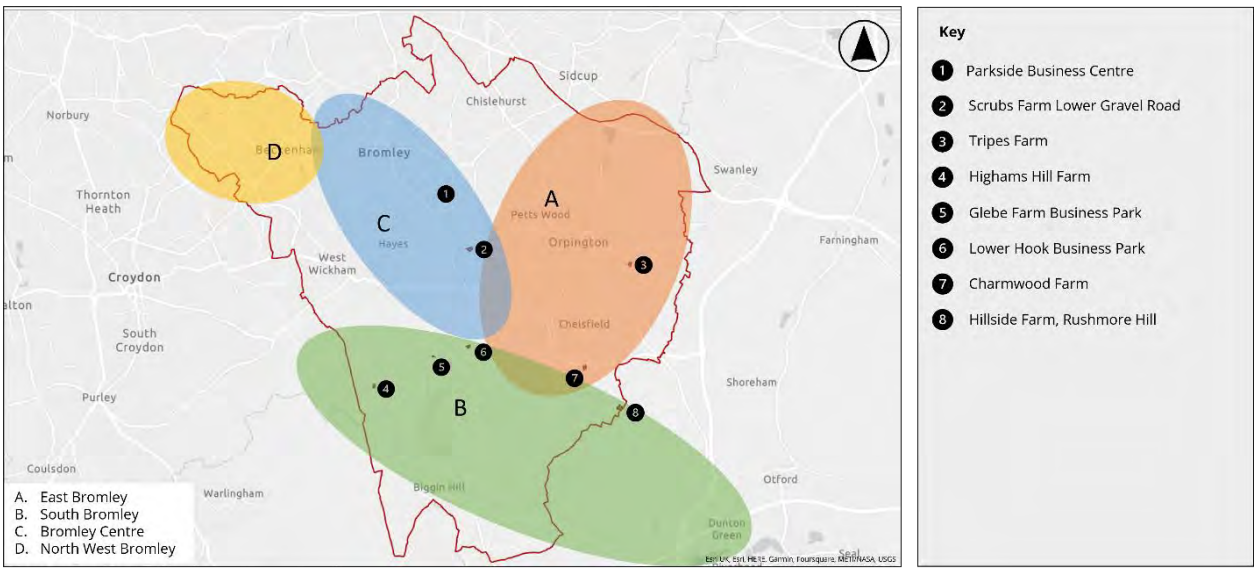


Figure 25: B Class Undesignated Employment Sites Clusters
Source: LBB and Avison Young, 2023

5.10 These clusters draw together a borough wide consideration of 'B-class' employment land supply and the conditions which shape the attractiveness of locations for different types of employment activity, as well as showing the simple geographic clustering of different employment activities within the borough as evident

in Figure 24 and Figure 25. A full description of each cluster and the results of the three assessments undertaken for each site are set out in the rest of this chapter.

Cluster A: East Bromley (Cray Valley)

5.11 The East Bromley cluster includes employment sites in and around Orpington, Chelsfield and St Mary Cray (i.e. the Cray Valley). It incorporates several general business and industrial estates and boasts the highest concentration of employment sites in the borough primarily due to the presence of the Cray Business Corridor SIL which is home to office, distribution, storage, manufacturing, motor trade and retail activity.

5.12 The cluster includes four designated employment sites that were appraised as part of this study, three of which are constituent parts of the Cray Business Corridor SIL and one of which is a separate Office Cluster. The designated sites include:

1. **Klingers:** The site provides modern light industrial and trade counter units. It lies within a mixed commercial location fronting the A223. It is located behind a large Tesco superstore and a Porsche Centre and forms part of the Crayfields Business Corridor SIL.
2. **Crayfields Business/Industrial Park:** This site contains Crayfields Business Park, an Office Cluster, as well as the Crayfields Industrial Park to the south. The site is a modern campus style development just off Sevenoaks Way and provides office space in the Business Park and light industrial space in the Industrial Park. Both parts of the site are within the Crayfields Business Corridor SIL and are separated by greenfield land.
3. **Sevenoaks Way/Cray Avenue:** This is a combination of four large sites to the south of Sevenoaks Way that encompass retail, industrial and office uses. They form the 'heart' of the Crayfields Business Corridor SIL and are strategically located close to St Mary Cray Station.
4. **Knoll Rise:** This site is an Office Cluster located on Knoll Rise within Orpington Town Centre characterised by a number of purpose built office blocks.

5.13 A further two undesignated employment sites were also appraised:

1. **Tripes Farm Business Centre:** A small purpose-built business centre near Chelsfield that provides several office and light industrial units within an agricultural setting.
2. **Charmwood Farm:** A small collection of business units near Pratt's Bottom characterised by five large and ageing warehouse units and a number of smaller workshop type spaces.

5.14 Collectively these six sites cover an area of 49.76 ha and provide over 221,067 sqm of employment space.

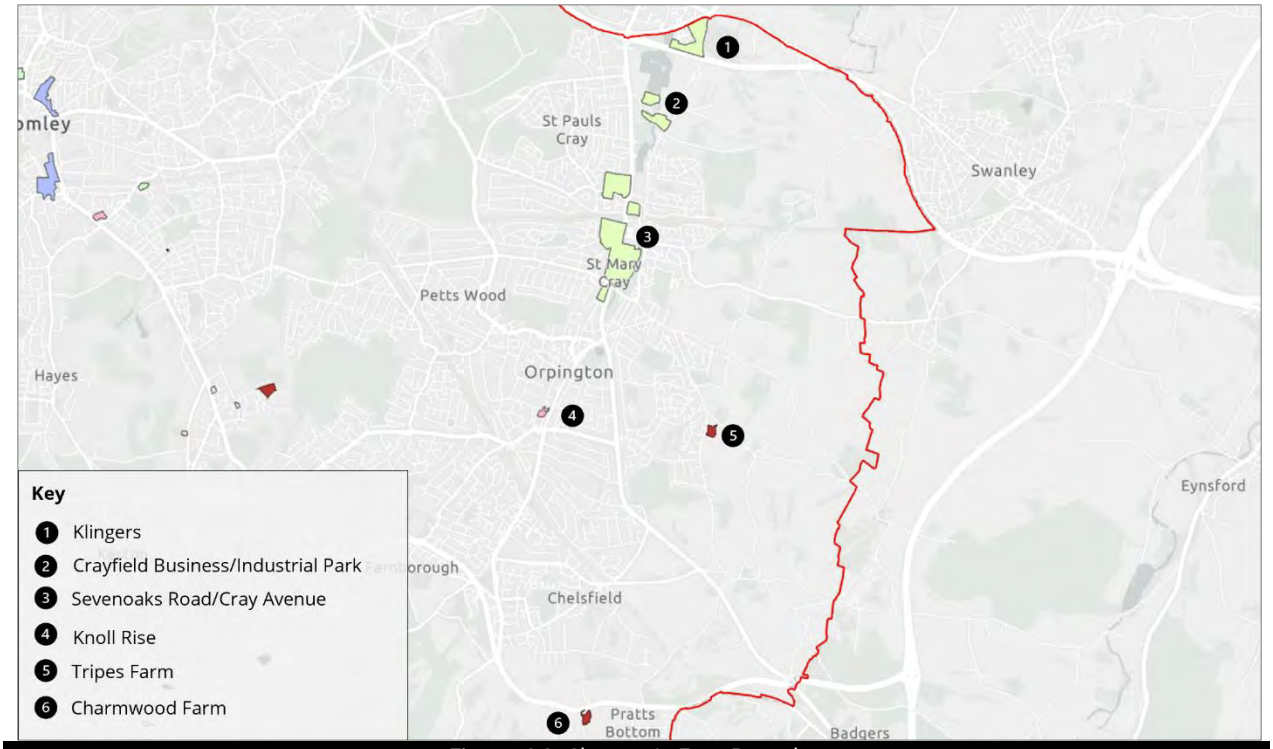


Figure 26: Cluster A: East Bromley

Source: LBB and Avison Young, 2023

5.15 The designated sites in East Bromley are mainly part of the Cray Business Corridor SIL so have broadly similar characteristics, apart from Knoll Rise in Orpington which is dominated by office uses. Only two of the designated sites offer obvious intensification opportunities for redevelopment (i.e. 'availability'):

- The Sevenoaks Way/Cray Avenue area is well-occupied and most land is currently used by business or related activity. There are, however, a small number of vacant units across the site that present 'availability' as well as plots that could be used more efficiently. For example, there are areas of open storage and car parking, as well as older, lower density, single storey-buildings coming towards the end of their economic life.
- The Crayfield Business/Industrial Park is also well-developed and has few immediate opportunities for intensification. The main opportunity is the underutilised green space between the two parts of the site which may present opportunities for expansion, though they are currently subject to greenbelt restrictions. The office stock to the north of the site is also of an age that will becoming increasingly less attractive to the market, both from an occupier needs and environmental perspective, indicating a potential need for re-development in the short-to-medium term.

5.16 The remaining designated sites, Knoll Rise and Klingers, are compact and, despite both having 'availability' in terms of vacancy, they are densely developed with little opportunity for development. It is important to note the vacant stock at Klingers is brand new and has only been released to the market relatively recently – local agents report that there has been strong interest and expect most remaining uses to be let over the short-term.

5.17 In terms of the undesignated sites both offer some form of 'availability'. While they are well-occupied, they are characterised by low density units with parking and generally have agricultural land surrounding them. This means that there is potential for intensification and/or expansion, but it is important to note that the opportunity is limited by their poor accessibility particularly in terms of public transport.

5.18 Despite this mixed 'availability' all the sites have been assessed for their 'suitability' below. This has been informed by detailed site-based analysis as set out in Annex 2.

5.19 As Table 34 shows Sevenoaks Way/Cray Avenue, Knoll Rise and Klingers are the most 'suitable' employment areas with the highest 'employment quality scores'. The features underpinning this are as follows:

- Sevenoaks Way/Cray Avenue is strategically located along Cray Avenue within 10 minutes of the M25 by road and St Mary Cray Station by foot. It is adjacent to Nugent Shopping Park which provides a range of amenities (including supermarket, cafes, shops, pharmacy etc) and there is little vacant land. It is clearly an attractive area for occupiers to locate illustrated by fairly good occupancy rates and the re-development and renovation of several units in recent years, including the Halo Business Park which offers almost 14,000 sqm of new light industrial and wholesale space.
- Knoll Rise is a 'suitable' office site due to its town centre location. It benefits from relatively good road connectivity, parking and a strong local amenity offer. The main office building on the site, Central Court, has also recently been partly upgraded to provide higher-quality modern floorspace that is attractive to modern occupiers.
- Klingers remains a 'suitable' employment site as it is well-located adjacent to the A20 making it easy to access via road. Crucially it is close to an entrance to and exit from the A20 which makes it easy to access and provides good connections to the M25, Dartford Crossing and Blackwall Tunnel. It also benefits from its proximity to the Tesco superstore which offers a range of services including a pharmacy, café and other in store concessions. It is relatively new so has modern and high-quality units with good yard and parking space.

5.20 Crayfields Business/Industrial Park has a lower score but remains a 'suitable' location for employment uses. Factors influencing its lower score including its comparative isolation from amenities and public transport, as well as some emerging vacancy challenges within the Office Cluster.

5.21 Both undesignated sites perform less strongly than the designated sites on the parameters assessed. This is because they are small and isolated sites that require a car or other private vehicle to access. They are also not close to other complementary employment uses and there is a distinct lack of amenities in and around both. While they are not optimal employment sites they remain 'suitable' for continued use at present as they are well-occupied and valued by local small businesses and enterprises.

Table 34: Suitability Assessment for Cluster A: East Bromley Sites

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Average Score
Klingers	8.47	Industrial									4.4
Crayfields Business/Industrial Park	5.56	Industrial									3.9
Sevenoaks Way/Cray Avenue	32.56	Industrial									4.3
Knoll Rise	0.78	Office									4
Tripes Farm Business Centre	1.14	Industrial									2.8
Charmwood Farm	1.19	Industrial									3.25

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). *Note: Evidence presented in Annex 2 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.*

5.22 In terms of future uses, due to their similar characteristics, Klingers, Crayfields Business/Industrial Park and Sevenoaks Way/Cray Avenue are all appropriate for light industrial, industrial and wholesale type activities (i.e.B2/EG(iii)). Sevenoaks Way/Cray Valley is also suitable for storage and distribution type activity (i.e. B8), as demonstrated by the recently-developed Amazon warehouse, due to the scale of the area and straightforward access to the A20 and M25. The other two sites are more constrained in nature and less well-suited to the vehicle movements that storage and distribution occupiers generate. Knoll Rise is a more

restricted site and, given its town centre location, is more appropriate for office and 'clean' workplace type uses (i.e. EG(i)/(ii))) as well as ancillary town centre type facilities.

5.23 The undesignated sites do not present any obvious opportunities for the diversification of their existing offer given their locational disadvantages (i.e.B2/EG(iii)). They therefore remain suitable for light industrial uses and potentially 'messier' workspace and workshop typologies. They are not of a sufficient size or scale to create demand for ancillary uses such as cafes, restaurants and other leisure uses.

Table 35: Suitable Employment Uses for Cluster A: East Bromley

Site	Office	Light Industrial	Industrial	Storage and Distribution	Workspace	Wholesale	Restaurants and Cafes	Leisure
Klingers	Ancillary							
Crayfields Business/Industrial Park								
Sevenoaks Way/Cray Avenue	Ancillary						Ancillary	Ancillary
Knoll Rise							Ancillary	Ancillary
Tripes Farm Business Centre								
Charmwood Farm								

Source: Avison Young, 2023

5.24 Using the intelligence set out above, combined with data collected during 'on-the-ground' site visits, a recommendation has been made for each site based on what is 'achievable'. As shown in Table 36 below, it is recommended that the Sevenoaks Way/Cray Avenue site is a focus for intensification activity given there are opportunities relating to excess car parking, vacant units, open storage and older units. The Crayfields Business/Industrial Park could also be intensified and the main opportunity relates to its potential expansion to increase capacity and the potential re-development of its ageing office stock over the short-to-medium term. The Klingers, Knoll Rise and undesignated sites provide few opportunities for development but remain 'suitable' so it is recommended that they remain employment sites.

Table 36: Recommendations for Cluster A: East Bromley

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Recommendations
Klingers	8.47	0	General Industrial: 4,086	Klingers is a modern, well-utilised and organised industrial estate in the Cray Business Corridor SIL that is occupied by a mix of light industrial occupiers. The site is densely used and developed so it is recommended that it is retained and protected in its current form. While the site currently has some vacant floorspace all of this is new stock that has relatively recently been released to the market. Agents report that there has been strong interest and expect most remaining uses to be let over the short-term.	Remain
Crayfields Business/Industrial Park	5.56	0	Office: 2,085	Crayfields Business/Industrial Park has limited immediate opportunities for re-development, but there is underutilised green space that sits between the two areas that could be developed to provide additional capacity. This includes land to the west of the River Cray and south of New Mill Road, and land to the north of Main Road and west of Sandy Lane. This is currently designated as green belt land, so could only be used in 'exceptional' circumstances but it may need to be considered if the borough's projected employment space demand cannot be met through existing supply and sites. If these areas are released, there may also be scope to re-develop, re-orient and intensify other uses on site if viable – particularly the office area to the north where the buildings are becoming increasingly unattractive to the market from both an occupier needs and ESG perspective. This area could be released from its Office Cluster designation while retaining its SIL designation given industrial type uses are most suitable here given the characteristics of the site and its location. Whatever comes forward, however, will have to be sensitive of the surrounding environment and existing bowls club that is located south of New Mill Road. There is also scope to bring the adjacent Homebase site into the SIL to encourage a more comprehensive and impactful scheme to come forward incorporating the whole Crayfields site. While the Homebase store is well-used, the site it sits on is not used intensely and bringing it into the SIL could provide opportunities to achieve greater efficiencies unlocking additional employment floorspace.	Extend and Reorient

Sevenoaks Way/Cray Avenue	32.56	0.34	General Industrial: 3,372	The site is a thriving industrial estate with a reasonably high-quality environment and good amenities. There are however opportunities for intensification that could increase capacity. For example: • There is a collection of light industrial and industrial buildings to the south of the Amazon distribution centre on Cray Avenue that are relatively low density and accompanied by large areas of parking and open storage. • There are several older low-density light industrial buildings with associated yard space coming towards the end of their economic life at the end of Murray Road. • The SGN Regional Depot just off Sevenoaks Way has a large area of open storage for tools, materials and vehicles. • There are areas with large vehicle storage space and car parking that could be better configured to unlock more employment floorspace, including the block directly north of the rail tracks to the west of Mill Brook Road. These, and others, present opportunities to increase industrial-type floorspace in the area.	Intensify
Knoll Rise	0.78	0	Office: 2,112	Knoll Rise is a well-utilised office cluster located in Orpington town centre. It is a 'suitable' site for office uses and does not currently suffer from high vacancy rates though this is a potential risk given trends observed in Bromley South. It is therefore recommended that it is retained in its current form to meet future demand. If occupation becomes challenging in the future there may be an opportunity to retrofit buildings that have not yet been renovated to provide more modern office space that better meets modern occupier requirements or to investigate other forms of workspace that may complement and add to the town centre offer.	Remain
Tripes Farm Business Centre	1.14	0.19	0	Tripes Farm Business Centre provides a number of light industrial and workshop type units surrounding an open yard space. There are areas of open space, including hard standing, gardens and fields that could be developed to increase the quantum of employment floorspace, but the site's position within the greenbelt and adjacency to housing estates limit the opportunity for intensification.	Remain
Charmwood Farm	1.19	0.12	0	The site provides several light industrial and industrial units surrounded by an area of hardstanding and car parking. It is more accessible than many other 'rural' undesignated sites in the borough, given its proximity to the A21, making intensification more feasible than in other locations. Development would, however, need to be reasonably comprehensive to unlock additional floorspace given the site's current layout is fairly restrictive. Expansion would also be difficult to achieve given the site sits within the greenbelt. For these reasons it is recommended for retention rather than intensification.	Remain

Source: Avison Young, CoStar and VOA, 2023

Cluster B: South Bromley

5.25 South Bromley includes employment sites in and around Biggin Hill, Keston, Knockholt and Wallingham. The area has the borough's smallest employment footprint and is dominated by Biggin Hill Airport and its associated industrial and business parks. Three designated employments sites have been appraised as part of this study, including:

1. **Kimberley Business Park:** A small LSIS to the northeast of the cluster that hosts light industrial activities in a mix of permanent structures and shed-type workshops.
2. **Higham Hill Farm (LSIS):** An LSIS located close to New Addington with a number of small industrial units, offices and agricultural buildings.
3. **Biggin Hill:** A medium sized LSIS site adjacent to Biggin Hill Airport consisting of light industrial and office types uses. It is split into three distinct parts: (1) Formula One Management, (2) Airport Trading Estate and (3) Concorde Business Centre.

5.26 A further four undesignated site were also appraised:

1. **Lower Hook Business Park:** A small industrial site between Green Street Green and Biggin Hill dominated by a vehicle repair occupier and a small number of other light industrial businesses.
2. **Hillside Farm:** A small rural site between Pratt's Bottom and Knockholt which has several low-quality and older light industrial and agricultural buildings accompanied by large yard areas used by a logging occupier and several car repair companies.
3. **Higham Hill Farm (Undesignated):** A small rural business centre close to the Higham Hill Farm LSIS site that has two large light industrial units accompanied by limited yard space.
4. **Glebe Farm:** A small agricultural site near Downe that has three low-quality light industrial units and a collection of agricultural buildings.

5.27 Collectively these seven sites cover an area of 12.68 Ha and provide over 54,961 sqm of employment space.

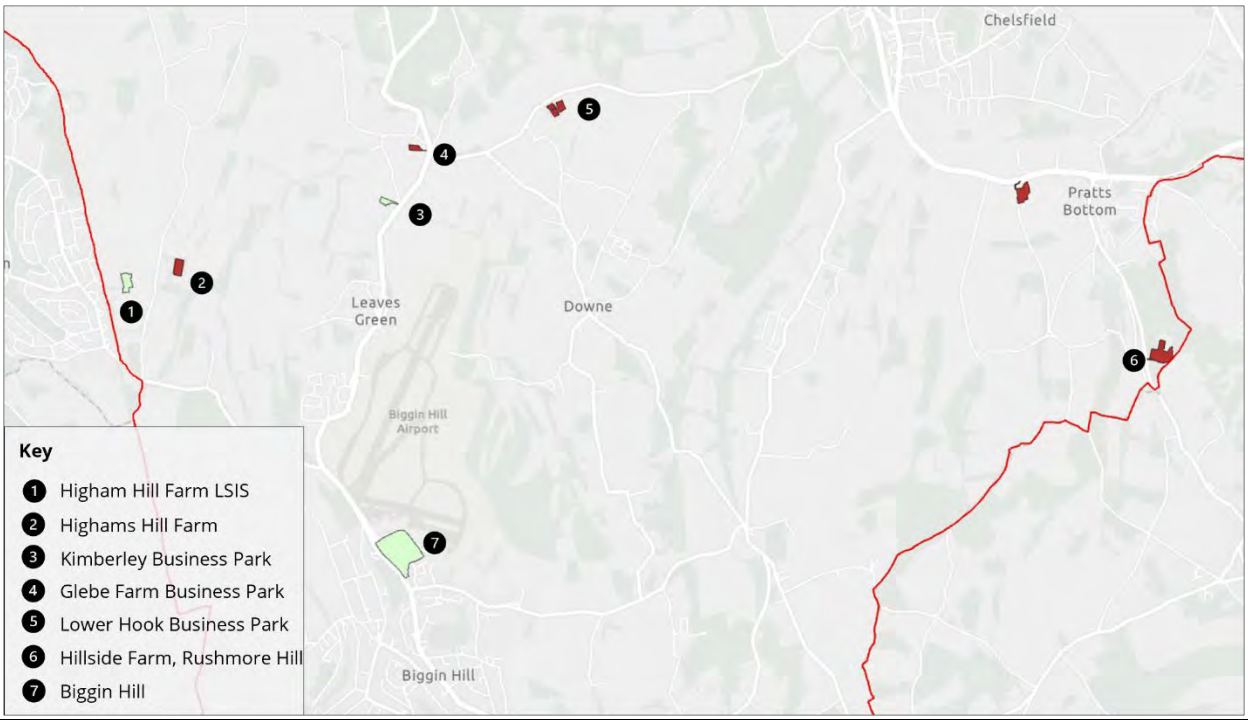


Figure 27: Cluster B: South Bromley
Source: LBB and Avison Young, 2023

5.28 All seven sites are predominantly industrial and/or agricultural in nature, but Kimberley Business Park, Higham Hill Farm (LSIS) and the four undesignated sites are much smaller and less developed than Biggin

Hill which also has some office space in the form of Formula One Management's headquarters. All sites are well-utilised but have some levels of 'availability' bar Higham Hill Farm (Undesignated):

- Kimberley Business Park is well-occupied with tenants in a mix of permanent light industrial units as well as wooden workshops. Most units are occupied but areas of the car park have open storage that present some 'availability'.
- Higham Hill Farm (LSIS) is well-occupied by a mix of light industrial, office and agricultural type businesses. There is, however, some 'availability' in terms of open space, yards and gardens but intensification and expansion opportunities are limited by poor accessibility and the surrounding greenbelt designation.
- Biggin Hill is well-developed and occupied but there are a small number of plots that are 'available' or could be better utilised to support increased employment floorspace assuming there are no restrictions to development in these areas.
- Lower Hook is well-occupied and has some modern light industrial units, but there are extensive areas of vehicle storage which could be re-organised and more productively used.
- Hillside Farm has a very low density of commercial buildings and is dominated by open storage for vehicles and other materials. While much of it is not technically 'available' as it is being used by occupiers, it could be more efficiently used to provide more space for other employment-generating uses.
- Glebe Farm is fairly extensively covered and most land is built upon though there are some areas of open storage as well as a horse-riding arena.

5.29 The only site with more limited 'availability' is Higham Hill Farm (Undesignated) which is relatively intensely used and well-occupied.

5.30 All sites that have 'availability' have been assessed for their 'suitability' to support continued employment use. This has been informed by detailed site-based analysis as set out in Annex 2.

5.31 As set out in Table 37 below, Biggin Hill has the highest 'employment suitability score' which is due to its strategic position next to Biggin Hill Airport. This location makes it suitable for light industrial type uses, as well as activities that support the functioning and supply chain of the airport. It is largely detached from residential areas making it 'suitable' for some of the 'heavier' activities undertaken on site ranging from engineering to car repair. The area is also accessible by road and has ample parking for both visitors and workers alike. Its main limitation is its poor accessibility via public transport.

5.32 The other two designated sites and the remaining undesignated sites have lower 'suitability' scores. The scores for each are fairly close as all six sites have similar characteristics, occupiers and locations. The common factors undermining their scores are:

- They are all relatively far from railway stations and most have limited bus routes and options.
- There are no amenities on offer or nearby these sites due to their 'rural' and isolated nature.
- Several have poor accessibility due to their positioning away from trunk routes on country roads. This is particularly the case for Higham Hill Farm which is accessed via a private single-track lane.
- Most sites are dominated by low quality buildings and ageing agricultural or light industrial type uses.

5.33 Despite these limitations they remain 'suitable' employments sites at present as they are well-occupied and valued – however they are unlikely to contribute to meeting future additional floorspace needs. Their occupation should, however, be monitored over time as they are not considered 'optimal' sites for employments uses.

Table 37 Suitability Assessment for Cluster B: South Bromley

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Average Score
Kimberley Business Park	0.42	Industrial									2.9
Higham Hill Farm (LSIS)	0.98	Industrial									2.5
Biggin Hill	7.19	Industrial									3.9
Lower Hook	0.89	Industrial									2.9
Hillside Farm	1.98	Industrial									2.8
Glebe Farm	0.37	Industrial									3

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 2 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

Table 38: Suitable Employment Uses for Cluster B: South Bromley

Site	Office	Light Industrial	Industrial	Storage and Distribution	Workspace	Wholesale	Restaurants and Cafes	Leisure
Kimberley Business Park								
Higham Hill Farm (LSIS)								
Biggin Hill							Ancillary	
Lower Hook								
Hillside Farm								
Higham Hill Farm (Undesignated)								
Glebe Farm								

Source: Avison Young, 2023

5.34 In terms of future uses, all sites in the cluster are largely industrial and/or agricultural in nature and generally provide smaller units with the exception of Biggin Hill. They are all suitable for more industrious type uses such as light industrial and 'dirtier' workspace typologies (i.e.B2/EG(iii)). Biggin Hill is the only site that might be suitable for office uses in the future, though demand for this type of space is likely to be limited unless provided for an occupier that supports activities at the airport.

5.35 Based on the above and information collected via the site visits a specific recommendation has been identified for each site. As set out in Table 39 below, Kimberley Business Park, Higham Hill Farm (LSIS) and the four undesignated sites are recommended to remain as employment sites rather than for intensification. While there are opportunities for re-development across nearly all sites, their location, connectivity, accessibility and policy designations mean that they are not ideally suited for intensive development. Biggin Hill, in contrast, is more appropriately located and has a small number of opportunities for expansion and development so has been recommended for retention and intensification.

Table 39: Recommendations for Cluster B: South Bromley

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Recommendations
Kimberley Business Park	0.42	0	N/A	The site is occupied and home to a range of formal and informal activities, mostly within sheds, offices and former agricultural buildings. While the site could be better and more efficiently organised to provide additional employment space, its distance from public transport, amenities and poor accessibility versus other employment sites makes it less 'suitable' for re-development so it is recommended for retention.	Remain
Higham Hill Farm (LSIS)	0.98	0	N/A	Like Kimberley Business Park, Higham Hill Farm is well-occupied and home to a range of industrial activities. Due to the size and accessibility of the site, it is again not ideally suited for development so it is recommended for retention.	Remain
Biggin Hill	7.19	1.52	0	The site is well-occupied and an attractive location for aviation, engineering and other related activities. It is a key employment location and supports the functioning of Biggin Hill Airport. Within the site boundary there are a couple of potential opportunities for intensification or expansion: (A) There is a green space to the immediate south west of the Concorde Business Centre that is fenced off and has an area of hardstanding. (B) The car park serving Formula One Management is large and open and there is a wooded area immediately to the south east of it which is currently unused. While developing these area will not lead to a large increase in employment floorspace, and may have limitations in terms of covenants, infrastructure and biodiversity loss, the opportunity should be explored given the importance of the site to the borough's economy. This would have to be balanced with policies around biodiversity net gain. The combination of airport activities with other engineering and manufacturing activity on site presents a unique opportunity to create an even stronger economic cluster and to support agglomeration effects. While the airport itself is not a designated employment site, investment in additional employment-generating space on the airport would also support agglomeration effects meaning that investment in this location could create economic impacts that together are greater than the sum of their parts.	Remain and Intensify
Lower Hook	0.89	0	0	The site is well-occupied and home to a mix of light industrial activities, most notably a large vehicle repair centre which utilises much of the site for surface-level vehicle storage. Like Kimberley Business Park it could be intensified, and proposals to do so should be considered, but due to its locational characteristics it is not an ideal candidate for intensification activity. It also sits in the heart of the borough's greenbelt meaning any development activity would be highly restricted.	Remain
Hillside Farm	1.98	0.5	N/A	Similarly to both Kimberley Business Park and Lower Hook there are opportunities for development and proposals should be considered. The location and greenbelt restrictions related to the site, however, make it more suitable for retention than intensification.	Remain
Glebe Farm	0.37	0	N/A	The site is fairly extensively covered and most land is built upon though there are some areas of open storage, as well as a horse-riding arena. These open areas could be developed to provide a minor uplift in employment floorspace, but the site's locational and greenbelt restrictions make it a less than ideal location for intensification.	Remain
Higham Hill Farm (Undesignated)	0.85	0	N/A	Highams Hill Farm (Undesignated) is fairly modern, well-managed and the site is fully developed. There are no obvious opportunities for intensification unless the site is expanded which is not recommended due to the limitations of its 'rural' location and the green belt designation surrounding the site.	Remain

Source: Avison Young, CoStar and VOA, 2023

Cluster C: Bromley Centre

5.36 Bromley Centre includes employment sites in and around Bromley Town Centre, as well as a smaller collection towards Farnborough and Keston. The cluster is dominated by the large Metropolitan Town Centre to the north which offers a broad mix of retail, leisure, employment and residential uses served by multiple car parks and two stations. The area to the south is suburban in nature and is characterised by residential uses and green space punctuated by several small employment sites.

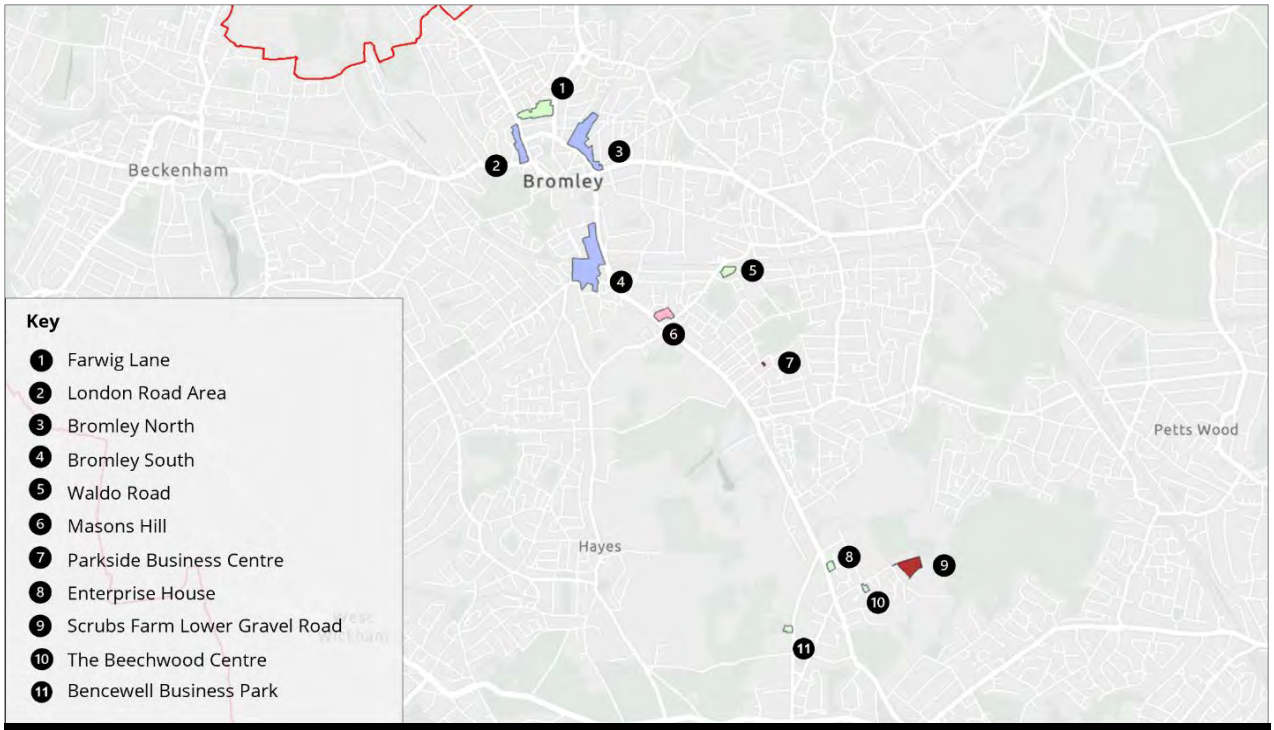


Figure 28: Cluster C: Bromley Centre
Source: LBB and Avison Young, 2023

5.37 The cluster as a whole includes nine designated and two undesignated employment sites that were appraised as part of this study which collectively cover an area of 19.36 Ha and provide around 136,114 sqm of employment space. The sites include:

1. **Farwig Lane:** A cluster of industrial-type buildings within walking distance of Bromley North station with an LSIS designation.
2. **London Road:** A Business Improvement Area (BIA) to the north of the cluster dominated by office-type uses that front onto the busy London Road.
3. **Bromley North:** A BIA surrounding Bromley North Station characterised by a mix of office blocks and residential uses, as well as a Royal Mail delivery office and large surface level car park.
4. **Bromley South:** A large BIA in Bromley Town Centre that incorporates a series of office blocks on Elmfield Road and a few large office buildings to the south of Bromley South station.
5. **Waldo Road:** A small and constrained LSIS that is adjacent to the railway line running east from Bromley South station and the Waldo Road Reuse and Recycling Centre.
6. **Mason's Hill:** An Office Cluster around half a mile south of the Bromley Town Centre which is home to several large purpose-built office blocks.
7. **Enterprise House:** A small LSIS site to the south of the cluster that has previously been used for a mix of industrial and office type uses.
8. **Beechwood Centre:** A compact LSIS site to the south of the cluster that is effectively a single building split into smaller office and light industrial type units.
9. **Bencewell Business Centre:** A small cluster of low-quality light industrial units with an LSIS designation.
10. **Scrubs Farm:** An undesignated employment site to the south of the area home to a collection of light industrial, warehousing and former farm buildings used by a mix of industrial type occupiers.

11. **Parkside Business Centre:** A very compact undesignated employment site characterised by a single building subdivided into smaller light industrial storage and workshop type units.

5.38 The characteristics of these sites varies significantly ranging from town centre office areas (e.g. Bromley South) to rural light industrial units (e.g. Bencewell Business Centre). While few of the sites have obvious intensification opportunities, many have 'availability' in terms of re-development or retrofit potential. These include London Road, Bromley North, Bromley South, Farwig Lane, Mason's Hill, Enterprise House, Bencewell Business Centre and Scrubs Farm. The remaining sites (Waldo Road, Beechwood Centre and Parkside Business Centre) all offer relatively good quality employment floorspace, but the sites are compact, well-occupied and densely developed so have little 'availability' or re-development potential. As set out later in this chapter they should therefore be retained in their current form.

5.39 The sites with 'availability' have been assessed for their 'suitability' to support continued employment use as set out in Table 40 below. This has been informed by detailed site-based analysis as set out in Annex 2.

5.40 From this analysis it is evident that the office clusters in and around Bromley Town Centre have the highest 'employment quality scores' – London Road, Bromley North and Bromley South. While they all suffer from occupancy challenges reflecting wider macro-economic trends, they benefit from (a) being close to the amenities offered by the Town Centre, (b) ample parking and (c) adjacency to stations (i.e. Bromley North and Bromley South), all of which make them 'suitable' for future employment use. Bromley North also has the added benefit of having several more modern and higher quality office blocks (e.g. Newman Flexible Workspace, Royal Court and 1 Sherman Road).

Table 40: Suitability Assessment for Cluster C: Bromley Centre

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings	Proximity to Station	Proximity to Roads	Average Score
London Road	1.66	Office									3.9
Bromley North	4.18	Office									4.1
Bromley South	6.85	Office									4.3
Farwig Lane	2.36	Industrial									3.5
Mason's Hill	0.96	Office									2.8
Enterprise House	0.37	Industrial									2.4
Bencewell Business Centre	0.33	Industrial									2.9
Scrubs Farm	1.71	Industrial									2.9

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 2 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

5.41 At the other extreme most of the sites to the south of the cluster have lower 'employment quality scores', particularly Enterprise House, Bencewell Business Centre and Scrubs Farm. The main factors driving these lower scores are:

- The distance to railways stations – most sites are over two miles away from Bromley South, Hayes, Petts Wood and Orpington stations.
- The poor amenity offer around the sites – there are few shops, cafes, restaurants, pubs and bars available to workers.
- The low quality and ageing buildings – these generally do not meet the evolving needs of many modern occupiers in their current form.

- The high levels of vacant units and buildings at Bencewell Business Park and Enterprise House.

5.42 Given the combination of poor accessibility and low levels of occupancy it is debateable whether these three sites remain 'suitable' for traditional 'B-class' employment uses, particularly Enterprise House and Bencewell Business Centre. These sites might be better suited to other employment uses that are less sensitive to their location and serve a more local market. This is also the case for the Mason's Hill Office Cluster which has several large vacant buildings and is in a less optimum location when compared to other office areas such as Bromley North and Bromley South.

5.43 From a use perspective the office dominated employment areas of London Road, Bromley North and Bromley South are suitable for office and workspace uses (i.e. EG(i)/(ii))), and there may be an opportunity to introduce ancillary cafes, restaurants and other leisure uses to diversify the local offer and enhance the employment offer (see Table 41). If elevated vacancy rates continue for a sustained period across the three sites there may also be an opportunity to introduce some limited residential into these areas to support placemaking and regeneration ambitions though this needs to be balanced with projected future demand for employment space.

5.44 The more industrial areas are generally suitable for light industrial and light storage type space (i.e.B2/EG(iii)), as well as ancillary office and café type uses where sufficient demand might exist (see Table 41). Given the small size of these sites, alongside their proximity to residential areas, they are less well suited to more traditional and heavier industrial and wholesale type activities.

Table 41: Suitable Employment Uses for Cluster C: Bromley Central

Site	Office	Light Industrial	Industrial	Storage and Distribution	Workspace	Wholesale	Restaurants and Cafes	Leisure
London Road							Ancillary	Ancillary
Bromley North							Ancillary	Ancillary
Bromley South							Ancillary	Ancillary
Farwig Lane	Ancillary						Ancillary	Ancillary
Mason's Hill								
Enterprise House	Ancillary						Ancillary	Ancillary
Bencewell Business Centre	Ancillary							
Scrubs Farm	Ancillary							

Source: Avison Young, 2023

5.45 Using the intelligence set out above, combined with data collected during 'on-the-ground' site visits, a recommendation has been made for each site. As set out in Table 42 below, it is recommended that most of the sites within the cluster remain in their current form, including London Road, Bromley North[42], Farwig Lane, Waldo Road, Scrubs Farm and Parkside Business Centre – this is because most of these sites have uses that are suitable for their location and are well located and occupied.

5.46 Several sites could, however, be considered for re-orientation given they are suffering from low occupancy rates and/or are not ideally located for their current use type – these include Bromley South, Mason's Hill and Enterprise House. It is not recommended that they are released as there is an opportunity for them to continue to support traditional 'B-class' employment uses in a form that is more suitable to modern occupier expectations or, if necessary, an opportunity to introduce other employment uses that continue to support the local economy and enhance the offer for existing use types.

[42] Bromley North should be retained but it is recommended that the station car park is removed from the existing BIA boundary as it is unlikely to come forward for office-type development given changing demand for office-type uses.

Table 42: Recommendations for Cluster C: Bromley Centre

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Recommendations
London Road	1.66	0	Office: 2,716	The site is well-located close to amenities, public transport and parking making it suitable for continued use as an employment site. The recent upgrades to and occupation of 9 London Road and 15-17 London Road ("T Bromley") illustrate the potential that higher quality and flexible office space can offer for this part of the borough. It is therefore recommended that it is retained as an employment site, but if vacancy rates become a challenge it may be necessary to consider other 'B-class' and/or non 'B-class' employment uses that could be supported on site.	Remain
Bromley North	4.18	0	Office: 2,202	The site is well-located and sits immediately adjacent to Bromley North making it 'suitable' for continued use as an employment site. The existing office blocks to the east and south of the station (e.g. Newman Flexible Workspace, Royal Court, 1 Sherman Road and Northside House) are well-occupied and should be retained and remain designated. As with London Road, if vacancy rates become a challenge over time it may be necessary to consider other 'B-class' and/or non 'B-class' employment uses that could be supported on site. Given the changing macro-economic context relating to the office market it is, however, unlikely that new standalone office development is likely to come forward in this location. It may therefore be sensible to de-designate the main station area, including the car parks but excluding Northside House, to release much of it for mixed-use development. There may be an opportunity to require some high-quality employment space as part of development on this site, though other uses will need to be predominant due to viability constraints.	Remain with selective release
Bromley South	6.85	0	Office: 4,204	The Elmfield Road area sits to the north of Bromley South station and is home to a number of large office blocks that provide both traditional and flexible office options. Most buildings are, however, ageing and several blocks are vacant or in the process of being converted to residential uses. This links to high demand for residential uses as well as changing office occupier requirements, particularly in relation to a shift in demand towards high-quality, flexible space in locations with attractive environments and amenity offers. Elmfield Road does not provide this at present and there is a risk that its identity as an office location could be eroded if office space continues to be lost to residential uses and large occupiers (e.g. Bank of America) decide to consolidate and reduce their office footprint. It is recommended that the Elmfield Road part of the site *is* retained for office uses given its current identity and excellent location, but it needs to re-oriented toward an offer the better attracts modern occupiers. This should involve the provision of higher-quality flexible office options, as well as a mix of other uses that create a more vibrant and interesting environment that occupiers are increasingly demanding. This could include employment generating uses and some residential uses where it complements and enhances the employment offer. The other parts of the site are functioning better and office blocks remain well-occupied – although one is currently in the process of large-scale redevelopment. These remaining office assets should therefore be retained but again several of these do not suit modern occupiers so will need to be diversified if anchor tenants decide to consolidate or reduce their operations locally. The co-location of residential and high quality office uses at Perigon Heights provides an interesting precedent for the whole site.	Reorient and Co-Locate
Farwig Lane	2.36	0	Office: 625	Farwig Lane is a well-utilised and organised industrial estate close to Bromley Town Centre that is fully occupied by a mix of occupiers ranging from Russell & Bromley to Big Yellow Storage. There are few opportunities for	Remain

				intensification on any meaningful scale so it is recommended that the site is retained and protected in its current form.	
Mason's Hill	0.96	0	Office: 5,433	Mason's Hill hosts a number of ageing and lower quality office blocks several of which are vacant. It is likely that these vacancies do not fully reflect occupier demand given the scale of the buildings, but rather the termination of leases by the freeholders in anticipation of re-development. It is recognised, however, that in their current form these blocks are unlikely to attract sufficient occupiers to remain viable if advertised at market rates. It is therefore recommended that the site is no longer classified as an Office Cluster, but its location leaves it well-positioned for a range of other non 'B-Class' employment uses that could be considered instead of or alongside residential uses. Nearby smaller office blocks (e.g. Future House, Bromley Common) remain occupied and illustrate that the location could still work for some smaller-scale office provision moving forward.	Reorient
Waldo Road	0.66	0	0	The site hosts a small number of trade counter and wholesale type occupiers ranging from Benchmarx to Alltype Roofing Supplies. It is well occupied and densely developed with units surrounding a series of small yards and parking areas. While there is potential to re-organise and more efficiently use the extensive recycling centre and waste depot to the east and south of the site, these fall *outside* the red line boundary of this site. Within the boundary there is very little scope for intensification or redevelopment so it is recommended for retention. If the recycling centre and waste depot were re-organised and intensified it could unlock land for the development of additional employment space although there would be policy implications and limitations given its important function.	Remain
Enterprise House	0.37	0	Office: 932 General Industrial: 3,214	Enterprise House is a small site that has previously hosted both industrial and office activities. Most of the site is, however, currently vacant and the buildings that remain are of low and deteriorating quality. Given it is not ideally located for office type occupiers there is an opportunity to upgrade the existing stock and re-orientate it towards other 'B-class' employment uses that are not as sensitive to locational factors (e.g. light industrial uses).	Reorient
Beechwood Centre	0.23	0	0	The site is well-developed and well-occupied and there is no real potential for re-development or intensification. It is recommended that it is retained in its current form.	Remain
Bencewell Business Centre	0.33	0	Data not available[43]	Bencewell Business Centre provides light-industrial units for a number of different occupiers. It does suffer from some vacancy but this is likely to link to the low-quality nature of the units, constrained on-site parking and less than ideal location. It is not of a scale or form to be converted to support many other employment uses so it is recommended that it is retained or the units are re-developed to provide a higher quality offer to better attract occupiers.	Remain
Scrubs Farm	1.71	0	N/A	The site is well-occupied and home to a range of formal and informal activities within light industrial, warehousing and former agricultural buildings. While the site could be better and more efficiently organised to provide additional employment space, its distance from public transport, amenities and other employment sites makes it less 'suitable' for re-development than other sites in the brough so it is recommended for retention rather than intensification.	Remain
Parkside Business Centre	0.05	0	N/A	The footprint of this site is almost fully developed and occupied and there is no scope for intensification, particularly given its proximity to residential uses. It is therefore recommended for retention rather than re-development.	Remain

Source: Avison Young, CoStar and VOA, 2023

[43] Several vacancies noted on site visit but data on quantum unavailable.

Cluster D: North West Bromley

5.47 The North West cluster covers Bromley's most urban areas, including Anerley, Penge, Elmers End, Beckenham and Sydenham. It is one of the best-connected parts of the borough with stations providing direct services to Victoria, Charing Cross, Blackfriars, Croydon, Catford, Orpington and Bromley, as well as East London via the London Overground network. The area incorporates four designated sites that were appraised as part of this study which cover an area of 27.54 Ha and provide over 106,271 sqm of employment space. The sites are:

1. **Lower Sydenham:** A sizeable LSIS to the north east of the cluster that hosts a broad mix of industrial activities and has a 'traditional' industrial estate character, layout, location and function.
2. **Oakfield Road:** A slim and long LSIS to the north of Penge that was predominantly built in the 1960s alongside a large-scale post-war housing estate.
3. **Franklin Industrial Estate:** A compact LSIS site on a single plot close to Penge Town Centre that offers small low-quality workshops to local businesses, surrounded by a petrol station, car dealership and residential uses.
4. **Elmers End:** An LSIS site to the south of the cluster that is split across two areas:
   - A more modern and dense industrial estate to the north characterised by smaller modern light industrial units adjacent to a self-storage facility, factory and Royal Mail distribution centre.
   - A lower density and older industrial area dominated by wholesaler and trade counter type occupiers.

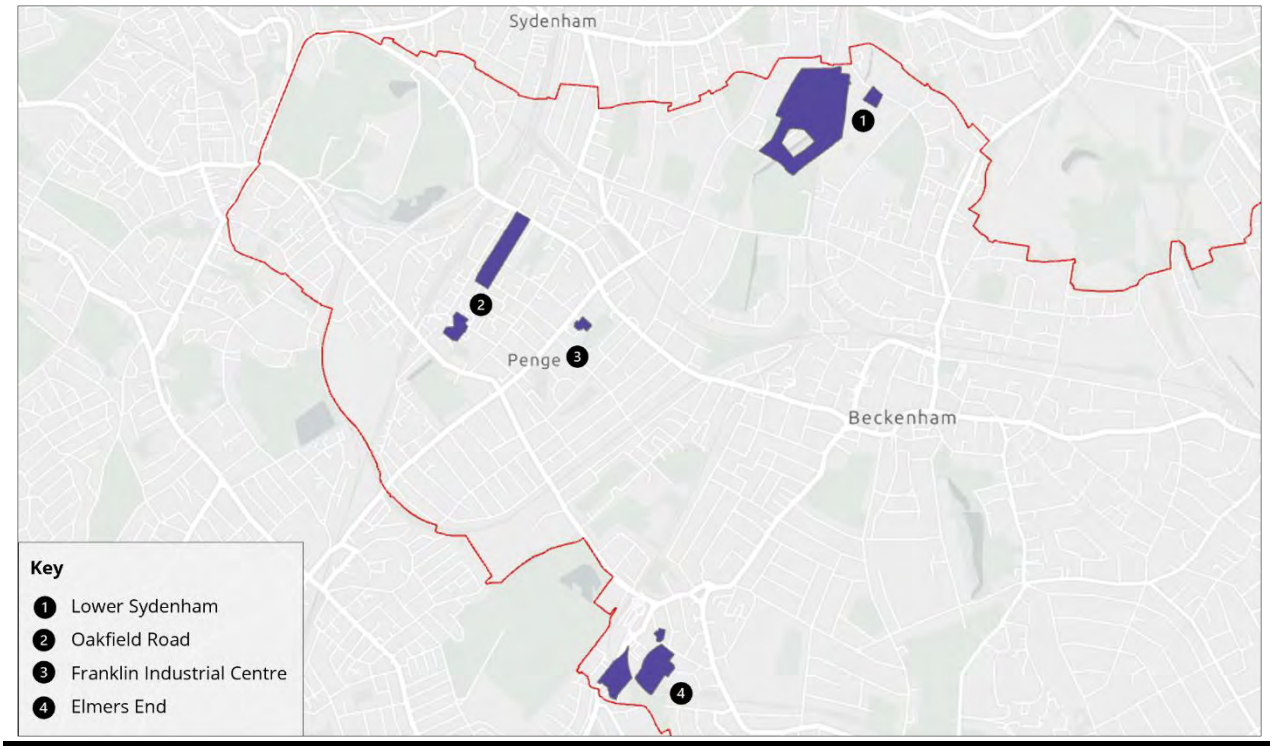


Figure 29: Cluster D: North West Bromley Sites
Source: LBB and Avison Young, 2023

5.48 While the four sites have very different characteristics all offer some levels of 'availability' primarily in the form of re-development opportunities or the intensification of open yet active space. In terms of the current situation for each site:

- **Lower Sydenham:** The site is well-developed and has a mix of medium-to-high quality units. There are not extensive opportunities for intensification, though there are open vehicle storage areas (e.g. Stagecoach and Clarkes Coaches) that could be better organised to unlock additional employment floorspace. There are also a couple of small unused plots, as well as a sports club with football pitches in the middle of the site. To the south of the site is a new development, Maybrey Works, which is primarily residential and less suitable for industrial type uses.

- **Oakfield Road:** The site is fully developed and characterised by low density and well spaced-out industrial buildings generally benefitting from ample loading and parking space. Re-development across the area, notably at the eastern end, could unlock more employment space. Selective re-development of large and well-located plots could bring forward additional floorspace or enable co-location with other uses including residential.
- **Franklin Road:** The site is a single block home to a range of different occupiers on short-term and informal leases. It is under single ownership so could conceivably be re-developed to provide additional floorspace but is unlikely to yield a significant uplift due to the constrained nature of the site and likely height restrictions. Viability will also be challenging due to the presence of the petrol station.
- **Elmers End:** The area to the north of the site is densely developed and there are few opportunities for intensification and re-development. The area to the south is lower density and ageing so could potentially be re-developed, though all units are occupied and fully functioning. There is a small vacant or 'available' plot to the west of the site which is currently fenced off and unused which could potentially present an opportunity for small-scale expansion.

5.49 Due to this 'availability' all sites have been assessed for their 'suitability' to support continued employment use as set out in Table 43. This has been informed by detailed site-based analysis as set out in Annex 2.

5.50 This assessment shows that the areas with the highest 'employment quality scores' are Lower Sydenham, Oakfield Road and Elmers End. While the sites have different characteristics, they are all accessible, appear to have sufficient parking and generally have uses that are appropriate for the areas they sit in. They are also all adjacent to mainline stations (i.e. Lower Sydenham, Penge West, Anerley, Elmers End and Birkbeck) that provide connectivity into central London and across South London. The defining features that make them all 'suitable' for continued employment uses include:

- Lower Sydenham is a self-contained industrial estate that has more modern units mixed with some older stock. It is generally well-managed and offers public transport connectivity to Central London, Beckenham, Catford and Lewisham via Sydenham Station and the Hayes Line. It is also just over five minutes' drive from the South Circular and has dedicated cycling infrastructure that provides an off-road route for cyclists along the scenic Water Link Way. Occupancy of both buildings and land is high across the site with only a small handful of vacant units and areas.
- Oakfield Road is an industrial area that sits adjacent to a railway line and 1960s housing estate which is likely to have been built around the same time as the industrial area. While parts of the site arguably lend themselves to residential uses, particularly at the eastern end due to its proximity to a London Overground Station, high street and regionally-significant park, it functions well as an industrial area with well spread out and occupied units.
- Elmers End is a dedicated industrial area that has a mix of 1960s and more modern units. It has highly disparate ownership but parts, particularly the southern end, are well-managed and maintained. It is close to but separate from surrounding residential areas and is adjacent to a Tesco superstore which also offers a café, opticians, petrol station and key cutting service. It is close to both Elmers End and Birkbeck Stations – the latter of which offers tram connectivity across South London making it accessible to a broad workforce. No vacancies were recorded on site suggesting demand is high for space in the area.

5.51 While Franklin Road scores lower than the other sites it remains 'suitable' for employment uses. Its lower score is driven by the fact it is low quality, ageing and offers very little parking or servicing space, but it is fully occupied and is valued by tenants as it one of the only facilities in the borough that offers very small 'urban' workshop type space for local makers and producers. It is also well-located close to Penge Town Centre and is relatively near to Kent House and Clock House stations.

Table 43: Suitability Assessment for Cluster D: North West Bromley

Site	Size (Ha)	Dominant Use	Location Character	Building Age	Amenities	Access and Parking	Vacant Land	Vacant Buildings		Score
Lower Sydenham	16.38	Industrial								4.25
Oakfield Road	4.82	Industrial								4.1
Franklin Industrial Estate	0.41	Industrial								3.1
Elmers End	5.93	Industrial								4.3

Source: Avison Young, 2023 Note: Green = High Score (5/4), Orange = Medium Score (3), Red = Low Score (1/2). Note: Evidence presented in Annex 2 indicates some of the strengths and weaknesses of the sites which has informed the judgements set out in this table.

5.52 In terms of future uses Lower Sydenham, Oakfield Road and Elmers End are suitable for similar types of industrial uses, including light industrial, general industrial and wholesale (i.e. B2/EG(iii)). While storage and distribution uses are suitable (i.e. B8) this is primarily on the lighter or 'micro' end of the scale – they would not be suitable for large logistics type space as they are not adjacent to large trunk roads and all are close to low-rise and dense residential areas. Franklin Road Industrial Estate is much smaller and more constrained so is unlikely to be able to accommodate more than office and light industrial type uses.

Table 44: Suitable Employment Uses for Cluster D: North West Bromley

Site	Office	Light Industrial	Industrial	Storage and Distribution	Workspace	Wholesale	Restaurants and Cafes	Leisure
Lower Sydenham	Ancillary						Ancillary	
Oakfield Road	Ancillary						Ancillary	
Franklin Industrial Estate								
Elmers End	Ancillary						Ancillary	

Source: Avison Young, 2023

5.53 Using all the above as a basis, as well as a consideration of wider factors, an overarching recommendation has been made for each site based on what is both 'achievable' and suitable. As shown in Table 45 Lower Sydenham has been identified for intensification because unlike most of the other sites it has clear and potentially 'achievable' plots that could lead to an uplift in employment floorspace if intensified. Oakfield Road could be intensified significantly if it is re-developed holistically, but it would be more feasible for large individual plots at the eastern end to be re-developed to provide more dense employment uses or mixed-use schemes incorporating employment, residential and other town centre uses. Elmers End and Franklin Road have fewer opportunities for development given the constrained nature of the sites so it is recommended that both are retained as employment sites.

Table 45: Recommendations for Cluster D: North West Bromley

Site	Size (Ha)	Vacant Land (Ha)	Vacant Floorspace by Use (SQM)	Commentary, including delivery challenges	Recommendations
Lower Sydenham	16.38	0.04	Office: 5,723 General Industrial: 2,098 Warehousing: 3,117[44]	Much of this large site has modern and well-occupied industrial type properties that should be retained and protected. While there are not ample opportunities for intensification, there are open vehicle storage areas and a couple of small unused plots which present opportunities for re-organisation and intensification to unlock additional employment floorspace. These characteristics, alongside others, illustrate that there is potential to upgrade the area to from an LSIS to a SIL (see Appendix IV for more). Within the middle of the site there is a sports club with footfall pitches. While this technically falls outside the red line boundary of the site, it is surrounded by employment uses, including heavier and 'dirtier' type industrial activities, which makes it a less-than-ideal location for this type of activity. While it could be considered for conversion, particularly given the number of sports pitches locally, the borough's draft *Playing Pitch Strategy* identifies it as important and in need of improvement. To the south of the site a new development, Maybrey Works, has recently been brought forward. While it is currently part of the LSIS it could be released as it has a primarily residential function and is severed from the heart of the industrial area by the railway line. It could still contribute to the functioning of the employment area through the provision of ancillary services (i.e. shops, cafes, eateries etc) but its current configuration does not lend itself to the more industrial type activities that are driving demand for commercial space locally.	Intensify
Oakfield Road	4.82	0	0	The site is well-functioning, home to a mix of different industrial occupiers and well-located meaning it should be retained as an employment location. Given its highly residential character, proximity to amenities and accessibility via Penge West and Anerley stations, it does, however, present opportunities for co-location and mixed-use development incorporating traditional 'B class' activities, other employment uses and residential. Specific plots lend themselves well to this, or simply more intense employment uses, at the eastern end of the site (i.e. Homebase and Ametek), and there is a vacant plot at the western end that is just outside the boundary that could be used in this way. There is a precedent for co-location already on the road as there is a new health scheme surrounded by residential uses at the western end (Oaks Park Medical Centre), and the two halves of the site are punctuated by residential uses already.	Intensify and/or Co-Locate
Franklin Industrial Estate	0.41	0	0	The site is fully occupied and valued by occupiers so should be retained as an employment site. If a re-development scheme comes forward the workshop and maker type space should be re-provided as it is one of the only facilities of its type in the borough. There is scope to dramatically improve and enhance the quality of the commercial offer, but this should be balanced with the retention of genuinely local small businesses.	Remain

[44] A large proportion of vacancy across use types is being driven by a recently-listed large, high quality, and expensive property that provides a mix of office and industrial activities (Stanmore Steel Building).

Elmers End	5.93	0	General Industrial: 278	Both parts of the site are fully occupied and reasonably well developed. There is little scope for intensification without comprehensive development of the southern part of the site so it is recommended that it is retained, but that any proposed schemes that retain the function and scale of existing 'B-class' type uses are considered. The most northern segment of the site which used to be home to office blocks has undergone office to residential conversions via Permitted Development Rights so does not need to be retained within the existing red line boundary of the site. It is worth noting that there is a fairly small area of low-quality green space at the north east end of the northern part of the site outside the red line boundary. This could provide a small amount of additional employment capacity if needed which would likely be taken up based on market trends in the area. There is also a small area of grass in southern part of the site within the boundary that could be developed to provide more floorspace.	Remain

Source: Avison Young and CoStar, 2023

Focus On: Bromley's Affordable Workspace

As set out in Chapter 3, affordable workspace refers to more than just low cost workspace available below market rents. Instead, it incorporates workspace that reduces barriers to entrepreneurs to entering the market which can take several forms (e.g. rent free periods, all in rents, equipment provision, business rates, fit out loans etc).

Each sector has different requirements in relation to affordability and therefore provision in an area should align with these requirements. Drawing on conclusions from the *Bromley Economic Evidence Base* (2023) the bullets below set out the borough s priority sectors and highlights some of the space requirements of their small and start up businesses:

- Arts & Creative: Typically require creative studios and/or light industrial space. Often price sensitive so low cost space is often a priority, alongside a preference to be around likeminded businesses.
- Professional, Scientific & Technical: Typically require co working or office type space. Often require all in rents to take advantage of economies of scale, and prefer flexible lease terms in case of expansion or contraction.
- Financial & Insurance: Similar to the above but more often require smaller private offices due to the sensitivity of their work.
- Transport & Storage: Typically require light industrial or industrial space. Dedicated private space preferred for security with rent free periods and flexible terms valued to allow businesses time to establish themselves and cover upfront capital costs.

Based on the review of flexible type workspaces set out in the *Bromley Economic Evidence Base* (2023), it is clear that the borough has several options available for cleaner' businesses in the Professional, Scientific & Technical and Financial & Insurance sectors. Examples include Anerley Business Centre, Contingent Works, Regus, Newman Flexible Workspace, Devonshire House Flexible Workspace and Desk Team. Some of these are available at accessible rents through hot desking or subscription based arrangements, which can flex based on the success and/or turnover of a business.

In contrast, provision for the arts and creative sector is limited. Until recently the only option has been the Priory in Orpington which offers artists and creatives private studios on relatively flexible terms. The studios are over 400 sq ft and command reasonably strong rents (c£20 22psf) lending themselves to small commercial businesses rather than individual artists. The newest provision is Anerley Works on Anerley Road which is still under construction. This will provide individual studios for artists and creatives across South East London given its proximity to the Overground station at Anerley.

Similarly, provision of dedicated light industrial units for small businesses is lacking across the borough, particularly impacting start up businesses in the Arts & Creative and Transport & Storage sectors. There are a number of small' light industrial units available that will be attractive to some smaller established businesses (e.g. Klinger Industrial Park, Abbey Trading Estate and Metro Business Centre), but these are not generally available on the flexible terms start ups require, and do not specifically look to cluster likeminded businesses together. This makes them less attractive to start up businesses which often have high barriers to entering the market.

Current Availability and Future Supply

5.54 Information presented in this chapter illustrates that across the four clusters there is some existing supply available that will help satisfy a portion of future demand. At the time of writing, across the sites appraised there are 31 vacant properties with around 32,300 sqm of available floorspace. By use class this equates to:

- 17 office (EG(i)/(ii)) properties, with c.20,800 sqm of available floorspace.
- 10 general industrial (B2/EG(iii)) properties, with 8,400 sqm of available floorspace.
- 4 warehousing (B8) properties, with c.3,100 sqm of available floorspace.

5.55 CoStar data (mid-2023) indicates that there is further availability in other parts of the borough as well:

- 11,700 sqm of available office (EG(i)/(ii)) floorspace.
- 1,162 sqm of available general industrial (B2/EG(iii)) floorspace.
- 650 sqm of available warehousing (B8) floorspace.

5.56 The availability of office space (EG(i)/(ii)) across the borough may help to meet some future demand given the quantum available. There are, however, limitations with much of the stock that is available influencing its suitability and attractiveness for future occupation. For example some available office space is:

- In poorly connected and areas that are not particularly attractive to occupiers (e.g. at Crayfields Business Park).
- In low-quality buildings that are not appealing to most modern occupiers, particularly those looking to consolidate their portfolios following the rise of hybrid working (e.g. the vacant Bromley Business Centre on Hastings Road).
- In in a traditional large floorplate format which is less desirable to modern occupiers who are increasingly looking for smaller and flexible offices spaces (e.g. along Elmfield Road in Bromley South).

5.57 The availability of general industrial (B2/EG(iii)) and warehousing (B8) floorspace may also meet some demand but it is not likely to be sufficient to meet future demand, particularly given much vacant stock is likely to be unattractive to occupiers in its current form and is therefore unlikely to be re-used without some form of investment or reconfiguration.

5.58 Looking to the future, the borough's development pipeline could further impact the borough's employment floorspace supply and availability. As shown in Table 46 below, which draws on data from LBB, it is evident that there at mid-2023 there is a total of 16 unimplemented or under construction planning permissions for employment development in the borough which, if implemented in full, could provide +20,071 sqm of additional employment floorspace in net terms.

5.59 Broken down by use class, this activity could deliver +21,665 of warehousing (B8) floorspace and +201 sqm of office space (EG(i)/(ii)) counter-balanced by the expected loss of around -1,795 sqm of general industrial space (B2/EG(iii)) if fully implemented.

Table 46: Extant Planning Permissions in Bromley (SQM) (2023)

Office (EG(i)/(ii))	General Industrial (B2/EG(iii))	Warehousing (B8)	Total
+201	-1,795	+21,665	+20,071

Source: London Development Database and LBB, 2023

6. Future Requirements: Considering Current and Future Employment Space Requirements

Chapter Summary

This chapter provides an overview of commercial typologies that are (a) suitable for Bromley and (b) more intense than existing commercial assets across the borough. These typologies are applied in the next chapter on place based propositions to determine how much additional floorspace could be delivered if these typologies are introduced in the opportunity areas identified in the preceding chapter. To summarise:

- This chapter starts by setting out the characteristics of the six opportunity areas identified and illustrates existing uses, potential opportunities and key connections.
- Borough wide sector based growth areas and trends are then presented which provide an indication of the likely demand across industrial sizes and spatial requirements.
- Using this as a basis, six Bromley specific commercial typologies are set out alongside relevant spatial and design parameters. These typologies have been developed to both help meet anticipated demand in an efficient manner and to deliver intensification in a way that contributes positively to the surrounding environment.
- The final section sets out design based considerations for the adaption and reuse of existing office stock within the borough. This reflects the fact that some of the current stock in Bromley Town Centre and other parts of the borough does not meet the requirements of modern occupiers from both a typological and place based perspective.

Bromley's existing employment areas and opportunities

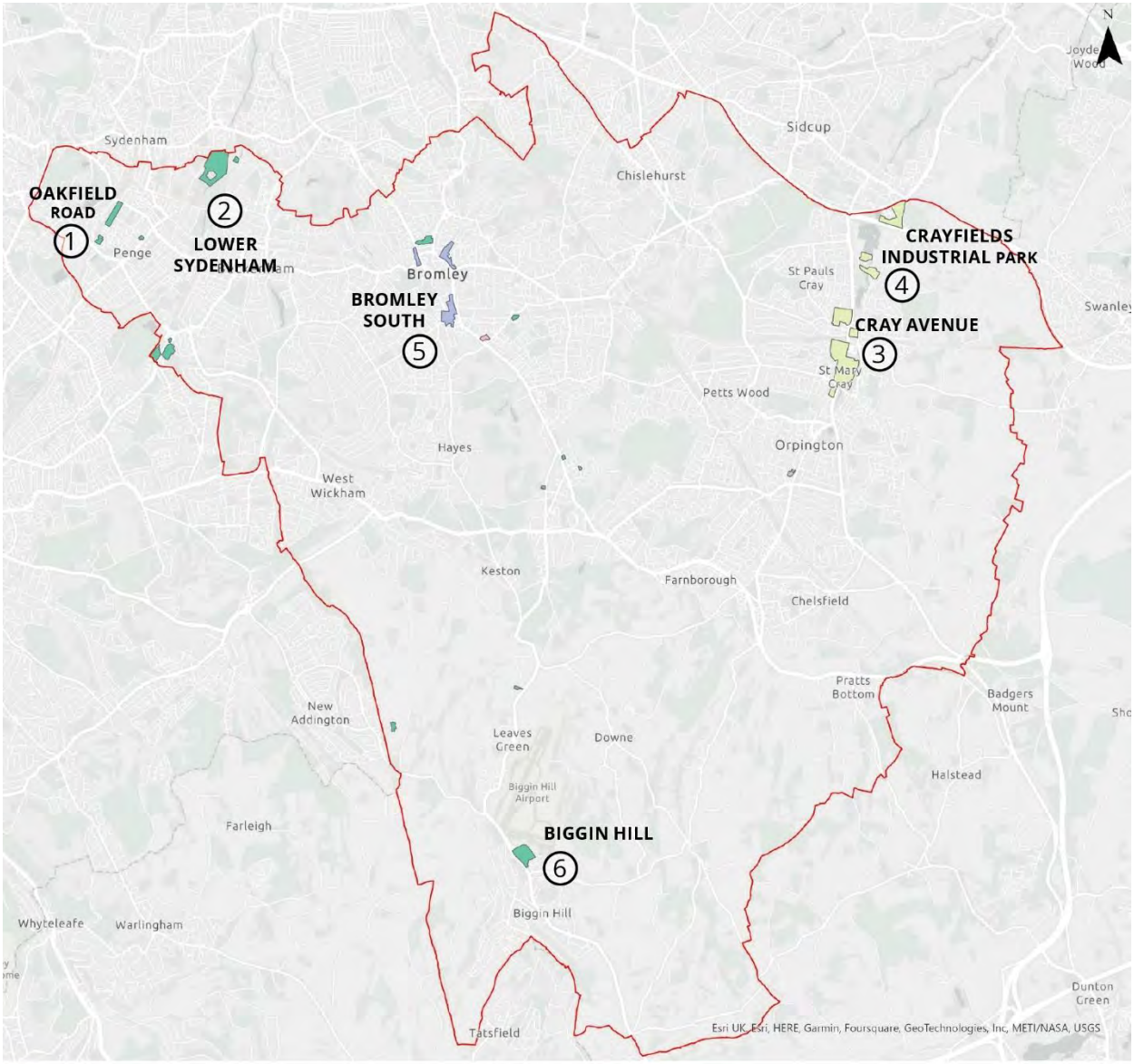
6.1 Bromley has a wide range of employment sites distributed fairly evenly across the borough. These range from very small sites, comprising one or two plots (e.g. Enterprise House) to larger areas that contribute significantly to the economic function of the borough and Greater London (e.g. Cray Avenue). Not all these sites, however, present equal opportunities for transformation, redevelopment or intensification.

6.2 To understand the nature of existing employment areas, desk-based site audits as well as site visits have were undertaken for 29 designated employment areas as well as undesignated sites identified as having potential redevelopment or intensification opportunities. As set out in the preceding chapter, each site has been assessed using the following three criteria:

1. Availability: are there vacant plots or areas that are underutilised.
2. Suitability: are sites 'suitable' for continued employment use based on the criteria set out in the PPG.
3. Achievability: for sites that have been identified as having availability and are 'suitable', a recommendation has been made to either retain, intensify, co-located or re-orient.

6.3 Through this process, six sites have been identified as having the greatest opportunities for intensification or re-orientation: Oakfield Road, Lower Sydenham, Cray Avenue, Bromley South, Crayfields Industrial/Office Park and Biggin Hill. The location of these sites is illustrated on the diagram below alongside the recommendation identified in the preceding chapter and their key spatial opportunities. It will be these sites have been taken forward for placed-based propositions that sets out a vision and spatial opportunities for each area (see next chapter).

6.4 The remainder of this section presents an overview of the initial baseline work to establish the character, employment typologies, infrastructure considerations, and opportunities for each of these six sites. This analysis forms the basis for both the development of Bromley-specific typologies set out in the next section and the place-based propositions in the subsequent chapter.



Strategic Industrial locations

Business improvement areas

Locally Significant Industrial Sites

1 Oakfield Road
Intensify and co-locate:
- older / lower density units
- vacant site

2 Lower Sydenham
Intensify:
- open vehicle density areas
- small unused plots
- public realm improvements

3 Cray Avenue
Intensify:
- vacant sites
- car parking spaces
- areas of open storage
- older / lower density stock

4 Crayfields Industrial
Extend and re-orient
- areas of existing car parking
- expansion of the site
- vacant office building
- ageing office stock to the north

5 Bromley South Area
Re-orient and co-locate
- ineffecient car parking (northern areas of the site)
- retrofit / redevelopment

6 Biggin Hill
Retain and intensify
- hardstanding areas

Figure 30: Bromley's Six Opportunity Employment Sites
Source: Avison Young and Maccreanor Lavington

Oakfield Road

6.5 Oakfield Road is a well-occupied LSIS characterised by medium-scale light industrial buildings. Industrial uses are low-density with a significant portion of area given over to access, servicing routes and parking areas. General industrial and warehousing make up the majority of typologies with builders' merchants, wholesale, manufacturing and self-storage facilities. The surrounding context is predominantly low-rise suburban residential. The area is well served by public transport with Penge West Station to the north, Anerley to the south and Penge East to the east, but it is not well connected to the strategic road network.

Existing Context

- Residential
- Cycle route
- Railway
- Primary connection
- Service route
- Surface car park
- Service yard
- Pedestrian link
- Activate frontage
- Poor quality frontage
- Flooding risk area
- Medical centre

Wickes building merchants
Wholesale warehousing

Jewson building materials
Yard-based industry

Trading estate
Medium warehousing

Site area: 4.82ha
PTAL: Good (3-4)
Existing uses: medium warehousing and light industrial
Potential uses: light industrial, small-scale storage / distribution, wholesale, restaurants and cafes, office (ancillary)

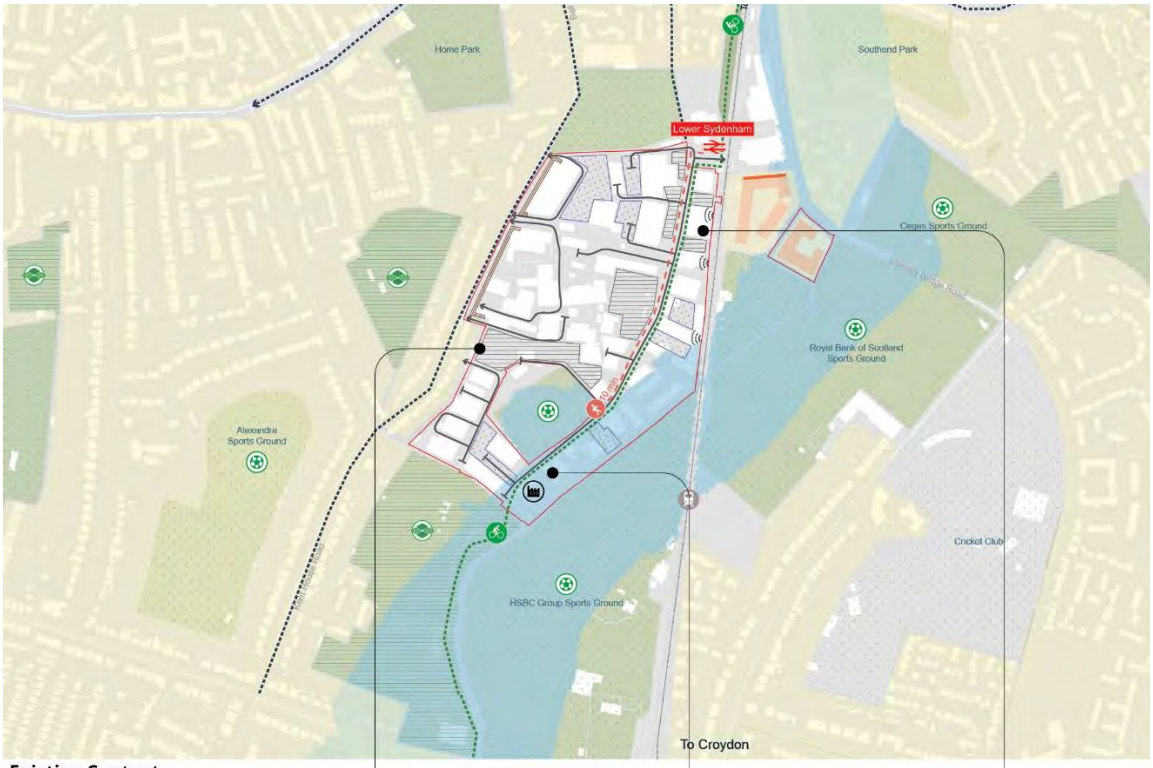
Site opportunities

- Redevelopment of older stock on larger, well-located plots
- Industrial uses as buffer to rail lines
- Potential co-location with residential, particularly north-east area close to Penge West station and the High Street
- Homebase and Ametek sites offer potential for a larger, mixed-use development
- Consolidation of parking and servicing

Figure 31: Oakfield Road Context and Opportunities
Source: Avison Young and Maccreanor Lavington

Lower Sydenham

6.6 Lower Sydenham is a medium LSIS in the north-west corner of Bromley and one of the primary industrial centres in the west of the borough. It has a self-contained, traditional industrial estate character and layout and is comprised largely of general industrial, warehousing and ancillary offices. There are high levels of occupancy and units are generally medium to high-quality. It is bounded to the east by the rail line with Lower Sydenham station located at the northern end of the site. The remaining edges are a mix of open green space, including sports pitches in the centre of the LSIS, allotments and residential uses.



Existing Context

- Residential
- Cycle route
- Railway
- Primary connection
- Service route
- Surface car park
- Service yard
- Heavy industry
- Activate frontage
- Poor quality frontage
- Flooding risk area
- Sports pitch
- Allotment
- New mixed-use resi

Kent House Lane
Mix of residential and light industry

Treatment works
Heavy industry site on Kangley Bridge Rd

Howdens kitchens
Light, medium Industry character of large areas of Lower Sydenham

Site area: 16.38.ha
PTAL: Low (2)
Existing uses: general industrial, warehousing and some offices
Potential uses: light industrial, storage/ small-scale distribution, wholesale, restaurants and cafes and offices

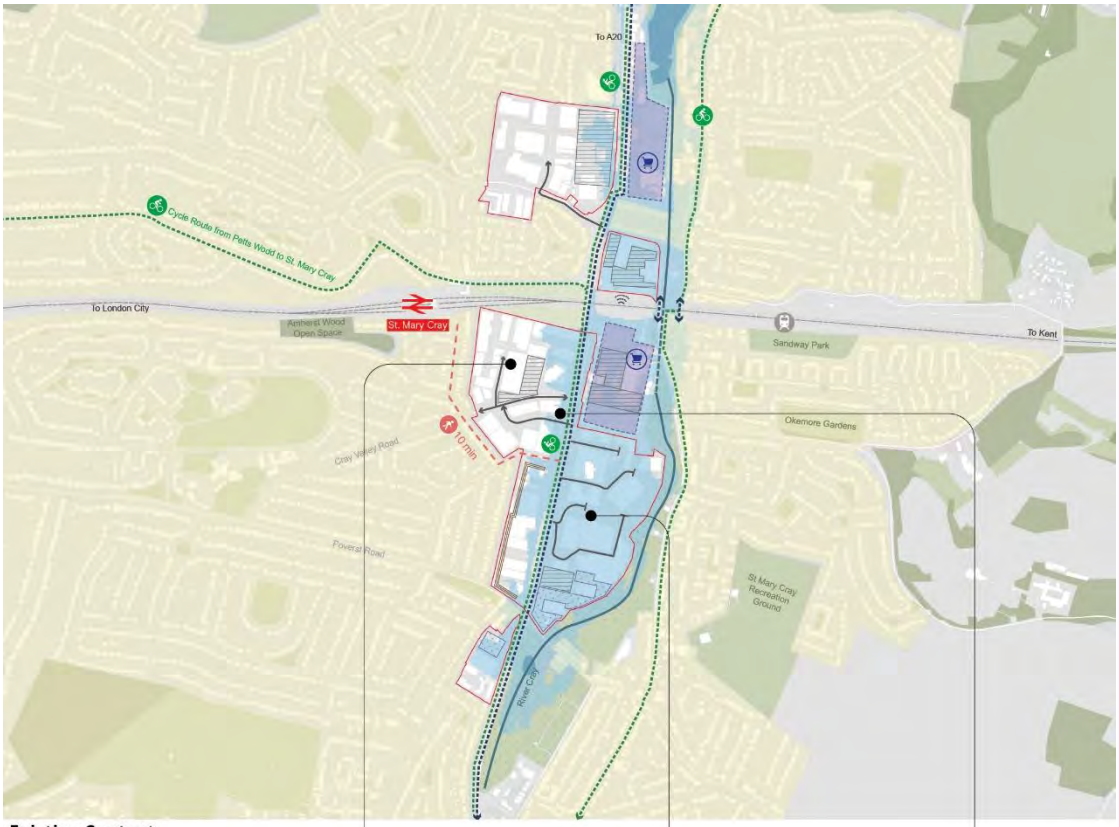
Site opportunities

- Open vehicle storage areas (Stagecoach and Clarkes Coaches)
- Small unused infill plots that could come forward
- Potential to redevelop older stock
- Intensifying a key industrial site and building on the unique use profile of productions services, bakeries, etc

Figure 32: Lower Sydenham Context and Opportunities
Source: Avison Young and Maccreanor Lavington

Cray Avenue

6.7 Sevenoaks Way / Cray Avenue is part of the Crayfields Business Corridor SIL, the largest industrial employment centre in Bromley. It consists of four separate sites along Cray Avenue which are punctuated by parcels of residential uses, green space, the rail line and Nugent Shopping Park. It is a well-occupied area with a reasonably good-quality environment with several new and upgraded industrial units. It is within walking distance of St. Mary's Cray station, and is supported by some dedicated cycling infrastructure and a range of amenities within the Shopping Park. ts proximity to the A20, which links to the M25, is a large driver of employment in this location.



Existing Context

- Residential
- Cycle route
- Railway
- Primary connection
- Service route
- Surface car park
- Service yard
- Retail park
- Activate frontage
- Poor quality frontage
- Flooding risk area
- River Cray

Orpington retail park
Mix of light industrial and big-box retail characteristic of Cray Ave

DBR2 Amazon
New Amazon distribution centre

Halo business park
Contemporary, high-quality light industrial trading estate

Site area: 32.56ha
PTAL: Good (3-4)
Existing uses: general industrial
Potential uses: light industrial, storage and distribution, wholesale

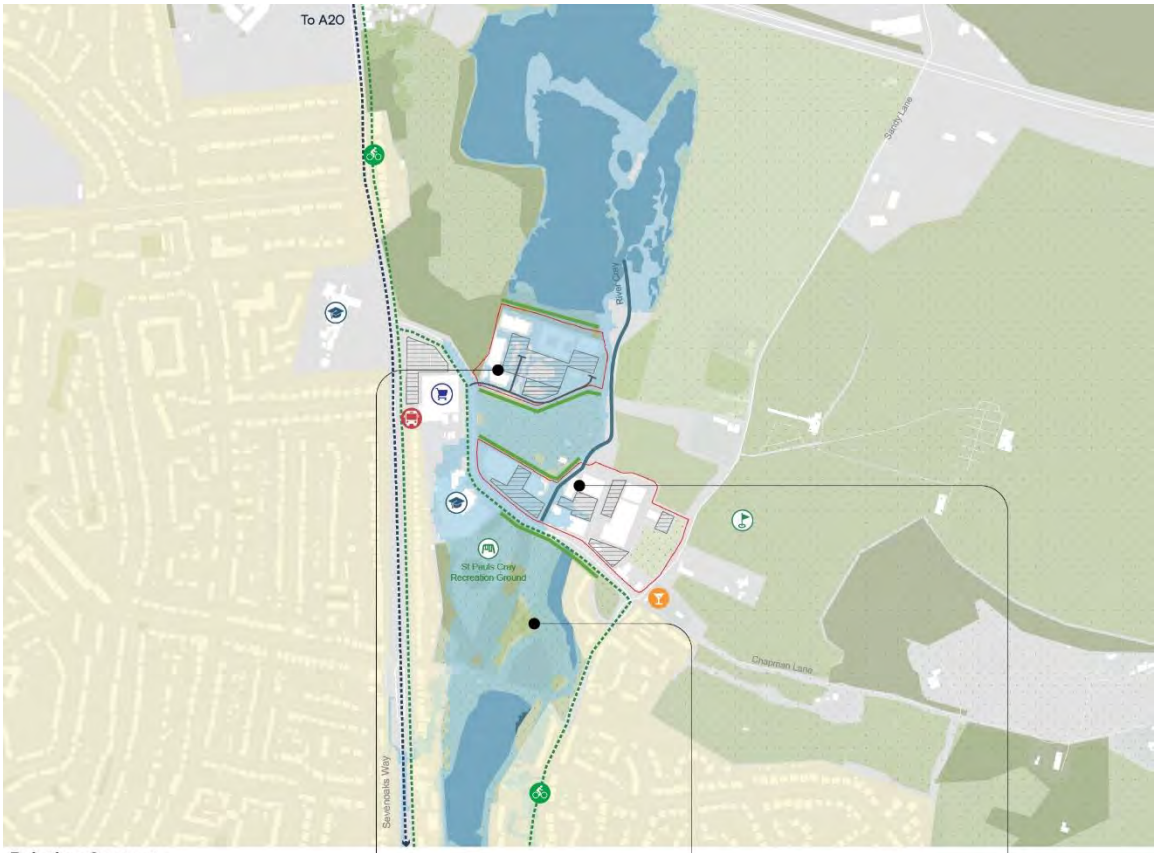
Site opportunities

- Areas of open storage and car parking
- Some older, lower density, single storey buildings
- Intensification of uses to capitalise on the strategic nature of the site
- Improving the relationship to adjacent environmental features

Figure 33: Sevenoaks Way / Cray Avenue Context and Opportunities
Source: Avison Young and Maccreanor Lavington

Crayfields Business / Industrial Park

6.8 Crayfields Business and Industrial Park are two sites located off Sevenoaks Way and bisected and surrounded by open green infrastructure along the River Cray. To the north, Crayfields Business Park is a self-contained, 'office-park' typology comprised of stand-alone, low-density offices surrounded by surface car parks. To the south, the Industrial Park is a relatively modest provision of small-to-medium scale, medium-to-high quality units. The proximity of these units to the A20 makes them highly attractive to occupiers.



Existing Context

- Residential
- Cycle route
- Railway
- Primary connection
- Service route
- Surface car park
- Service yard
- Big-box retail
- Education
- Pub
- Green edge
- Flooding risk area
- River Cray

Crayfields Business Park
Campus style office clusters

Watermeadows Park
Greenbelt land surrounding the site

Crayfields industrial park
Light industrial trading estate

Site area: 5.56ha
PTAL: Very poor (0-1)
Existing uses: general industrial, office
Potential uses: light industrial, whole-sale, office and workspace

Site opportunities

- Limited opportunities for intensification
- Potential redevelopment of ageing office stock becoming less attractive to the market
- Consolidate car parking
- Enhance environmental attributes to the site and connect to the surrounding greenspaces

Figure 34: Crayfields Business / Industrial Park Context and Opportunities
Source: Avison Young and Maccreanor Lavington

Bromley South

6.9 Bromley South Area is the southern part of Bromley Metropolitan Town Centre and is largely comprised of medium-to-large offices blocks with some residential and supporting ancillary uses. It is a designated Business Improvement Area and part of the main commercial and employment centre of the borough. It is highly accessible, centred around Bromley South Station and has good access to high-quality amenities within the site and neighbouring green spaces. It suffers however from lower-quality public realm and car-dominated infrastructure particularly along Elmfield Road.

Existing Context

- Residential
- Cycle route
- Railway
- Primary connection
- Service route
- Surface car park
- Service yard
- Retail centre
- Office district
- Multi-storey car park
- Listed building
- Vacant building
- Flooding risk area
- Poor quality frontage
- Poor boundary edge

High Street
Mix of retail, f+b, offices, leisure serving the wider borough

Acorn Group
New high-density mixed-use developments coming forward

Elmfield Rd
Corridor of medium-large scale offices buildings

Site area: 6.85ha
PTAL: High (6a)
Existing uses: office, ancillary
Potential uses: office and workspace, supporting ancillary uses (cafes, leisure uses, restaurants)

Site opportunities

- Limited obvious development opportunities
- Re-orient office space to attract modern occupiers
- Co-location with other uses that contribute to a more vibrant town centre atmosphere
- Co-location with residential to support activity

Figure 35: Bromley South Context and Opportunities
Source: Avison Young and Maccreanor Lavington

Biggin Hill

6.10 Biggin Hill is a medium-sized LSIS adjacent to Biggin Hill Airport that primarily comprises airport related functions, the F1 management centre and Concorde Business Centre. Its strategic location next to the airport makes it attractive to aviation and specialist industries. It is well connected to the strategic road network via the M25 but very poorly accessible by public transport. Located at the southern end of the borough, the immediate context is characterised by pockets of residential in countryside and greenspaces.

Existing Context

- Residential
- Airport
- Bus route
- Primary connection
- Service route
- Walking trail
- Surface car park
- Landmark
- Cafe
- Museum
- Trading estate
- Vacant plot

Biggin Hill Airport
Small planes and jets airport

Formula 1 HQ
Formula One management centre

Industrial estate
Airport trading estate

Site area: 7.19ha
PTAL: Very poor (1b)
Existing uses: light industry (airport related)
Potential uses: office and workspace, light industrial, wholesale, supporting ancillary uses

Site opportunities

- Limited obvious development opportunities
- Hardstanding areas within the site
- Areas of car parking
- Contributing to the long-term growth and functioning of the airport

Figure 36: Biggin Hill Context and Opportunities
Source: Avison Young and Maccreanor Lavington

Bromley sector-based opportunities

6.11 The second step in developing bespoke Bromley typologies has been to consider the existing and emerging employment sectors that are likely to experience growth and their corresponding spatial requirements. While certain sectors may be able to sit comfortably within multiple typologies, others have unique requirements (e.g. loading bays that can accommodate HGVs) or can be more challenging to co-locate.

6.12 Although the projected floorspace demand is split between industrial (+33,629 to 55,623 sqm[45]) and office (+55,294 to 70,119 sqm), there will *not* be requirement for a net gain in floorspace for offices due to the changing nature of occupier requirements. This is discussed in more detail in the final recommendations and conclusions chapter.

6.13 As such, the primary focus for typology development has been on providing a range of spaces that that can accommodate the spatial and operational requirements for the anticipated industrial growth sectors set out in the table below.

6.14 There will, however, also be a need to ensure that existing offices meets the needs of modern occupiers in the expected growth sectors. Among other macro-economic trends set out in Chapter 3, occupiers are increasingly prioritising health and wellbeing, flexibility and smaller floorplates. The following section therefore also outlines some of the current workspace demands and trends and provides high-level criteria to assess whether existing office stock can likely be retrofit or repurposed to meet these demands.

Table 47: Bromley's Industrial Sector Opportunities

Industrial growth sector	Typical existing spatial typology	Location drivers	Units	Collocation (Low - high)
Land transport, storage and post (Heavy)	Distribution centre, open-air storage, warehousing	E Bromley NW Bromley S Bromley	L / XL	Medium. Often stand-alone.
Land transport, storage and post (Micro)	Trading estate, light industry warehousing	E Bromley NW Bromley S Bromley Bromley Centre	XS / S	High
Wholesale	Distribution centre, warehousing, trading estates	E Bromley NW Bromley S Bromley Bromley Centre	M	High. Particularly smaller units
Construction	Island and yard, open-air storage, warehousing, trading estate	E Bromley N Bromley	XS / S / M	Medium. For smaller units / lighter industry
Manufacturing	Trading estate, warehousing, island and yard	E Bromley NW Bromley	Light: XS / S / M Heavy: M / L	Medium. For smaller units / lighter industry

*Typical unit sizes: XS: 0-50sqm; S: 50-200sqm; M: 200-500sqm; L: 500-2000sqm; XL: 2000+sqm

[45] This figures represent the sum of demand for General Industrial (B2/EG(iii)) and Warehousing (B8).

Bromley-specific typologies

6.15 This section sets out industrial typologies for Bromley that respond to the projected sector demand, the spatial opportunities identified and how these typologies can contribute positively to the character and qualities of employment areas.

6.16 These spaces range from large-scale distribution and warehousing to small-scale units that can support creative production or manufacturing. As pressures on industrial land across London continue to increase a key challenge will be how to accommodate these uses, often in urban locations, while mitigating negative impacts associated with industry and contributing positively to places. The purpose of developing bespoke typologies is therefore to:

- Accommodate the demand for industrial floorspace through moderate intensification or co-location of industrial uses.
- Improve and build on the existing place-based qualities of each area through a series of high-level urban design principles.

6.17 Underpinning the development of these typologies is an understanding of how the demand across the predicted growth sectors translates to industrial size bands. This is set out in table below and has informed the unit sizes and their distribution within the typologies.

Tablet 48: Industrial Units by Size Band

	Industrial units by size band (sqm)					
B2 and B8 sizes bands	**0 200**	**200 500**	**500 1000**	**1000 5,000**	**5,000 10,000**	**10,000+**
Proportion of total B2/EG(iii) (industrial) and B8 (warehousing) by size band	12%	20%	22%	39%	6%	1%

Source: CoStar (2023)

6.18 Consideration has also been given to which uses and unit sizes could comfortably sit together, or be 'co-located', and which would more likely stand-alone:

I. Stand-alone typologies occupy the entire plot boundary and are typically single-use occupiers. Often the most common form of industrial development, they are typically preferred for heavier industry, security reasons, or yard-based activities.
II. Horizontal co-location is where two uses sit side-by-side on the same plot. A common existing form of development across Bromley, this is generally the easiest approach to moderately increasing density for most light-industrial uses while maintaining direct street-access for each unit, a key preference for many industrial uses.
III. Vertical co-location is where uses sit directly on top of each other. Though examples are coming forward across London with larger industrial units, this is typically more appropriate for smaller industry where frequent access to loading / servicing is not as important. A complicated and expensive form of development, it is likely to only be appropriate in areas with very high levels of demand.

6.19 In line with the above demands and considerations six typologies have been developed that respond to three scales of industry. These have been set out on the following pages alongside key design considerations.

Typology A: XS and Small-Scale Light Industry

Typology A caters to smaller-scale industrial activities and businesses that would typical be found in trading estates, creative workspaces or small light-industrial units. Activities in these areas tend to require a modest amount of yard-space / loading area that can be shared and are 'light' enough uses to co-exist in close proximity.

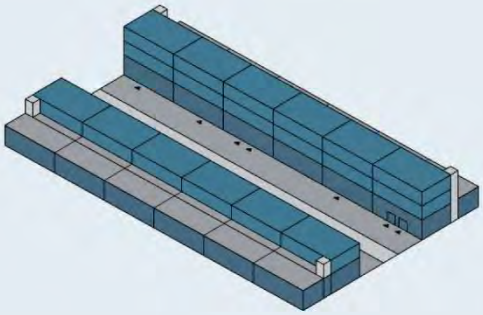
Two degrees of intensification have been proposed, illustrated opposite, that can correspond to varying levels of demand across the borough. Typology A.1 is primary comprised of 1-2 storey (or 1 storey + mezzanine) units with each unit having ground floor access from the shared service yard. This reflects a typical trading estate typology found in existing employment across Bromley.

Typology A.2 is a higher-intensity version that vertically stacks small units with 15-30% of units having direct ground floor access. Upper levels units are accessed via goods-lifts. It has been included as a 'future-oriented' typology that can serve to catalyse industry in an area, co-locate businesses to free up other sites for redevelopment, or respond to increased demand of industrial land.

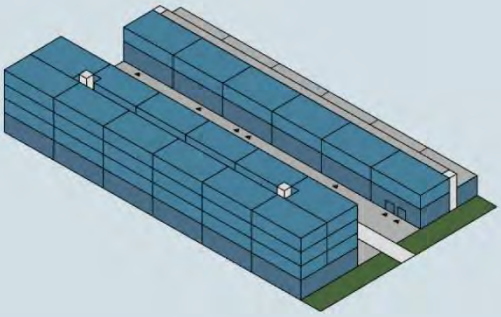
General design criteria

Typical uses	Manufacturing Wholesale Post (micro) Specialised Construction
Potential locations	Lower Sydenham Oakfield Road Cray Avenue / Crayfields Industrial Estate
Plot size	0.2-0.8ha
Environmental considerations	Can provide a transition between heavier industrial uses and more sensitive use. Frequent doors, windows and offices fronting streets can contribute to active streets suitable for more visible areas.
Storeys	2-5 storeys
Typical units	XS (0-50sqm) and S (50-200sqm) 15-30m deep (spans of less than 15m provide good levels of internal daylight)
Ceiling heights	Min 4-6m (6-8m for mezzanine levels)
Servicing requirements	Min 16m deep central shared yard that can accommodate regular LGV and recommended shared loading bay for occasional HGV loading
Colocation	Yes. Best suited to uses that can be clustered and share servicing bays.

Typology A: Small-scale light industrial



Typology A.1
Low-intensity light industrial



Typology A.2
High-intensity light industrial

Best-practice industrial precedents

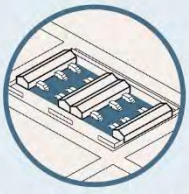
Brentwood Industrial Estate, Vancouver Canada (2002)

A modern trading estate catering to small-medium sized businesses with units ranging between 250sqm and 1200sqm. The 2-storey industrial units all have good indoor qualities with large windows and entrances directly from the street. Each unit has ground floor access while a shared servicing yard and small consolidated parking area provide efficient use of the plot.

Gewerbehof Laim, Munich Germany

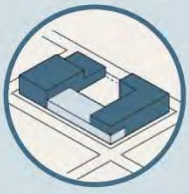
A 5-storey stacked light industrial scheme that provides small units ranging between 85sqm and 320sqm. A rear shared servicing yard connects to interal loading lobbies with 4no. goods lifts servicing upper level. Upper level units are accessed from a shared corridor that can accommodate forklift movement. All units are shallow plan with good daylight and natural ventilation.

Place-based design considerations



Share operational yards

Active frontages



Co-locating uses

Uses as buffers

Typology B: Medium Yard-Based Industry

Typology B accommodates industrial uses that depend on a larger area of the site being given over to yard-space. Often this can be to accommodate heavier industrial activities, material storage or outdoor workspace. As these industrial uses tend to have lower plot coverage and generate more 'nuisance', they may be pushed out of industrial areas in favour of higher-value developments, despite contributing an essential component to a well-functioning industrial economy.

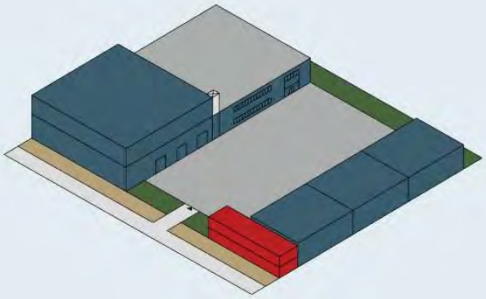
Two typologies for yard-based industry have been proposed, illustrated opposite, that correspond to varying degrees of intensification as well as yard-based requirements. Typology B.1 provides 1-2 storeys of medium industrial units around a central yard with ancillary offices fronting onto primary routes. A significant portion of the plot is given over to yard-space in acknowledgement that this is often central to the industrial processes of these uses.

Typology B.2 provides a higher plot coverage with a yard-space that primary acts for servicing or limited 'lighter' functions such as storage.

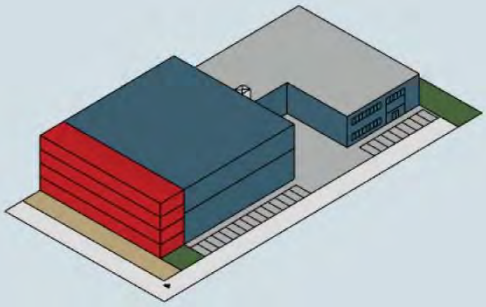
General design criteria

Typical uses	Specialised construction Manufacturing Wholesale
Potential locations	Lower Sydenham Cray Avenue
Typical plot	0.3-1.0ha
Environmental considerations	May not be suitable next to sensitive uses (ie. residential) and consideration should be given to creating positive edges with green buffers, ancillary offices, etc. Potential to make industry 'visible' by providing large-glazed areas to the public realm.
Storeys	2-3 storeys
Typical units	M (200-500sqm) and L (500-2000sqm) Typical units eg: 20x40, 40x40
Ceiling heights	Min 4-8m (6-12m for mezzanine levels)
Servicing requirements	Min 27m deep for HGV and consideration should be given to separating industrial traffic from cyclist, pedestrians and vehicular traffic.
Colocation	Potentially, but use dependent. Often requires a secure perimeter and stand-alone yard space making it difficult to co-locate with other businesses.

Typology B: Medium-scale, yard-based industry



Typology B.1
Medium yard-dependent industry



Typology B.2
Intensified medium industry (small yard)

Best-practice industrial precedents

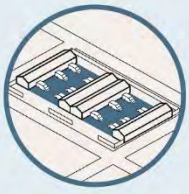
Brasserie de la Senne, Brussels Belgium (2020)

A modern brewery, distribution and office space sharing a central service yard and workspace. A bar and shop alongside ample glazing into the industrial activities provide animation and activity along a primary route.

Medium wholesale, Cray Avenue Bromley

Medium-scale, co-located wholesale with offices in the Cray Industrial SIL. A 1-2 storeys building with a shared central loading bay for LGVs and occasional HGV access. Office and frequent windows overlook the street. Despite an opportunity to potentially consoliate parking further, some limited green buffers have been provided.

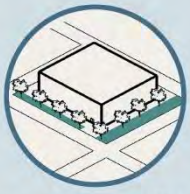
Place-based design considerations



Share operational yards

Active frontages

Reduce impact of parking on public realm



Include green buffers

Typology C: Large-Scale Light Industrial

Typology C provides a single-large format industrial use that can be potentially co-located, to a limited extent, with other industrial uses. Typically, a 'large, blank shed' that requires a large yard and frequent servicing, it is challenging to integrate successfully into urban environments. However, with distribution and logistics facilities increasingly in demand across London, a trend that is likely to continue, and most new high-quality, large-scale industrial developments fall into this category.

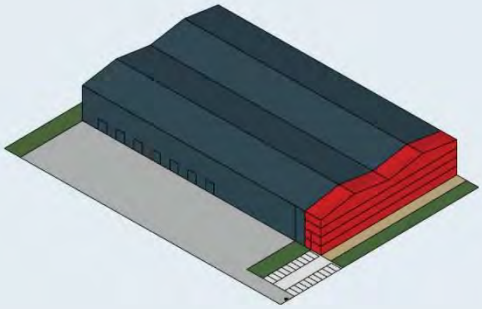
Two typologies for large-scale light industry have been proposed, illustrated opposite, that are similar in nature. Typology C.1. is a typical stand-alone large-scale industrial typology. Offices provide and element of active frontages along the main route and parking has been consolidated.

Typology C.2 is similar, but co-locates a horizontal stacked run of small-medium industrial units along a secondary frontage. This provides activation to what would generally be a blank-frontage as well as increases the potential for industrial floorspace and industrial uses.

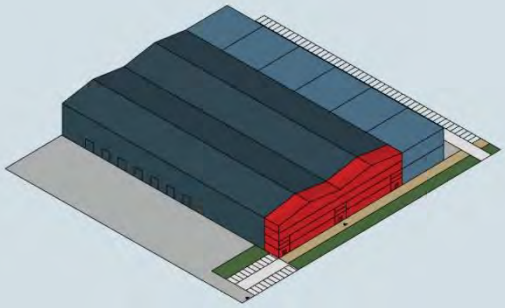
General design criteria

Typical uses	Distribution Storage Wholesale
Potential locations	Cray Avenue Biggin Hill
Typical plot	1.5-2.5+ha
Environmental considerations	Frequent HGV movements are associated with large-scale industrial units and consideration should be given to separating vehicle movements and servicing yards. While office and ancillary spaces can provide active frontages along primary routes, co-location can also be a strategy in avoiding large, blank frontages that are associated with 'big sheds'.
Storeys	1-3 storeys (likely internal mezzanines)
Typical units	L (500-2000sqm) and XL (2000+sqm) Typically large clear spans of 20-30m+
Ceiling heights	Min 10-13m (16m for multiple internal levels)
Servicing requirements	Min 27m deep to accommodate frequent HGV movements. Should be located with good access to the regional highway network.
Colocation	Limited, though some co-location with other light industrial uses may be possible. Typically a stand-alone servicing yard is required.

Typology C: Large-scale distribution and warehousing



Typology C.1
Stand-alone large-scale industry
(E.g. distribution)



Typology C.2
Co-located large-scale industry

Best-practice industrial precedents

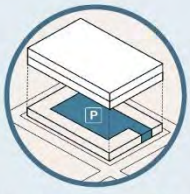
Amazon Warehouse, Cray Avenue Bromley

A modern trading estate catering to small-medium sized businesses with units ranging between 250sqm and 1200sqm. The 2-storey industrial units all have good indoor qualities with large windows and entrances directly from the street. Each unit has ground floor access while a shared servicing yard and small consolidated parking area provide efficient use of the plot.

KAAP Noord, Amsterdam

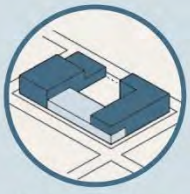
The redevelopment of quayside plot to provide a mix of larger light industrial spaces alonside smaller units with creative studios and workspace that share a central servicing yard.

Place-based design considerations



Consolidate parking

Active frontages



Co-locating uses

Separate HGVs from other vehicles

Office and workspace: criterion for adaptive reuse and retrofit

6.20 Though there is unlikely to be a requirement for a net gain in office floorspace, despite what the demand projections illustrate, there is a need to ensure that any space that does exist or comes forward in the future meets the requirements of occupiers across the projected growth sectors as set out in the table below.

Table 49 Bromley's Office Sector Opportunities

Office growth sector	Typical existing spatial typology	Location drivers	Example occupiers
Professional services	Managed workspace HQ buildings High-street	Bromley Centre	Bank of America (Bromley Town Centre); Thackray Williams Solicitors (Bromley Town Centre)
Business administration and support services	Office park Managed workspace	E Bromley NW Bromley Bromley Centre	Zoom Recruitment (Bromley Town Centre); Education VIPs (Bromley Town Centre); Hanson Regan Resourcing (Bromley Town Centre)
Computing and information services	Co-working spaces Managed workspace Accelerator space / incubator hub	Bromley Centre	Splash Damage (Bromley Town Centre); Sk Cloud Technologies & Consulting (Bromley Town Centre); No Nonsense Tech (Bromley Town Centre)
Real estate	High street Managed workspace HQ buildings	E Bromley NW Bromley Bromley Centre Biggin Hill	So Mortgages (Anerley); E Property Management (Bromley Town Centre); Acorn (Bromley Town Centre); Expose (Anerley);

6.21 Given current office configurations and formats, it may, however, be challenging for some existing office buildings to meet the evolving demands within these sectors. These commercial market trends have been set out in greater detail in Chapter 3 and the ways in which these trends impact the spatial qualities of buildings and workspaces have been summarised below:

- **'Task-based' working:** the shift towards hybrid and flexible working has led to offices needing to support more varied, simultaneous activities often ill-suited to the traditional open-plan office (online and hybrid meetings, workshops, concentrated work, and increased collaborative work).
- **Health and wellbeing:** the national prioritisation of wellbeing has had spatial impacts on workspace with increased importance placed on environmental conditions such as daylight and air quality but also active travel, and amenities like on-site gyms and healthy food options.
- **Worker experience:** enticing workers back to the office has created demand for improved 'office experience' including high-quality design, attractive locations, on-site amenities or activities.
- **Flexibility:** the need to accommodate changing business needs including numbers of employees on a daily or weekly basis and flexibility to rent additional spaces for collaborative work or events.
- **Sustainability:** the prioritisation of energy efficiency with reporting becoming standard for many businesses places demands on spaces to meet the highest-sustainability standards.
- **Ancillary offer:** offices that include outdoor spaces, event / exhibition spaces, cafes, gyms.
- **Technology:** increased pressures for the integration of virtual and physical workspaces, high-quality M+E systems and building systems (including real-time monitoring), and security systems.

Criterion for adaptive re-use and retrofit in Bromley Town Centre

6.22 Bromley Town Centre is an attractive, well-connected location for office space and already has many of the existing qualities of a desirable employment centre. The borough as a whole has a reputation as an attractive place to live and work and is well-placed to capitalise on the emerging trends of employers creating 'satellite' offices closer to where employees live.

6.23 Unfortunately, not all office stock within the Town Centre has kept pace with the current trends and shifting occupier demands set out above. As a result, there are currently high levels of vacancies, particularly around Elmfield Road but also along the High Street. There will also likely be increased pressures for demolition of existing office stock or office-to-residential conversions of vacant or older buildings given unrelenting demand and need for residential uses.

6.24 While conversion or re-development may sometimes be necessary to ensure the long-term economic, social and environmental sustainability of places, there is a significant amount of embodied carbon within existing buildings and, across London, there is a move towards a more considered approach to demolition.

6.25 Consideration should therefore first be given to whether existing buildings can be brought up to the standards of modern commercial occupiers. Although a retrofit solution is generally always a possibility, certain buildings lend themselves more readily to upgrades while other have inherent design qualities that present greater challenges.

6.26 While a thorough audit will be required to determine the suitability of individual buildings, the table below sets out a number of design and sustainability criteria that impact the level of intervention required in a potential retrofit solution of existing buildings.

6.27 These criteria could be used by planning officers in assisting with the assessment of applications coming forward for the redevelopment or demolition of existing office space. They provide a high-level checklist of primary considerations in terms of structure, building form, materials, and layout. Many other factors including architectural merit, existing building condition and viability will also impact the decision to retrofit but this matrix can provide a rubric for an initial, desk-based assessment to determine whether a building is likely to require a major, medium or light-touch level of intervention to align it with modern occupier standards. Any review should take a holistic approach that balances the embodied carbon associated with retrofit solutions compared with the operational energy savings that can be delivered by new construction compared to retrofit options.

6.28 This criterion is tested in Chapter 7: Place-Propositions for the assessment of two buildings within Bromley Town Centre (Hanover Place and Bank of America) to make a high-level commentary on their suitability for re-use. For each criterion, the buildings have been evaluated in terms of the ease and level of intervention likely to be required to bring the building inline with current standards:

- Good: buildings that lend themselves more readily to retro-fit or will require lighter-touch levels of intervention.
- Medium: the existing building configuration presents some challenges that could require higher levels of intervention or result in a less-desirable retrofit solution.
- Poor: the existing building would require a significant level of intervention to bring it inline with modern standards or presents embedded challenges that cannot be resolved through upgrades such as very low floor to ceiling heights.

6.29 It should be noted, however, that at present retrofit is not being led by the market in most places as costs are high compared to value sets that can be achieved. In their *Survival of the Fitted* (2022) report RX London set out that retrofitting buildings to CAT A+ standard currently requires planning, patience and an appetite for risk. This is because it is expensive to do (from £51 psf), is influenced by inflationary pressures and, crucially, is hard to value as there are few examples of high-quality retrofitted properties being sold and/or let in different markets. The market is still relatively immature but it is expected to evolve over the borough's revised Local Plan period.

Table 50: Criterion for adaptive re-use and retrofit

Criteria	Considerations for retrofit
Floorplate dimensions	Shallow floorplates (less than 18m deep) will more easily meet BREEAM targets for natural daylight, can more readily be adapted into a 'task-based working' and better meet the demand for smaller offices. Larger floorplates (deeper than 18) present greater challenges and a more intensive retrofit approach may be required such as a 'cut-and-carve' solution or introduction of atrium to meet BREEAM guidelines and provide smaller floor areas suited better to 'task-based' activities. Deep plan retro-fit is likely also to require more carbon intensive solutions to meet current standards.
Floor heights	Higher floor-to-ceiling heights provide greater flexibility in upgrading MEP. Existing floor-to-ceiling heights above 3.5m (and ideally 4m) can better accommodate the increase in modern MEP requirements. For example, a 700mm (services and raised floor) zone is recommended for a CAT A fit-out with less space potentially required for lower-level fit outs.
Building geometry	Buildings with simple, rectangular geometry that have an existing form factor of 2.0 or less are most readily adapted to meet net-zero targets using passive methods and easier to retrofit externally if required.
Structural integrity	Structural systems with good integrity are a decisive factor in determining reuse potential. Though a detailed structural survey is required to determine structural integrity, often older, steel-framed buildings require more and costlier interventions than concrete frames.
Embodied carbon	Buildings with concrete frames and cladding systems will have very high embodied carbon in comparison to light-weight structures which may be more easily 'donated' for reuse. High-levels of embodied carbon should be a key consideration in the decision to retro-fit or replace.
External glazing	Double-glazed windows of good quality may only require limited upgrades like resealing. Single-glazed windows will likely require full replacement or secondary glazing solutions.
Other building fabric and material considerations	Older buildings may not have (sufficient) insulation and consideration should be given to how adaptable the external building fabric is. Building fabric that can be replaced externally will be easier to upgrade than buildings that must be upgraded internally. The quality of existing external cladding and construction methods will also determine whether it can be retained and the ease to which it can be removed, reused, and replaced. Buildings with high-levels of toxic materials (i.e. asbestos) will also require more costly solutions.
Vertical circulation	Low numbers of lifts (dependent on uses and occupancy levels) may require a more costly and challenging re-coreing approach to incorporate additional lifts.
Possibility for extension	Buildings with the potential for either vertical or horizontal extension from both a townscape and structural perspective will be more commercially attractive to occupiers.
Exiting basement	Intensive renovations will likely put significant pressures on existing MEP spaces including roof spaces. Buildings with existing basements may be better able to accommodate new MEP requirements such as space-hungry commercial sprinkler tanks.
External spaces	Buildings with existing external spaces such as podium spaces, terraces or accessible roof spaces can be more attractive to potential tenants looking to provide a high-quality working environment.
Connectivity	Locations with higher PTAL levels and that including high-quality cycle and walking routes will help attract occupiers prioritising active travel, health and well-being.
Amenities	Locations with varied and proximate amenities including cafes, bars, leisure uses and high-quality public spaces.

Successful light-touch and comprehensive retrofits

C-Space, LB Islington, architect Buckley Gray Yeoman (2016 retrofit): an attractive, light-touch refurbishment of a 1960s office block which involved improving glazing, completely upgrading MEP and electricals, and creating vertically and horizontally extensions while retaining the primary structure and building fabric elements.

Maple House, LB Camden, architect Richard Seifert (1976) and Gibson Thornley (2023 retrofit): the proposed comprehensive refurbishment (left) of a 1970s, granite-clad building to transform the building into CAT A office space around a new landscaped courtyard.

7. Place Propositions: Investigating the Potential of Employment Sites

Chapter Summary

This chapter sets out place based propositions for the six employment sites that present the greatest opportunities for intensification and/or economic diversification as identified through the on the ground site appraisals (i.e. Lower Sydenham, Oakfield Road, Biggin Hill, Crayfields Business Park, Cray Avenue and Bromley South).

These place propositions set out an overall ambition for each location as well as identifying the potential floorspace uplift that intensification could deliver using the typologies set out in the preceding chapter. While the primary purpose of this exercise is to identify the potential increase in supply that could be delivered on existing sites, these propositions have also been developed to guide the activities of LBB s regeneration and economic development teams in these areas.

The key message arising from this analysis is that these six sites have significant potential to evolve and develop to deliver greater economic outcomes for the borough. In terms of intensification, there is capacity to deliver between **additional 94,130 to 169,480 sqm** of floorspace in total. Broken down by use class this translates to:

- Between 38,860 to 120,820 sqm of General Industrial (B2/EG(iii)).
- Between 55,270 to 48,660 sqm Warehousing (B8)[46].

The methodology to calculate these figures is set out in Appendix III.

Lower Sydenham

Site Description	Lower Sydenham is an LSIS located adjacent to Lower Sydenham Station and close to the Bell Green Retail Park. It is bordered by residential areas and is fairly accessible via road, bus and rail. It is a well-established industrial area that serves as a hub for many long-standing industrial-type occupiers and activities. The Sydenham Sports Club, Lewisham Indoor Bowls Centre and former Bridge Leisure Centre are also located within or on the edge of the site underlining its importance as a leisure destination. The Lewisham Waterlink Way begins at the site providing cycling connectivity to Beckenham, Penge, Catford, Lewisham and Deptford. Cycle Quietways also connect into the route providing options for cyclists living in other locations in South London.
Existing Occupier Groups	The site is dominated by traditional industrial occupiers undertaking a spectrum of 'messier' activities ranging from steel fabrication to water treatment. These are complemented by a range of other trade counter type

[46] While it does not seem intuitive, these two figures are purposely written in this order with 55,270 sqm representing the 'lower intensity' option and 48,660 sqm representing the 'higher intensity' option for Warehousing (B8). This is because under the 'high intensity' option several of the plots identified for Warehousing uses (B8) for the 'low intensity' option have shifted to General Industrial (B2/EG(iii)) typologies instead as these represent the most appropriate higher intensity uses for the plot. This also explains why there is such a dramatic increase in the General Industrial (B2/EG(iii) figures from the 'lower intensity' and 'higher intensity' options. These figures have been taken through the supply-demand balance in this order to be consistent with the capacity study.

outlets which service South London's businesses and residents. Dominant occupier groups include:

- Construction (e.g. Penlow & Co, Rise Contracts, Wandsworth Sash Windows, Made Up Ltd).
- Manufacturing/Fabrication (e.g. London Double Glazed Units, London Engineering, Stanmore).
- Creative (e.g. Passion Bakery, Sarah Barron Productions, Made Up, Cover it Up Ltd).
- Trade Counters (e.g. Screwfix, IS&G Steel Stockholders, Cameo Event Hire, Geology Ltd).
- Servicing (e.g. Abbey MOT Station, Floor Sander Hire, Anglian Building Products, Newbridge).
- Recycling (e.g. Latham Skips).
- Professional (e.g. Millington Associates, Integra, Ablitts Solicitors).
- Transport (e.g. Clarks and Stage Coach).

Site Strengths and Opportunities

Lower Sydenham's main strength is that it has a genuine and diverse cluster of complementary production-based occupiers. These occupiers undertake a broad range of production activities including for concrete, lighting, windows, metal, kitchens, bread, cakes and music among others. This is a clear differentiation versus other industrial estates which are often dominated by retail and wholesale type activities.

The site is attractive to these types of occupiers because it is relatively easy-to-access via road and has a good train service providing connectivity to Catford, Ladywell, Lewisham and Central London to the north and Beckenham, Penge, Elmers End, West Wickham and Hayes to the south. This, alongside the recent introduction of the Waterlink Way, means occupiers can draw on a relatively large labour pool when looking to recruit.

The two main physical opportunities on the site are to (a) re-develop and intensify older industrial assets, and (b) to intensify and better utilise 'clear' sites currently used for vehicle or material storage. The latter opportunity has come into focus recently following the announcement from Clarkes Coaches that they intend to close their depot which sits in the centre of the site.

Other strengths include the proximity of green and leisure assets to the site. The recent closure of the London Borough of Lewisham's Bridge Leisure Centre has negatively impacted this, but workers are still able to access the Pool River and Waterlink Way.

Site Weaknesses and Threats

Lower Sydenham's weaknesses primarily relate to its physical layout and condition. While enhancements to Kangley Bridge Road have made a positive impact, parts of the site still suffer from a poor-quality environment. This is most notable on Cricket Lane which resembles an unmade road, and along pedestrian routes through the site which are narrow, tricky to navigate and feel unsafe. Parts of the site also have low-quality buildings coming towards the end of their economic life.

Linked to this the area lacks a clear identity. The layout and permeability of the site makes it feel like several disconnected areas which lack coherence or contiguity. The opportunity to celebrate and visualise the area's production-based activity has not been taken and much activity is hidden behind large fences, gates and doors. There is also a lack of amenities to bring occupiers

	and workers together in the same area further emphasising the disjointed feel of the area – this includes green spaces which are either fairly poor quality (i.e. River Pool) or not open to the public (i.e. Sydenham Sports Club). The site's accessibility to the Strategic Road Network is also a limitation. While it is sufficient for small-scale production activity currently seen on-site today, it is insufficient for larger-scale logistics type activities and those requiring regular large vehicle movements.
Site Proposition	The place proposition for Lower Sydenham is to celebrate its production-based assets by encouraging likeminded businesses and supply chain activity to locate in the area. While being respectful of other activities taking-place on-site, there is an opportunity to brand the area to reflect these uses (e.g. the Sydenham Production Park) and to encourage future development that supports this activity moving forward. Part of this will involve investigating the potential to secure Creative Enterprise Zone status for the area, prioritising the messier 'making' end of the creative sector, and bringing forward 'affordable' workspace to support this.
Priority Sectors	• Manufacturing. • Fabrication. • 'Messy' Creative. • Engineering. • Event Management. • Wholesale. • Motor Trades.
Priority Typologies	• Typology A1: Low Intensity Light Industrial. • Typology A2: High Intensity Light Industrial. • Typology B1: Medium Yard Dependent Industry. • Typology B2: Intensified Medium Yard Dependent Industry.
Suggested Physical Moves	1. Potential to cluster higher-density employment uses near the station and contribute to emerging creative industries in the area with a purpose-built space. 2. Provide positive frontages and improved cycling infrastructure along existing Waterlink Way. 3. Consolidate multiple servicing routes to improve efficiencies and potentially reduce access points from Kent House Road to reduce impact on residential neighbourhood. 4. Introduce new amenities such as café, ideally close to the station to capture multiple audiences and uses. 5. Improve public realm around the station with potential for increased amenities. 6. Seek to improve flood resilience by providing increased permeability along boundary of river.
Suggested Non-Physical Moves	1. Engage with the landowners of the Clarkes Coaches site and explore the feasibility of delivering an affordable workspace facility that supports production activity. 2. Develop a place brand and visual identity for the Sydenham Production Park that is used throughout the site. 3. Create an inward investment platform and business directly to (a) encourage businesses to locate in the area, (b) encourage local businesses to use the services of occupiers on site.

4. Secure Creative Enterprise Zone Status for the area to support inward investment efforts, and give occupiers access to the support programmes this unlocks.
5. Explore options to incentivise production-based businesses to cluster in the area (e.g. business rates relief or capital grants/loans).
6. Discuss opportunity to upgrade from LSIS to SIL with GLA (see Appendix IV).

Precedents

- **Black Horse Collective Creative Enterprise Zone**, London Borough of Waltham Forest (see here): Black Horse Lane's Creative Enterprise Zone which focuses on providing affordable employment space to support the area's artists, makers and creative businesses to remain and proposer in the area.
- **Norwood Works Place Branding**, London Borough of Lambeth (see here): A professionally designed place brand for West Norwood's Key Industrial Business Area (KIBA) that aims to unite businesses and employees in the area under a single locally-representative banner.
- **Made by Tottenham Business Directory**, London Borough of Haringey (see here): A detailed directory of local creative businesses in Tottenham allowing residents and businesses across London to discover creative talent and skills available in the area.
- **Bloqs**, London Borough of Enfield (see here): A professional makerspace that provides access to the tools, equipment and expertise that makers from across the spectrum need to undertake their activities (e.g. product designers, carpenters, set builders, engineers, sculptors, tailors etc).
- **High House Production Park**, Thurrock Council (see here): A 14-acre cultural industries business zone which provides spaces for large-scale creative production activity from set design to film shooting.

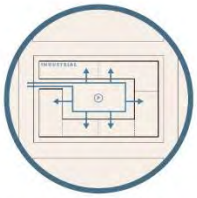
Lower Sydenham Place Based Proposition

Diagram of place-based opportunities

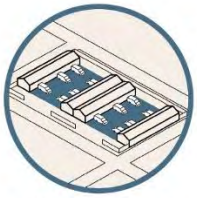
- Residential context
- Existing cycle route
- Existing allotments
- Existing sport pitch
- Enhance active travel / public realm on key cycle route
- Existing service route
- Proposed servicing route
- Positive industrial frontage
- Indicative built footprint
- Indicative servicing yard
- Potential creative hub
- Proposed green / tree buffer
- River Cray
- Potential open space next to the station

1. Potential to cluster higher-density employment uses near the station and contribute to emerging creative industries in the area with a purpose built space
2. Provide positive frontages and improved cycling infrastructure along existing Waterway Link
3. Consolidate multiple servicing routes to improve efficiencies and potentially reduce access points (in the longer term) from Kent House Road to reduce impact on residential neighbourhood
4. Improve public realm around the station with potential for increased amenities clustered
5. Seek to improve flood resilience by providing increased permeability along boundary of the river

6 Built form to create a buffer to 'dirtier' industry along Kent House Road



3 Consolidate multiple servicing routes through the site



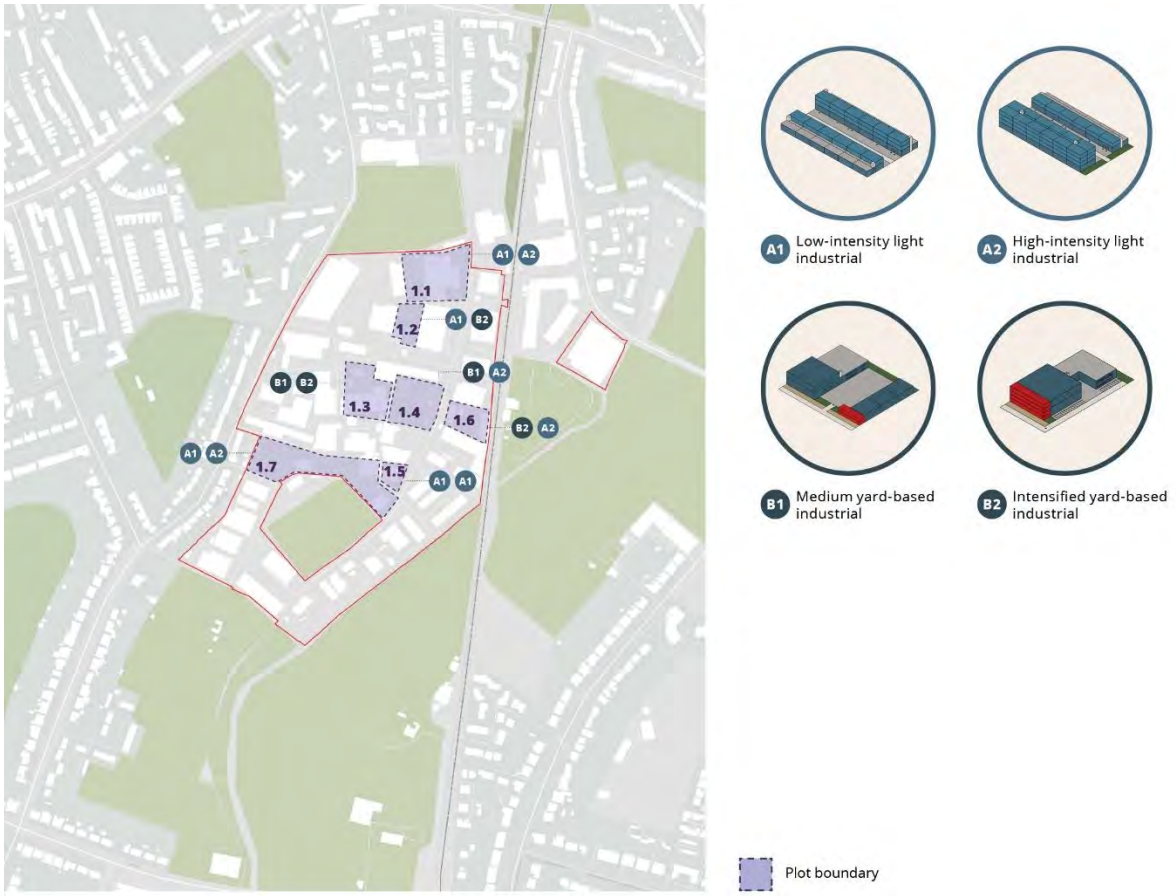
7 Where possible, uses should share servicing yards

Dynamic workshops with a strong identity. Project: Work-Stack, LB Greenwich, architect DRMM for the Greenwich Enterprise Board

Poor quality frontages along residential Kent House Road

Lower Sydenham Capacity Testing

The table and diagram below set out opportunity plots and relevant typologies that have been selected to calculate the theoretical uplift potential across the Lower Sydenham LSIS using the methodology in Appendix III. These show that the area can make a significant contribution to industrial floorspace in the borough with a theoretical uplift of between **27,700 and 44,645 sqm** in total. This is roughly inline with the uplift potential identified for Oakfield Road, despite being a larger employment area with significantly more opportunity plots. This is largely a result of Lower Sydenham containing a multitude of smaller plots instead of a larger more regular site. It is also suitable for yard-based typologies, a key existing component of the LSIS, which have lower potential for stacking and intensification.



Potential redevelopment potential of opportunity plots

	Low-level intensification			High-level intensification		
Site	Typology	Plot ratio (%)	Potential (m^2)	Typology	Plot ratio (%)	Potential (m^2)
1.1	A1	105%	6069	A2	175%	10115
1.2	A1	105%	2142	B2	125%	2550
1.3	B1	80%	3808	B2	125%	5950
1.4	B1	80%	3536	A2	175%	7735
1.5	A1	105%	2678	A1	105%	2678
1.6	B2	125%	638	A2	175%	893
1.7	A1	105%	8836	A2	175%	14726
Total			**27706**			**44646**

Oakfield Road

Site Description	Oakfield Road is an LSIS to the north of Penge and Anerley that has high occupancy levels. It is located close to Penge West, Penge East and Anerley stations which provide connectivity to Croydon, Bromley, Orpington, East London and Central London. The site benefits from its proximity to a local parade which offers a range of shops and services, as well as Crystal Palace Park which is one of south's London largest and most attractive green spaces. Oakfield Road is dominated by industrial-type uses in units that were primarily built around the 1960s. These units are clearly demarcated into three different areas which are punctuated by residential uses breaking up the flow of the area. It is home to a diverse mix of occupiers ranging from a manufacturer focused on aerospace activities (Ametek) to self-storage (i.e. Self Store and Bonny's) and trade counter occupiers (e.g. Wickes, Homebase, Jewsons).
Existing Occupier Groups	The site is 'generic' with no clear identity or clustering of similar activities. The main characteristic of occupiers is that, bar Ametek, they service local residents and businesses. The importance of these types of industrial activities should not be underestimated in supporting the day-to-day lives of people in the area. Dominant occupier groups include: • Trade Counters (e.g. Homebase, Wickes, Jewsons, Howdens). • Wholesalers (e.g. Edwardes Bros). • Car Repair (e.g. Ancaster). • Manufacturing (e.g. Ametek Aerospace, WC Evans Steel Fabricators). • Printing (e.g. Odessa Print). • Storage (e.g. Safestore Self Storage; Bonny's Storage). • Event Management (e.g. Europa Event Furniture).
Site Strengths and Opportunities	Oakfield Road's main advantage is its location which makes it suitable and attractive for a range of uses including industrial, residential, retail and services. Unlike many other employment sites, it is well connected via public transport and sits alongside a local parade which boasts a range of amenities including a deli, café, bar, pub, convenience store, hairdresser, drycleaner, gym, beauty salon, masseuse, baker, and various takeaways. It is in walking distance of Crystal Palace Park and Penge High Street. Penge and Anerley also have a diverse, engaged, and ever-changing population. This population has become increasingly creative over time, and the area has developed an identity as a place for artists, makers and other creatives to live – in large part due to having 'affordable' residential property alongside a high-profile street art programme running in the area. The Franklin Industrial Estate in Penge has also evolved as a cluster of creative activity, and Anerley Works is due to open in the coming months to provide high-quality artists' studios. Other assets include the Tension Fine Art Gallery, Matico Dance Studio and London School of Rhythm. A key opportunity is that the Eastern End of the site has relatively simple ownership making re-development more straightforward than in other locations. Re-development could lead to an uplift in active floorspace as the site is relatively inefficiently used and low density compared to other industrial estates in constrained urban environments.

Site Weaknesses and Threats	As well as being its main advantage, location is also Oakfield Road's biggest limitation. This is because it is nestled deep within an urban neighbourhood surrounded by houses, flats, shops, amenities, and a local primary school. It is also some distance from the Strategic Road Network which is only accessible via South East London's residential streets and high streets. This means the site is less suitable for 'traditional' industrial uses that create noise, pollution, and high levels of large vehicle movements. The site is also not efficiently laid out and is punctuated by residential uses which, in some cases, are accessed via the roads into the industrial zones. Some road layouts, particularly along Meaford Way, are also inactive and poorly managed encouraging flytipping and anti-social behavior. This configuration leads to conflicts between the different uses in the area which could be managed through better design.
Site Proposition	The place proposition for Oakfield Road is to encourage the comprehensive re-development of the eastern end of the site as existing buildings come towards the end of their economic life. Given the area's locational advantages, there is an opportunity to create a new mixed-use community of complementary residential and light industrial uses that allow the site to better integrate with the surrounding area and creates a new connection into Penge West station. The light industrial uses should cater to businesses that serve the local population, while also capitalising on the growth of the creative industries in the area through the provision of 'affordable' space.
Priority Sectors	• 'Light' Manufacturing. • Creative. • Trade Counters. • Wholesale. • Storage.
Priority Typologies	• Typology A1: Low Intensity Light Industrial. • Typology A2: High Intensity Light Industrial. • Co-location of above with residential.
Suggested Physical Moves	1. Opportunity for new mixed-use development in close proximity to the station with active frontages along the High Street. 2. Potential for small pocket park/urban greening and improved station connectivity. 3. Build to back-of-pavement along Oakfield Road and provide ground floor active industrial uses such as offices, workshops and amenity space. 4. Improve public realm and active travel link between Anerley Station and High Street. 5. Potential long-term opportunity to re-develop key corner plot opposite the station.
Suggested Non-Physical Moves	1. Work co-operatively with landowner(s) to develop further guidance for development activity in the area. 2. Curate a local business forum to shape plans in the area, and ensure future accommodation meets their needs. 3. Explore the feasibility of introducing alternative residential products that complement light industrial uses to the area in collaboration with major

landowner(s) (e.g. tethered housing with 'affordable' workspace provision).

4. If alternative residential products are to be promoted develop clear policy guidance that requires applicants to provide robust plans and processes that ensure any workspace is used appropriately.
5. Identify funding mechanisms to address any viability gaps in providing complementary residential and light industrial uses (e.g. GLA's Small Sites Programme).
6. Create a place brand and visual identity for the area (e.g. 'Penge Works') that is used throughout the site.
7. Explore opportunity and potential for a Creative Enterprise Zone covering this area and Anerley/Penge more widely.

Precedents

- **Bernard Works, Tottenham** (see here): An architecturally designed and privately-proposed tethered live-work scheme that includes plans for four houses, two live-work duplexes and three apartments set around an attractive courtyard adjacent to a large industrial site.
- **Deptford Foundry, Deptford** (see here): A large development of over 300 homes in a former industrial area on Arklow Road in Deptford that has a large creative artist studio at ground floor which offers 85 purpose-built studios and workspace.
- **Caxton Works, Canning Town** (see here): A series of 13 light industrial commercial units in Canning Town that are at the ground floor and mezzanine levels of a large residential development within a new mixed-use town centre in East London.

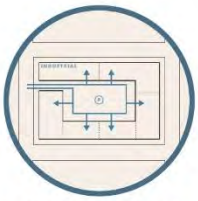
Oakfield Road Place Proposition

Diagram of place-based opportunities

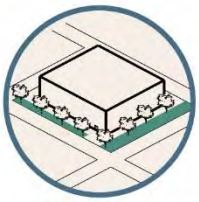
- Residential context
- Bus route
- Existing cycle route
- Enhance active travel and public realm on key route
- Existing servicing route
- Proposed servicing route
- Positive industrial frontage
- Active mixed-use frontage
- Indicative built footprint
- Indicative servicing yard
- Potential built footprint (outside of site boundary)
- Potential creative hub
- Proposed urban greening
- Potential open space
- Enhance ecological corridor

1. Potential for a mixed-use development to co-located residential and high-street uses capitalising on the proximity to the station and amenities and providing active frontages along the High Street
2. Potential for small pocket-park/urban greening and improved station connectivity
3. Build to back-of-pavement along Oakfield road and provide ground floor active industrial uses such as offices, workshops and amenity spaces
4. Improve public realm and active travel link between Anerley Station and the High Street
5. Potential long-term opportunity to re-develop key corner plot opposite the station

3 Active frontages along Oakfield Road aligned with back-of pavement



6 Consolidate servicing route to improve plot efficiencies



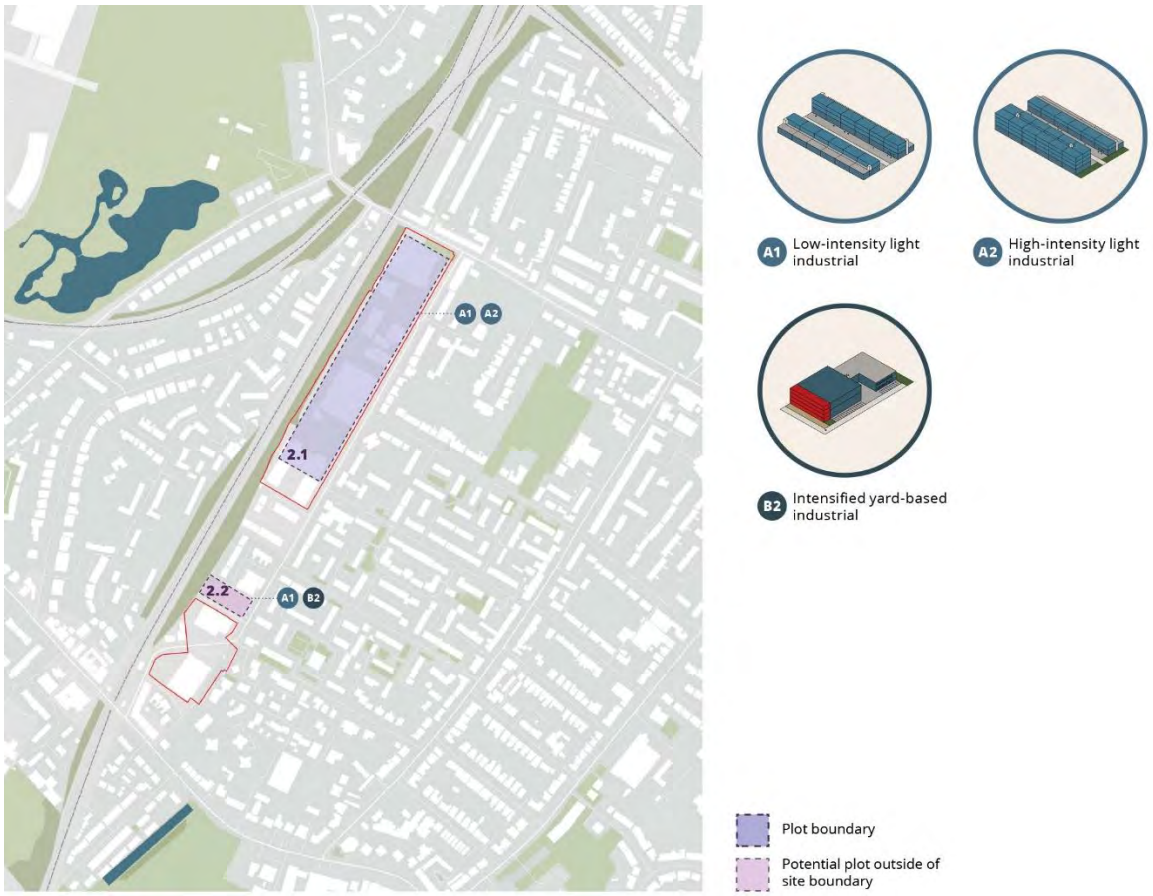
7 Enhance the ecological corridor along the rail-line

Ground floor mixed light-industrial with residential above. Project: Caxton Works, LB Newham, architect Studio Egret West

Stacked light-industrial workshops provide a positive frontage. Project: Gewerbehof Laim, Munich Germany, architect Bogevischs buero

Oakfield Road Capacity Testing

The table and diagram below set out opportunity plots and appropriate typologies that have been selected to calculate the theoretical uplift potential across the Oakfield Road LSIS using the methodology in Appendix III. Despite its small size, the area can make a considerable contribution to additional industrial floorspace in the borough with a theoretical uplift of between **28,070 and 45,680 sqm.** This is a result of the area being identified as a potential location for a higher-density, stacked light-industrial use that could contribute to it becoming a creative 'light manufacturing hub' for the borough. It is worth noting that the plot adjacent the High Street, currently a Homebase, would be an attractive location for a mixed-use development (i.e. residential and light industrial type uses or tethered living)[47]. However, for the purposes calculating theoretical industrial floorspace uplift it has been assumed that the LSIS will remain predominantly industrial with supporting ancillary uses only.



Potential redevelopment potential of opportunity plots

	Low-level intensification			High-level intensification		
Site	Typology	Plot ratio (%)	Potential (m^2)	Typology	Plot ratio (%)	Potential (m^2)
2.1	A1	105%	25,751	A2	175%	42,919
2.2	A1	105%	2321	B2	125%	2763
Total			**28,072**			**45,681**

[47] As discussed, this is because it remains a 'suitable' employment site *and* because it is an ideal location for residential uses - it sits adjacent to Penge West Station, a local parade and bus stops, and is a three-minute walk to Crystal Palace Park and the Bridge House pub and theatre.

Biggin Hill

Site Description	Biggin Hill Industrial Estate is an LSIS that sits adjacent to Biggin Hill Airport, a dedicated business aviation airport. This proximity makes it an attractive location for occupiers involved in aviation and related industries. The site benefits from reasonable links to major road networks, with the M25 relatively accessible allowing for convenient transportation of goods and workers.
Existing Occupier Groups	Given the presence of Biggin Hill Airport, as well as the headquarters of Formula One, the site is dominated by occupiers undertaking engineering type activities. Tenants range from high-end vehicle repair centres to manufacturers of components. Dominant occupier groups include: • Engineering (e.g. Triple E, Limspfield Combustion Engineering, BK Labtech, Stage and Tiers, Jackson Lewis Controls). • Motor Trades (e.g. Supercar Italia, Motorwerx Ltd, Car Body Repairs, Fix Auto Biggin Hill). • Media and Communications (e.g. Formula One Management). • Trade Counters (e.g. Screwfix, Omega Valves, Bike Parts, Howdens). • Warehouse (e.g., Mood Media Fulfilment Centre and ELT.aero). • Office (e.g. Designers Contracts Thames Medway and South London).
Site Strengths and Opportunities	Biggin Hill Industrial Estate's main advantage is its proximity to Biggin Hill Airport and other major anchors including Formula One, Bombardier and Jetex. This has encouraged engineering businesses to cluster on the site which either directly serve these assets or, more commonly, benefit from being close to them from a marketing and 'image' perspective. The relatively good access to the M25 is also an advantage as it means occupiers can access a skilled workforce from across a relatively large area. The main opportunity is that the owners of Biggin Hill Airport have put forward expansion plans to support the growth of aviation activity on site. If this comes forward it could generate new supply chain opportunities for businesses, in turn creating demand for commercial space in the area. While some of this space is proposed on the airport itself, there is a clear opportunity to expand the footprint of the industrial estate onto vacant area of land to the south of the site.
Site Weaknesses and Threats	The main weakness of the site is its poor accessibility via public transport. The nearest train station with regular connections into London and out to Kent is Orpington, which is around half an hour away by bus. This makes it difficult for occupiers to recruit staff – particularly younger or lower-paid staff that do not have access to a private vehicle. The amenity and 'place' offer on the industrial state is also relatively basic. While there is a café and hotel, when compared to business facilities around airports like Farnborough, Brighton and Gatwick the offer is fairly unattractive. These other airports have larger and more extensive business parks that present a threat to Biggin Hill in terms of attracting future tenants.
Site Proposition	The place proposition for the Biggin Hill Industrial Estate is to create a stronger and more prominent engineering cluster, leveraging any opportunities that might emerge if proposals for Biggin Hill Airport come forward. This should be

	a shared endeavor with the airport to realise the full economic potential of the area. The cornerstones will be enhanced branding, improved public realm and the provision of sensitive and sustainable new light industrial space across the Industrial Estate, and potentially airport, that caters to and encourages the clustering of higher-value engineering businesses that support and benefit from being close to the airport. This includes small and start-up engineering businesses through the provision of 'affordable' workspace.
Priority Sectors	• Engineering. • Transport. • Manufacturing. • Motor Trade. • Scientific and Technical. • Trade Counters.
Priority Typologies	• Typology A1: Low Intensity Light Industrial. • Typology A2: High Intensity Light Industrial. • Typology B1: Medium Yard-Dependent Industry. • Typology B2: Intensified Medium Yard-Dependent Industry.
Suggested Physical Moves	1. Enhance woodland areas within the site and create green buffers to residential areas. 2. Bring forward small opportunity plot to incorporate part of existing parking/trading estate area. 3. Consolidate parking areas across the site to free up potential additional development areas.
Suggested Non-Physical Moves	1. Continue to engage positively with Biggin Hill Airport to bring forward sensitive and sustainable growth that supports both residents and businesses. 2. Create a shared place brand and visual identity for the area (e.g. Biggin Hill Engineering Park) that is used throughout both the Industrial Estate and airport as an inward investment tool. 3. Develop proactive Local Plan policies that balance the need to protect the local environment with the imperative to encourage economic growth in and around Biggin Hill Airport. 4. Work with existing landowner(s) to explore the potential of further development and intensification within the LSIS. 5. Engage with existing tenants to understand demand and need for additional commercial space within the area. 6. Explore the feasibility of bringing forward an Advanced Manufacturing Incubator to attract a broad range of small, innovative and high value businesses to locate and/or start up in the area (similar to Hethel Engineering Centre or iAero).

Precedents

- **iAero, Cornwall** (see here): An incubator and innovation hub for small and medium sized enterprises (SMEs) in the aerospace sector, which also facilitates links between tenants and larger businesses, academia and funding organisations. The centre offers workshops, private offices, conference rooms, co-working spaces, kitchens, storage spaces and parking to attract businesses and encourage collaboration. It is located next to the Yeovil/Westland Airport.
- **Hethel Engineering Centre, Norwich** (see here): An advanced engineering incubator centre adjacent to the Lotus Headquarters than provides office, light industrial and studio space for some of the most innovative advanced manufacturing and engineering business in Norfolk. Occupiers also have access to a suite of support programmes to help them set up, establish, scale and grow.
- **Cody Technology Park, Farnborough** (see here): A full service business park adjacent to Farnborough Airport that provides office, laboratory, light industrial and R&D space for advanced technology and engineering businesses such as QinetiQ, GE Oil & Gas, Intertek, Airbus, UK Cloud and Ultra Electronics.

Biggin Hill Place Based Proposition

Diagram of place-based opportunities

- Residential context
- Existing walking trail
- Museum
- Airport
- Surface car parking
- Bus route
- Formula 1 offices
- Existing servicing route
- Proposed servicing route
- Indicative built footprint
- Potential to intensify sites opposite trading estate
- Proposed urban greening
- Retain / enhance tree corridor
- Enhance existing woodlands

1. Enhance woodland areas within the site and create green buffers to residential areas
2. Small opportunity plot with potential to incorporate parking / trading estate area to the north
3. Consolidate parking areas within the wider site to free up potential additional development areas

Biggin Hill Capacity Testing

The table and diagram below set out the opportunity plot and relevant typologies that have been selected to calculate the theoretical uplift potential across Biggin Hill using the methodology in Appendix III. Due to the limited availability of opportunity plots, the area can only make a small theoretical contribution to industrial floorspace in the borough of between **3570 and 5950 sqm** – this presents a good size opportunity for an innovation centre focussed on growing the wider engineering cluster in the estate/airport and wider region. However, there are also a number of smaller, surface car parking areas within the site and wider area that could be consolidated in the future into stacked car storage solution to free up potential additional developable areas.

Potential redevelopment potential of opportunity plots

	Low-level intensification			High-level intensification		
Site	Typology	Plot ratio (%)	Potential (m^2)	Typology	Plot ratio (%)	Potential (m^2)
5.1	A1	105%	3570	A2	175%	5950

Crayfields Business Park

Site Description	This site contains Crayfields Business Park *and* Crayfields Industrial Park. It is a modern campus style development just off Sevenoaks Way providing office space in the Business Park and light industrial space in the Industrial Park. Both parts of the site are within the Crayfields Business Corridor SIL and are separated by greenfield land.
Existing Occupier Groups	The Business Park has a mix of occupiers from a health clinic to a research foundation, whereas the Industrial Park has traditional light industrial occupiers that undertake activities primarily related to wholesale and construction. Dominant occupier groups include: • Construction (e.g. Orpington Roofing, Underwoods Electrical Distributors Stearn, Electrical Co). • Trade Counters (e.g. Abbey Met Supplies, Morelands Electrical, BEW Electrical Distributors). • Medical (e.g. Healthcare Clinic Orpington Endoscopy, Kensington Physio and Sports Medicine). • Research and Development (e.g. Accellacare South London Quality Research).
Site Strengths and Opportunities	The site's main advantage, particularly for industrial occupiers, is its proximity to the A20 which provides rapid connectivity to the M25, M20, A21 and beyond. The A20 is under three minutes away from the site by road, with Junction 3 of the M25 accessible in under ten minutes. Given there is rising market demand for industrial uses and falling demand for office uses, particularly in peripheral locations away from amenities and public transport connectivity, this presents an opportunity to re-orient and re-develop the existing office uses to provide industrial type uses as and when occupancy becomes an acute challenge. Local industrial businesses are clearly attracted to the site already as indicated by relatively high occupancy rates in the Industrial Park, and there may also be an opportunity to cater to logistics businesses given the site's proximity to the Strategic Road Network. There is also an opportunity to re-think the layout and extent of the site. Expanding the boundary to include the Homebase to the west would create a bigger area. If this is done alongside using a portion of greenbelt land, it could unlock a more cohesive industrial estate while also encouraging a comprehensive re-development scheme.
Site Weaknesses and Threats	The main weakness of the site is that its location away from amenities and public transport connections make it less than optimum for office-based uses. Following the COVID-19 pandemic office occupier expectations have shifted, and it is the highest-quality office spaces that in most demand. Those that are close to amenities and in attractive locations are also most desirable to encourage workers to use their offices in a hybrid fashion rather than working exclusively from home.
Site Proposition	The place proposition for the Crayfields Business and Industrial Park is to encourage the comprehensive re-development of the site over time to create a new, cohesive and contiguous industrial park that provides a mix of small,

	medium and big box units catering to a range of industrial occupiers. Given the area's sensitive location it should be a best-in-class environmentally sustainable, sensitive and appropriate development that significantly enhances and improves local biodiversity.
Priority Sectors	• Logistics. • 'Light' Manufacturing. • Wholesale. • Construction. • Engineering. • Motor Trade. • Storage. • Trade Counters.
Priority Typologies	• Typology A1: Low Intensity Light Industrial. • Typology A2: High Intensity Light Industrial. • Typology C1: Standalone Large Scale Industrial. • Typology C2: Co-Located Large Scale Industrial.
Suggested Physical Moves	1. Consolidate multiple parking and servicing areas within the site on identified plots. 2. Established and enhance ecological corridors through the site with trees, planting and SUDs. 3. Potential to concentrate employment along Main Road and enhance adjacent green areas. 4. Create a strong identity for the wider employment area linking to the natural surroundings. 5. Expand SIL boundary to include Homebase and better connect areas to create a unified employment area.
Suggested Non-Physical Moves	1. To support release of green belt land and change of use, work co-operatively with the landowner(s) to undertake a carbon negative masterplanning exercise in line with the *Industrial Land and Uses LPG* (see Chapter 2) to smooth the path to delivery. 2. Engage with the landowner(s) and Wildlife Trust to introduce a 'Living Landscape' to the re-development scheme, and ensure biodiversity is maximised through plans for the area. 3. Create a place brand and visual identity centred around being London's greenest and most biodiverse industrial estate. 4. Remove Office Cluster designation and re-designate as SIL only land. 5. Create an inward investment and incentive initiative to encourage industrial businesses engaging in the green economy to locate in the area. 6. Provide targeted business consultancy support for green economy businesses locating in the area.

Precedents

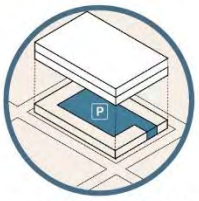
- **Wrexham Industrial Estate, Wrexham** (see here): A large 550 acre manufacturing-based industrial estate where the North Wales Wildlife Trust have created a 'Living Landscape' to help protect, improve and create new habitats for wildlife as well as enhance biodiversity.
- **Segro Park, Tottenham** (see here): A highly sustainable BREEAM 'Outstanding' industrial park that has been designed to be carbon negative and EPC A+. A range of biodiversity initiatives have also been introduced including the introduction of green walls, trees and plants which have been carefully selected to reduce pollutants and maximise wellbeing for workers.
- **Perch Eco Business Centre, Bicester** (see here): A first-of-its kind Passivhaus Plus workspace that offers space for entrepreneurs and small businesses focused on creating and contributing to a more sustainable and responsible future.

Crayfields Business Park Place Based Proposition

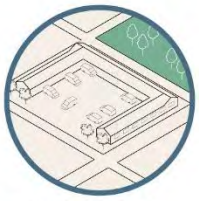
Diagram of place-based opportunities

- Residential context
- Existing cycle route
- School
- Retained bowls club
- Potential to expand site
- Potential walking route
- Existing vehicular route
- Proposed servicing route
- Establish green link
- Indicative built footprint
- Indicative servicing yard
- Potential built footprint (outside of site boundary)
- Proposed urban greening
- Existing planting / trees
- Proposed renaturalised river + green open public space
- Existing open space
- River Cray

1. Consolidate multiple parking and servicing areas within the site on plots
2. Establish and enhance ecological corridors through the site with trees, planting and SUDs
3. Potential to concentrate employment along Main Road and enhance adjacent green areas
4. Provide a built buffer to natural infrastructure to screen service yard areas
5. Create a strong identity for the wider employment area linking to the unique natural surroundings
6. Potential to expand to connect site areas (including Homebase) to create a unified employment area



1 Consolidate surface car parking areas to release sites for development



4 Provide a buffer to natural infrastructure

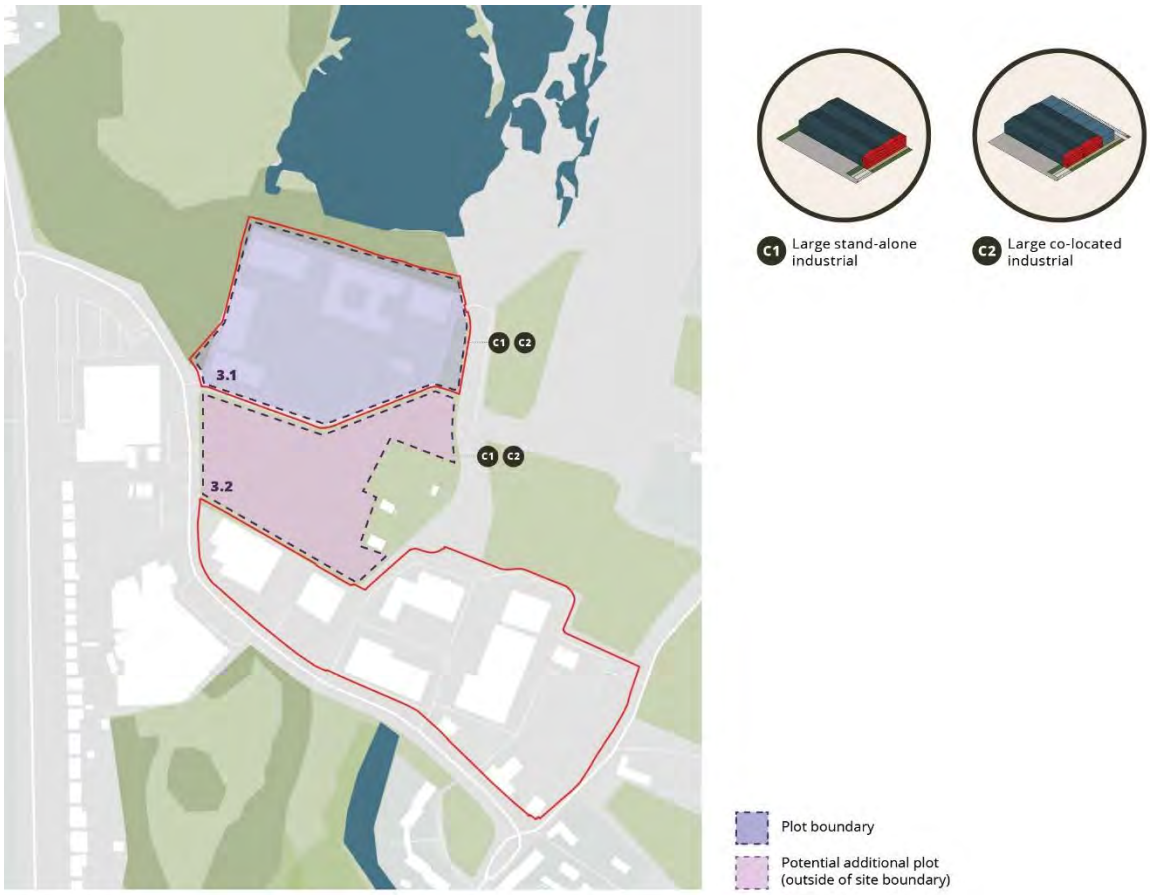
Creating public access to the water and flood resilient landscapes Project: Cornmill Gardens, LB Lewisham, BDP.

A strong identity linked to nature. Project: Chiswick Business Park, LB Hounslow, Rogers Stirk Harbour + Partners.

Crayfields Business Park Capacity Testing

The table and diagram below set out opportunity plots and appropriate typologies that have been selected to calculate the theoretical uplift potential across Crayfields Industrial and Business Park using the methodology in Appendix III. Including the central area, which currently sits outside the site boundary, the area can deliver a total net theoretical uplift in industrial floorspace of between **26,410 and 29,050 sqm.** These figures include replacing the existing office space to the north of the site (9,996 sqm in total with 7,911 sqm occupied).

The relatively high contribution in relation to the scale of employment cluster is a result of the area being identified as suitable for larger industrial uses such as distribution and warehousing typologies. There may also be potential for the upper range to be increased with multi-level, stacked distribution. A stacked distribution typology has not been considered at this stage as these are more likely to come forward in central locations, however they may be appropriate in the future if pressures on industrial land continues to increase in line with current trends.



Potential redevelopment potential of opportunity plots

	Low-level intensification			High-level intensification		
Site	Typology	Plot ratio (%)	Potential (m^2)	Typology	Plot ratio (%)	Potential (m^2)
3.1	C1	100%	16125	C2	110%	17738
3.2	C1	100%	10285	C2	110%	11314
Total			**26410**			**29051**

Cray Avenue

Site Description	The Cray Avenue is a combination of four large employment sites to the south of Sevenoaks Way that encompass retail, industrial and some office uses. They form the 'heart' of the Crayfields Business Corridor SIL and are strategically located close to St Mary Cray Station and within ten minutes' drive of the A20 which provides links to the M25, M20, A21 and beyond.
Existing Occupier Groups	While the area initially appears to be dominated by retail and trade counter uses, there are more traditional industrial activities taking place within industrial estate behind the street-facing units. Traditional activities range from fabrication and manufacturing to storage and transportation. Dominant occupier groups include: • Warehouse and Storage (e.g. Central House, Access Self Storage Orpington, Amazon UK Services). • Manufacturing/Fabrication (e.g. Treval Engineering, Allied Bakeries, Ace Cutters, Prima Tapes, Darwent Wax). • Transport (Wright Bus Orpington, Top Hat Logistics, Peter Van, A to Z Logisitics). • Retail (e.g. Sports Direct, TK Maxx, Carpet Giant). • Trade Counters (e.g. Halfords, Home Bargains, Howdens, Alltype Roofing, Benchmarx Kitchens and Joinery, Grabex Windows, Selco Builders Warehouse). • Office (e.g. Philip Nolan Accountants, IT Support UK, Caremark Bromley, Orpington Removals) • Leisure (e.g. Muscleworks Gym, Airjump Trampoline Park).
Site Strengths and Opportunities	The site's main advantage is that it is an ideal location for industrial type activities. This is because: • St Mary's Cray station is on the edge of the site and offers good rail connectivity into London and Kent. • It is within a five-minute drive of the A20 and under 15 minutes from Junction 3 of the M25. • It sits on the border of London and Kent allowing businesses to access customers and suppliers across a large area. • It is close to other major industrial areas which supports the local supply chain (e.g. Foots Cray). • It is close to and accessible from several large towns and neighbourhoods which creates a large and dynamic labour pool. These factors mean that there is high demand for industrial and light industrial units in the area, as highlighted by the rapid take up of new units provided as part of the recent Halo development. The amenity offer at the Nugent Retail Park and the green/blue space at Riverside Gardens is also highly attractive to occupiers and workers. This has given rise to strong industrial leasing values which are higher than office values in the area. The main opportunity in the area is to celebrate and build on the more hidden higher-value industrial activities taking places in the area, notably in manufacturing, fabrication, and production. These sectors provide 'good' jobs and can help to drive economic growth and diversification.

There are also opportunities to increase the industrial footprint in the area. For instance, the site has:

- Several 'Big Box' retail units that are either vacant or at risk of becoming vacant.
- Low density plots used for storage and/or car parking that could be more efficiently and strategically used.
- Ageing, lower-density, single-storey buildings coming towards the end of their economic life.

Site Weaknesses and Threats

The main weakness of the site is that it has a large density of retail and service uses versus more productive industrial and light industrial uses that align with the area's history and SIL status. While these serve an important local function, it appears that over time this dominance has diluted the area's density of industrial activity and weakened its identity as an industrial cluster. Fragmented development of sites has also contributed to a disjointed and incoherent feel.

Another weakness is that it appears to lack active management in places creating conflicts around issues like parking, flytipping, congestion, branding and security among others. While some individual parcels are well-managed, others are not creating a disparate environment. Other competitor industrial estates which have fewer landowners are typically better managed, and have a coherent wraparound brand used for marketing and tenant curation.

Site Proposition

The place proposition for the Cray Avenue is to re-discover the area's historic roots by encouraging 'proper' industrial businesses to occupy sites and buildings that come forward over time, as well as supporting the clustering of higher-value industrial activities such as manufacturing and its supply chain (e.g. storage, logistics, transport etc). This will involve creating a clear identity for the area that reveals and celebrates the 'hidden' industrial activity taking place across the area alongside the area's locational advantages (e.g. its amenity offer, green/blue space and public transport connectivity).

Priority Sectors

- Manufacturing.
- Logistics.
- Storage.
- Transport.
- Wholesale.
- Construction.
- Engineering.

Priority Typologies

- Typology A1: Low Intensity Light Industrial.
- Typology A2: High Intensity Light Industrial.
- Typology B1: Medium Yard Dependent Industry.
- Typology B2: Intensified Medium Industry.
- Typology C1: Standalone Large Scale Industrial.
- Typology C2: Co-Located Large Scale Industrial.

Suggested Physical Moves

1. Link discontinuous runs of street trees along Cray Avenue to create continuous canopy.
2. Consolidate servicing areas and access routes on larger opportunity plots.
3. Improve southern gateway to Cray Industrial area.
4. Encourage linkages to green corridor and active travel network.

5. Work with landowners to test the potential for delivering sensitive and sustainable intensified mixed-use employment in areas with retail.

Suggested Non-Physical Moves

1. Explore the feasibility of setting up an Industrial Business Forum to shape and steer future interventions and prioritise other management investments, with the potential for this to evolve into an Industrial Business Improvement District once trust and confidence between businesses has been established.
2. Given the opportunities for intensification and the area's SIL status, work co-operatively with landowners to develop an area-wide masterplan in line with the *Industrial Land and Uses LPG* (see Chapter 2).
3. Engage with landowners and the GLA to explore delivery and funding options for intensification of opportunity sites.
4. Create a place brand, visual identity and inward investment platform that can be used to reestablish the area's industrial roots.
5. Consider options to incentivise production-based businesses to move to the area (e.g. business rates relief, capital loans/grants, business support etc).

Precedents

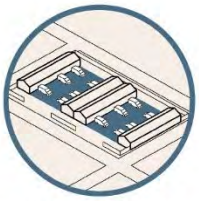
- **Manor Royal Business District, Crawley** (see here): A large mixed-use business park adjacent to Gatwick Airport that is managed, operated, promoted and advocated for by the Manor Royal Business Improvement District (BID). As well as these activities, the BID oversees a wide range of 'improvement' projects from the introduction of art and greening to the delivery of a new innovation centre.
- **Industria Industrial Intensification, Barking Riverside** (see here): A joint project by the GLA and BeFirst to bring forward one of London's largest and highest-quality multi-storey industrial units. It provides 45 units in a range of sizes, with flexible lease terms to allow businesses to adapt and grow over time. Unlike most other industrial developments it has a ground floor café, coworking space, communal area, landscaping and green walls.

Cray Avenue Place Based Proposition

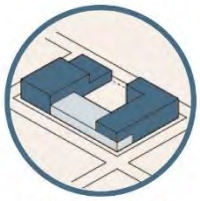
Diagram of place-based opportunities

- Residential
- Bike Route
- Retail park
- Walking trail
- Existing allotments
- Existing pedestrian link
- Enhance connectivity
- Existing service route
- Proposed servicing route
- Activate Industrial Frontage
- Indicative built footprint
- Indicative servicing yard
- Potential built footprint (outside of site boundary)
- Potential employment hub
- Proposed tree corridor
- Existing mature trees
- Potential green / open amenity space
- Improve gateway to the wider employment area
- River Cray

1. Link discontinuous runs of street trees along Cray Avenue to create continuous canopy
2. Consolidate servicing areas and access routes on larger opportunity plots
3. Improve southern gateway to the Cray Industrial area
4. Encourage linkages to green corridor and active travel network
5. Possible future opportunity to create an intensified mixed-use employment hub on retail park



2 Where possible, uses should share servicing yards



6 Potential to colocate higher density employ-ment uses near station

7 Separate industrial and residential traffic by servicing from Cray Ave

Providing a positive frontages for distribution uses. Project: Industria, LB Barking and Dagenham, Haworth Thompkins.

Cray Avenue Capacity Testing

The table and diagram below set out opportunity plots and relevant typologies that have been selected to calculate the theoretical uplift potential across the Cray Avenue SIL area using the methodology in Appendix III. The largest and most significant employment cluster in the borough, it can make the largest theoretical contribution to industrial floorspace in the borough of between **74,140 and 109,920 sqm.** It is the only employment area that has been identified as being suitable for all industrial typologies as well as having a range of plot sizes and conditions that can accommodate small light industry to large-scale distribution uses. Though outside of the site boundary, the Nugent Shopping Park also has the potential to come forward as a higher-density mixed-use centre that could contribute to an emerging employment hub within walking distance of St. Mary Cray station.

Potential redevelopment potential of opportunity plots

	Low-level intensification			High-level intensification		
Site	Typology	Plot ratio (%)	Potential (m^2)	Typology	Plot ratio (%)	Potential (m^2)
4.1	C1	100%	16150	C2	110%	17765
4.2	C2	110%	18563	A2	175%	29531
4.3	C1	100%	16235	A2	175%	28411
4.4	A1	105%	5891	B2	125%	7013
4.5	C1	100%	11475	A2	175%	20081
4.6	B1	100%	3060	B2	125%	3825
4.7	A1	105%	2767	B2	125%	3294
Total			**74140**			**109920**

Bromley South

Site Description	Bromley South is a Business Improvement Area (BIA) and the main office location in the borough. A variety of businesses and amenities are located within the area, attracted by its town centre location and proximity to Bromley South Station. The area is characterised by office headquarters, flexible offices and a small number of shops, cafes and restaurants. A major challenge is office to residential conversion via Permitted Development Rights.
Existing Occupier Groups	Most office occupiers in the area tend to be in the financial, professional and/or insurance sectors as reflected by the area's main anchors – Bank of America, Acorn and Foresters Financial. The area is also home to public services such as the Metropolitan Police, Bromley Youth Service and the London Borough of Bromley. Dominant occupier groups include: • Financial/Insurance (e.g. Bank of America, Foresters Financial, Palantir Financial Planning). • Professional (e.g. Newton Media, Acorn, Montpelier Solicitors, VFA Legal Limited). • Public Services (e.g. Bromley Police Station, Bromley Youth Justice Service, Job Centre, London Borough of Bromley). • Hotel (e.g. Ibis Budget London Bromley Centre). • Leisure (e.g. Bromley Fitness Centre).
Site Strengths and Opportunities	The site's main advantage is that it is the most attractive location in the borough for modern office occupiers. This is because it has excellent public transport into London, Kent and surrounding neighbourhoods via rail and bus. The A21 also runs directly through the site which links up with the A20, M20 and M25. The site is also in a town location which is an attractor due to the amenities this offers. Office occupiers are increasingly looking to locate in these locations to encourage employees to work in officers rather from home. The importance of 'lifestyle' and 'wellbeing' factors is at the forefront of occupiers' minds when choosing where to locate.
Site Weaknesses and Threats	The main disadvantage of the area, however, is that it does not offer the type of office stock that occupiers are increasingly demanding leading to vacancy challenges. While there is some flexible workspace, there is little high-quality floorspace across the area. The only recent high-quality office development is Perigon Heights, which is fully occupied illustrating the opportunity better quality space presents. This vacancy challenge has led to a large number of office-to-residential conversions. This has impacted the function of the area already, and there are several consented schemes in the development pipeline that will continue to impact the area's identity as an office cluster. The quality of the surrounding environment is also fairly poor across the area, particularly along Elmfield Road. This part of this site has a poor-quality

streetscape, a lack of greening and is unanimated impacting its attractiveness to occupiers.

A risk that may exacerbate the area's position further is that some anchor tenants are likely to consolidate their office portfolios following the rise in hybrid working. While some may be interested in remaining in the area, there is little good quality stock available so they may decide to leave the area. If this happens there is a further risk that vacated space will be converted to residential uses.

Site Proposition

The proposition for Bromley South is to improve the quality of place to help make the area even more attractive for modern office occupiers. This will involve dramatically improving the physical environment and enhancing connections with the station while also encouraging the diversification of uses where it makes the area more attractive for businesses.

Recognising that demand for office uses has weakened, this may include the provision of some residential, service and leisure uses but this should be complemented by high-quality office space that existing and future occupiers can utilise. Learning from the example of Perigon Heights, the area will become a mixed-use area where businesses and residents co-exist and complement one another.

As part of this, retrofit will be promoted wherever practical and viable in line with the criteria identified earlier in this report. The area will become an exemplar for good quality retrofit demonstrating the opportunity for other boroughs and town centres in South East London.

Crucially the area will be promoted and supported to become the borough's main office area – with recent proposals for Wells House anchoring this. Occupiers that are displaced from other offices across the borough could be supported to locate here given its significant locational advantages and strategic importance to the borough's economy.

Priority Sectors

- Professional Services.
- Business Administration.
- Finance and Insurance.
- 'Clean' Creative.
- Computing and ICT.
- Lifestyle.
- Public Administration.
- Real Estate.

Priority Typologies

- Managed workspace.
- Flexible serviced office.
- Creative/digital studios.
- Residential.
- Leisure.
- Health.

Suggested Physical Moves

1. Create a cohesive character along Elmfield Road that complements the High Street by building on existing urban greening and encouraging a unified public realm strategy.
2. Work proactively with landowners to bring forward development and retrofit projects in the area.

3. Consider restricting vehicular movements along Elmfield Road to create a pedestrian priority zone.
4. Improve the public realm and frontages adjacent to Bromley South Station.
5. Extend the high-quality urban design material palette in Bromley North through to Bromley South.
6. Longer term seek to provide a new green, public open space that complements the urban High Street and hard landscape spaces, and provide an amenity space for an increased residential population.
7. Continue to investigate opportunities to create a new station entrance at the eastern end of the Platforms to directly serve this area.

Suggested Non-Physical Moves

1. Create a new brand and identity for the area as a place where people choose to live, work, and relax.
2. Work closely with major anchors to determine their future office requirements and seek opportunities to retain them within the local area.
3. Ensure any re-development and/or conversion schemes only come forward where a robust business relocation strategy has been developed, with a focus on keeping occupiers in the area.
4. Where office space is lost elsewhere in the borough or town centre, encourage occupiers to locate in this area and seek to make it the borough's premier cluster for office occupiers.

Precedents

- **CB1, Cambridge** (see here): A new mixed-use quarter outside Cambridge Station that has exceptionally high-quality new office space, complemented by retail, leisure and health uses, as well as student accommodation and private homes.
- **Guildford Station Quarter, Guildford** (see here): A forthcoming new gateway around Guildford Station that will provide a mix of uses to enhance the attractiveness of the area and its office blocks to prospective occupiers. The development is to include new homes, offices, retailers and station enhancements.

Bromley South Place Based Proposition

Diagram of place-based opportunities

- Residential context
- Existing cycle route
- Potential new station exit
- Parking area
- Enhance active travel and public realm on key route
- Servicing route
- Improve public realm and frontages
- Active mixed-use frontage
- Create cohesive, pedestrian priority public realm
- Potential opportunity
- Opportunity building to be retained
- Retrofit case study building
- Pedestrian zone
- Future opportunity for public open space

1. Create a cohesive character along Elmfield Road that complements the High Street by building on existing urban greening and encouraging a unified, pedestrian priority public realm strategy
2. Consider restricting vehicular movements along Elmfield Road to create a pedestrian priority zone
3. Improve the public realm and frontages adjacent Bromley South station
4. Extend the urban design material palette including pavers, planters and seating from the High Street in Bromley North through to Bromley South Station to create a more cohesive public realm
5. Longer term seek to provide a green, public open space that compliments the urban High Street and hard landscaped spaces and provides an amenity space for an increased residential population
6. Office space retrofit evaluation case studies: Bank of America and Hannover Place

Potential to enhance greening to build on the existing character of Elmfield Road. Project: Alfred Place, LB Camden, LDA Design.

Extending the material palette of the High Street southwards. Project: Bromley Town Centre, Studio Egret West.

Bromley South Retrofit Assessment

7.1 Two buildings within Bromley Town Centre have been selected to test the retrofit evaluation criterion set out in Chapter 6. These examples serve to illustrate how the evaluation criterion could be applied to two very different typologies. These assessments are based on a high-level visual assessment from a combination of site visits and desk-based research. Some structural and material assumptions have been made based on professional knowledge as no detailed drawings, plans or surveys were made available.

Bank of America, 26 Elmfield Rd BR1 1WA

Overall, the building has good potential for a light-touch retrofit. This is primarily due to its:

- Shallow floorplan
- Regular geometry and opportunities for subdivision of floorplates
- Proximity to the town centre
- Generous windows offering good natural light
- Potential for external amenity spaces

Main challenges will likely be upgrades to MEP systems given the already constrained roofspace and lower floor to ceiling heights. The detailed opportunities and challenges of retrofitting the Bank of America building are set out in the table below.

Criteria	Rating	Considerations for Retrofit
Floorplate dimensions	Good	A shallow floorplate of approximately 14m deep allows for good natural daylighting throughout and possibilities for passive ventilation. The horseshoe plan would also be well suited for subdivision between tenants.
Floor heights	Medium	Existing floor-to-ceiling heights are approximately 2.4m high, making MEP upgrades potentially more challenging as these would likely be restricted to the existing ceiling void.
Building geometry	Medium	The asymmetrical horseshoe plan and stepping makes upgrades of the external envelope slightly more complex than rectangular geometry. However, the floorplate repetition allows for a unified retrofit strategy across floors and there is a high-level of repetition between components.
Structural Integrity	N/A (no info. available)	Though a detail structural survey would be required, given the building age (1980s), the concrete frame would likely be well within its approximate 100 year lifespan if properly maintained.
Embodied Carbon	Good	The building has a high embodied carbon due to the concrete frame construction and the concrete panels of the external cladding, both of which would be more challenging to recycle.
External Glazing	Good	The building has previously undergone refurbishment and appears to have double-glazed windows, a significant investment in terms of cost and resources.
Other building fabric considerations	Medium	The external metal cladding and brick appear in relatively good state. Dependent on the fixing methods, the metal cladding could offer an easier replacement of the external cladding and upgrading of insulation externally.
Vertical circulation	Medium	The location of building lifts and staircases make it possible to subdivide floorplates between tenants. A review of lifts and stairs against currently fire regulations and occupancy numbers should be carried out.
Possibility for extension	Poor	The use of the building plot is already maximised, and horizontal extensions are unlikely. The building's concrete frame may make vertical extension possible.
Existing basement	N/A	No information available.
External spaces	Good	The building is set back from Elmfield Road, providing existing amenity and green spaces. These spaces can be further enhanced to provide higher quality streetscape 'break-out' spaces. The lower roof space of the podium could be used as external amenity while the upper roof levels are largely occupied with MEP.
Connectivity	Good	The building is less than 5 min. walk to Bromley South Station, with direct rail links to Central London.
Amenities	Good	The High Street, with café, shops and other amenities is within a 2-minute walk to the site.

Hanover Place, **44 High Street, BR1 1EA**

Hanover Place represents a less attractive proposition for retrofit. This is primarily due to:

- A deep floorplate unlikely to provide good levels of natural light and ventilation and be unattractive to modern occupiers (despite the atrium)
- Recladding required to improve external appearance
- Poor quality ground floor and entrance
- Lack of external amenity space

Despite its prominent and attractive corner location on the high-street, the key challenge for Hanover Place will be to improve its visual appearance and address the limitations of a deep floorplate combined with lower floor-ceiling heights.

Criteria	Rating	Considerations for Retrofit
Floorplate dimensions	Poor	The 30m x over 40m deep floorplate make achieving good natural daylight and ventilation, despite the atrium. Re-coring or extension of the existing atrium would be a costly and high-level of intervention likely not attractive given the building's small size, location and other upgrade requirements.
Floor heights	Medium	Recently refurbished new suspended ceiling at approx. 2.4m and full access raised floor means that there is likely adequate space available for future upgrades. However, 2.4m is relatively low given the building depths.
Building geometry	Medium	The rectangular geometry provides a good form factor. The current deep plan could be improved by extending the existing small atrium to maximise daylight in the office spaces.
Structural Integrity	N/A (no info. available)	Hanover place was built in 1960 and was renovated in 1993, a detailed structural survey would be required to determine the condition of the concrete frame to know whether it could potentially support a vertical extension.
Embodied Carbon	Medium	Due to its form and age, the building is assumed to have a concrete frame construction. The light-weight upper envelope could be reclad to upgrade the insulation externally or internally.
External Glazing	Medium	Existing double-glazed windows may only require minor upgrades (condition dependent) but are part of an unattractive cladding system that would benefit visually from replacement.
Other building fabric considerations	Good	The ground floor stone plinth could be retained and upgraded. The low canopy could also be an interesting structural feature but is currently unattractive and imposing on the streetscape.
Vertical circulation	Poor	The location of building lifts and staircases make it more challenging to subdivide floorplates between tenants.
Possibility for extension	Medium	Given the deep floorplate, a horizontal extension to the rear is likely an unattractive proposal. There is currently limited MEP on the roof and a vertical extension may be possible, structural assessment dependent.
Existing basement	n/a	No information available.
External spaces	Poor	The building does not feature any external amenity. There could be an opportunity to create a green external space to the rear of the building or consolidate MEP to convert the roof into an accessible terrace.
Connectivity	Good	The building is located on the High Street and in direct proximity to Bromley South Station, with direct rail links to London City.
Amenities	Good	The building's central location offers a wide range of cafés and shops nearby.

8. Recommendations

8.1 This study provides a detailed overview of demand and need for employment floorspace in Bromley, as well as the amount of supply that is (a) currently available, (b) in the pipeline or (c) unlockable on opportunity sites via intensification and/or re-development. To determine whether this supply is sufficient to meet future demand and need this chapter sets out the demand-supply balance. This, alongside other analysis throughout the report, is then used to identify a series of recommendations for future employment provision in the borough.

Demand Supply Balance

Supply Dynamics

8.2 The supply of employment floorspace in Bromley consists of:

a) The amount of employment floorspace that is currently available for lease or sale.
b) The quantum of employment floorspace expected to come forward from extant, unimplemented and/or in-progress planning permissions.
c) The potential increase in employment floorspace that could be unlocked via intensification and/or re-development on the six opportunity sites identified.

8.3 As set out in Chapter 5, there is currently around **45,812** sqm of employment floorspace that is available for lease or sale. By use class there is:

- 32,500 sqm of available office (EG(i)/(ii)) floorspace.
- 9,562 sqm of available general industrial (B2/EG(iii)) floorspace.
- 3,750 sqm of available warehousing (B8) floorspace.

8.4 Extant, unimplemented and/or in-progress planning permissions could increase this by **+20,071** sqm if fully implemented. This is driven by:

- Expected gain of +201 sqm of office (EG(i)/(ii)) floorspace.
- Expected loss of -1,795 sqm of general industrial (B2/EG(iii)) floorspace.
- Expected gain of +21,665 sqm of warehousing (B8) floorspace.

8.5 This means that over the short-to-medium term there may be **c65,883** sqm of employment floorspace supply in total within Bromley from these two sources, including c32,701 sqm of office (EG(i)/(ii)) floorspace, 7,767 sqm of general industrial (B2/EG(iii)) floorspace and 25,415 sqm of warehousing (B8) floorspace.

8.6 As Chapter 7 illustrates there is, however, significant potential to increase the supply of industrial-type space via intensification and/or re-development activity on the six opportunity sites identified. Building on the analysis presented in Chapter 5, and the typologies presented in Chapter 6, it has been calculated that there is potential to increase the amount of supply by around **+94,130 to +169,480** sqm over the long-term. This roughly breaks down to[48]:

- General Industrial (B2/EG(iii)) Floorspace: +38,860 to +120,820 sqm.
- Warehousing (B8) Floorspace: +55,270 to +48,660 sqm[49].

[48] It is difficult to break the total figures down by use class as some typologies have a mix of industrial uses, or can be adapted to provide general industrial or warehousing depending on the size of unit that comes forward, but a use class has been ascribed to the dominant typology to inform the demand-supply balance calculations.

[49] While it does not seem intuitive, these two figures are purposely written in this order with 55,270 sqm representing the 'lower intensity' option and 48,660 sqm representing the 'higher intensity' option for Warehousing (B8). This is because under the 'high intensity' option several of the plots identified for Warehousing uses (B8) for the 'low intensity' option have shifted to General Industrial (B2/EG(iii)) typologies instead as these represent the most appropriate higher intensity uses for the plot. This also explains why there is such a dramatic increase in the General Industrial (B2/EG(iii) figures from the 'lower intensity' and 'higher intensity' options. These figures have been taken through the supply-demand balance in this order to be consistent with the capacity study.

8.7 In total, this means that across the three supply categories (a, b and c) there is potential for c.**160,013-235,363** sqm of employment floorspace supply in Bromley over the long-term as set out in the table below. This breaks down to:

- 32,701 sqm of office (EG(i)/(ii)) floorspace.
- 46,627 to 128,587 sqm of general industrial (B2/EG(iii)) floorspace.
- 80,685 to 74,075 sqm of warehousing (B8) floorspace.

8.8 While these figures have been compiled in line with best practice for studies of this nature, they should be read with some caution. This is because:

- Even though a building may have some floorspace availability it may not be suitable to meet demand due to limitations around quality, format, location, connectivity and other factors that modern occupiers require.
- Even if a site has a planning consent it is not guaranteed that the floorspace changes that are anticipated will come forward as not all schemes given planning permission are built out. This is particularly the case at present given high interest rates and the fluctuating economy.
- Achieving the uplift that is possible via intensification is challenging and based on a number of assumptions, calculations and parameters. Policy and practice will need to align to unlock some of the opportunities this presents.

Table 51 Bromley's Employment Floorspace Supply (SQM)

	Office (EG(i)/(ii))	General Industrial (B2/EG(iii)) Floorspace	Warehousing (B8) floorspace
Employment Floorspace Currently Available	32,500	9,562	3,750
Extant, Unimplemented and/or In-Progress Planning Applications	201	-1,795	21,665
Short-to-Medium Term Supply	**32,701**	**7,767**	**25,415**
Intensification of Existing Employment Areas	N/A	38,860 to 120,820	55,270 to 48,660
Long Term Supply	**32,701**	**46,627 to 128,587**	**80,685 to 74,075**

Source: Co-Star, LBB, Avison Young, Maccreanor Lavington

Demand-Supply Dynamics

8.9 These supply figures are compared with the demand and need figures identified in Chapter 4 in the table below. Demand figures are taken from the synthesis scenario following best practice adjustments – they are based on national rather than London-level employment density guidance as the national assumptions feel more reflective of commercial space and economic activity in the borough.

8.10 The right-hand column of the table shows total employment floorspace demand versus supply. This shows that total demand (**+88,924 to 125,743 sqm**) could be met by a combination of (a) existing available supply, (b) pipeline supply and (c) floorspace unlocked via intensification and/or re-development. Relying on existing and pipeline supply alone over the short-to-medium term would lead to a shortfall in supply as in total they only have the potential to provide **c65,883** sqm of space. This illustrates the importance of intensification and re-development activity to meet future demand and need.

8.11 Considering this by use class, it is clear that future demand for office floorspace (EG(i)(iii)) (**+55,294 to 70,119 sqm**) cannot be met by the three supply sources presented. Even though this is the case it is *not* recommended that LBB plan for a significant amount of additional office floorspace in the borough as demand dynamics for office space are changing as set out in Chapter 2. Just because employment is expected to grow, it does not mean that demand for office floorspace will rise as it has done in the past as the relationship between the two variables has begun to change in recent years due to the rise of hybrid working. Similarly, elevated levels of existing available supply in the borough suggests that demand for office stock in the locations and format currently available has changed.

Table 52 Bromley's Demand Supply Balance All Uses (2022-2040) (SQM)

	Office (EG(i)/(ii))	General Industrial (B2/EG(iii)) Floorspace	Warehousing (B8) floorspace	Total
Gross Floorspace Requirement	**+55,294 to +70,119**	**+17,905 to +33,271**	**+15,724 to +22,352**	**+88,924 to 125,743**
Employment Floorspace Currently Available	32,500	9,562	3,750	45,812
Extant, Unimplemented and/or In-Progress Planning Applications	201	-1,795	21,665	20,071
Intensification of Existing Employment Areas (Modest Intensification)	N/A	38,860	55,270	94,130
Total Demand / Supply Balance (Modest Intensification)	**-22,593 to -37,418**	**+28,722 to +13,356**	**+64,961 to +58,333**	**+71,089 to +34,270**
Intensification of Existing Employment Areas (Maximum Intensification)	**N/A**	**120,820**	**48,660**	**169,480**
Total Demand / Supply Balance (Maximum Intensification)	**-22,593 to -37,418**	**+110,682 to +95,316**	**+58,351 to +51,723**	**+146,439 to +109,620**

Source: Co-Star, LBB, Avison Young, Maccreanor Lavington

8.12 Due to this it is recommended that future office policy focuses on supporting and promoting the right type of office stock in the right locations – this will involve consolidating office uses to the most appropriate locations and supporting the provision of high-quality flexible office space in these places. As identified in Chapters 5 and 7, the most appropriate location is Bromley Town Centre and Bromley South in particular given its locational advantages. As the Bromley South place proposition sets out, it is a 'suitable' employment site but there is a need to enhance the quality of stock and surrounding environment to attract occupiers to remain and/or locate in the area.

8.13 The table above also indicates that future demand for general industrial (B2/EG(iii)) (**+17,905 to 33,271** sqm) will *not* be met by existing and pipeline supply - intensification and/or re-development of existing sites is required. Warehousing (B8) demand (**+15,724 to 22,352** sqm), in contrast, *can* be met by current and pipeline supply – this is, however, highly contingent on the pipeline floorspace coming forward across a single or small number of applications so intensification is likely to be required if relevant schemes are not delivered.

8.14 The demand-supply position for general industrial (B2/EG(iii)), and to an extent warehousing (B8), is therefore contingent on achieving intensification and re-development across opportunity sites, though not all plots need to come forward to meet future demand and need as collectively they have the potential to deliver a surplus of space.

8.15 To achieve intensification and re-development at scale will, however, be challenging and require policy to support and promote intensification on sites that present opportunities. Drawing on Chapters 5, 6 and 7, the table below identifies the relevant sites and includes recommendations about which should be designated in the refreshed Local Plan.

Table 53 Sites Presenting Intensification and/or Re-development Opportunities

Site	Classification	Uplift Potential	Policy Recommendation
Lower Sydenham	Extend and Reorient	27,700 to 44,645 sqm	Retain as designated industrial site and consider opportunities for SIL designation (see Appendix IV)
Oakfield Road	Intensify and/or Co-Locate	28,070 to 45,680 sqm	Retain as designated industrial site allowing flexibility for co-location
Biggin Hill	Remain and Intensify	3,570 to 5,950 sqm	Retain as designated industrial site
Crayfields Business/Industrial Park	Extent and Reorient	26,410 to 29,050 sqm	Consider designation as an industrial site only, incorporating wider red line boundary (i.e. Homebase site), with removal of Office Cluster status
Cray Avenue	Intensify	74,140 to 109,920 sqm	Retain as designated industrial site
Bromley South	Reorient and Co-Locate	N/A	Retain as designated office site allowing flexibility for co-location

Strategic Recommendations

Achieving Industrial Intensification

8.16 The demand-supply position set out above clearly illustrates that some level of industrial intensification will be required to meet future demand for general industrial (B2/EG(iii)) and potentially warehousing (B8) uses in Bromley – though it is important to note that not all the intensification opportunities identified in Chapter 7 need to come forward.

8.17 Achieving intensification at the scale required will require active intervention as policy alone is likely to be insufficient to realise the levels of change needed over the Local Plan period. To encourage intensification on the opportunity sites identified we would recommend:

1. Writing clear planning policies that encourage intensification. A new type of designation could be created such as an 'Industrial Intensification Area', similar to the borough's old 'Business Improvement Area' designation for town centre locations. This would set out a clear policy position and indication of the type of development activity that will be supported by LBB in these areas.
2. Developing site-based masterplans in line with the *Industrial Land and Uses LPG* (see Chapter 2) for the sites that present the biggest opportunities for intensification and floorspace uplift (i.e. Crayfield Industrial/Business Park and Cray Avenue).
3. Creating delivery plans to identify different levers that LBB could employ to encourage and support intensification activity. Building on the non-physical interventions identified in Chapter 7, this should consider a wide range of options from land assembly through to providing low interest loans to developers to help address viability challenges. It should also set out how LBB will *directly* help interested parties to deliver intensification schemes – for example:
    - On publicly owned land this could involve working with the GLA to jointly invest and bring forward schemes like Industria.
    - On privately owned land it could involve jointly investing in schemes with developers to encourage investment and reduce developers' risk in bringing forward these relatively novel typologies.

8.18 Other sites can be considered for the steps outlined above but it is prudent to prioritise the areas with the greatest opportunities given LBB has limited resources.

Looking Beyond Industrial Intensification

8.19 It is recognised that relying on intensification and re-development alone to meet demand will be challenging as it is a complex process that is relatively unproven as a borough-wide strategy to meeting identified demand and need. For example:

- **Novel Typologies:** While industrial intensification schemes have started to come forward across London (e.g. Industria, X2, Bloom Hackney) it is still a relatively novel concept and is a long way from becoming the norm across the city particularly in Outer London. There is some way to go before developers, occupiers and agents consider it a default option and this, in part, links to the challenging viability position.
- **Delivery Phasing:** Unlike traditional ground floor industrial estates, intensified typologies are difficult to deliver in a phased approach. This is challenging as developers generally prefer to release units in a phased way to test market demand and ensure they do not oversupply the market. This impacts the attractiveness of intensified typologies to more traditional developers.
- **Economic Diversity:** A major strength of the borough's economy is it diversity and the fact it accommodates a range of businesses across a spectrum of locations and site types. Without targeted action, intensification could erode this diversity if smaller and more affordable sites are re-developed for larger, more modern and expensive units.
- **Infrastructure Requirements:** Delivering additional industrial capacity will impact infrastructure networks such as power, water and roads. More detailed infrastructure studies may therefore be

required to identify whether any upgrades or improvements to local infrastructure are needed to enable intensification activity.

8.20 Due to these challenges it is recommended that while industrial intensification *should* be pursued as a long-term strategy, particularly as it is more feasible in Bromley than some other locations because only a relatively modest uplift is required, it may be risky to rely on it as the sole mechanism to meet future demand and need. Other mechanisms may therefore need to be considered over the short-to-medium term to meet future demand and need as part of the refreshed Local Plan. Typical options include:

- Allocating suitable opportunity sites not currently in employment use for employment-led development.
- Actively promoting 'big box' retail parks for conversion to 'B-class' employment uses.
- Consolidating 'space heavy' uses (e.g. waste and recycling facilities) to smaller and more efficient sites unlocking them for development.

8.21 The main opportunity for LBB's officers is to consider the role that less sensitive greenbelt sites could offer for the expansion of employment uses. Those that are located close to other employment sites, have good accessibility to the road network and are accessible by public transport could be considered.

8.22 There is also an opportunity to promote the conversion of 'big box' retail across the borough to productive employment uses. There are fewer retail parks in Bromley that present opportunities versus other Outer London boroughs but places such as Waldo Road and Elmers End could be considered.

8.23 While it is not recommended that these mechanisms are employed *instead* of pursuing intensification, it is recognised that collectively the different levers have the potential to more than meet demand and need over the short-, medium- and long-term.

Enabling Office Consolidation

8.24 As with industrial uses the demand-supply position suggests that supply is unlikely to meet future demand for office floorspace (EG(i)(iii)) in Bromley. Even though this is the case, it is *not* recommended that LBB plan for a significant amount of additional office floorspace as demand dynamics for office space are changing due to hybrid working, and there are challenges with office occupancy across the borough. Due to this it is recommended that future policy supports the consolidation of office uses to Bromley Town Centre, and Bromley South in particular, as they are the most appropriate, attractive and 'suitable' office locations in the borough.

8.25 It is therefore recommended that planning policies are introduced to highlight Bromley Town Centre as the borough's preferred office area. The focus, however, should *not* be on increasing the quantum of office floorspace but rather on (a) *improving* the floorspace that already exists, and (b) encouraging office owners in other parts of the borough to relocate occupiers to these locations if they re-purpose and/or re-develop their sites – for example Crayfields Business Park. This will help retain occupiers in the borough and support economic development.

8.26 Where office buildings are being re-purposed or converted to other uses policies could set out a requirement for applicants to produce Business Relocation Strategies. Guidance should be provided on what these should include, with a focus on identifying and supporting occupiers to access the right type of office space in Bromley Town Centre. Ideally LBB will be actively involved in shaping these strategies and will support owners and occupiers by playing a strategic brokerage role with other asset owners and agents.

8.27 Where office buildings are being re-developed for other uses by landowners, policies could be introduced to capture some of the value being created. This could be reinvested into office improvement and refurbishment schemes in Bromley Town Centre, or to support and incentivise occupiers to move to these areas. The ambition should be to use any income to make the preferred locations more attractive and viable for occupiers to base themselves in order to maintain the borough's local economy.

Focus On: Bromley's Affordable Workspace

As identified earlier in this report it will be important to ensure that a portion of employment floorspace that comes forward in the future caters to start up and small businesses. The borough currently has little space of this nature, which may be constraining the local economy as identified in the *Bromley Economic Evidence Base* (2023).

To ensure the borough better provides for these businesses, particularly those requiring workshop, studio and light industrial type space, it would be prudent to undertake a borough wide workspace study in line with other London boroughs such Haringey, Southwark, Brent, Hammersmith & Fulham and Lambeth as well as those under the West London Alliance umbrella (i.e. Barnet, Brent, Ealing, Hammersmith & Fulham, Harrow, Hillingdon and Hounslow).

This study would provide an evidence base covering topics around demand, supply, definitions, requirements, design, typologies etc tailored to the Bromley context and its most important employment locations. Building on the evidence set out in this study, it could be used to inform a specific affordable workspace policy for the revised Local Plan.

This evidence based policy, and any associated supplementary guidance, should cover topics such as:

- The borough s definition of affordable workspace.
- Circumstances when affordable workspace should be provided.
- Mechanisms for delivering affordable workspace on or off site.
- Locations where affordable workspace should be provided.
- Types of affordable workspace to be provided and on what terms.
- Leasing structures considered acceptable for 'affordable workspace.
- Target markets and outcomes expected from affordable workspace.
- Expectations around operations and delivery, including management plans.
- Processes for monitoring and evaluating performance.

Some of the detail for these questions is provided throughout this study but additional analysis will be required to complete it fully. For example:

- Chapter 3 sets out a potential definition for 'affordable workspace.
- Chapter 4 indicates the types of affordable workspace that could be provided.
- Chapter 7 highlights some potential locations for 'affordable workspace provision.
- Chapters 3 and 4 provides some ideas around target markets and outcomes.

9. Appendix I: Economic Impact of Biggin Hill Airport

Context

9.1 This annex sets out an economic impact assessment of Biggin Hill Airport which has been used to inform the need analysis, site assessments, place-based propositions and recommendations presented in this this report. The assessment is both backwards and forwards looking considering both the current economic impact of the airport as well as its potential future impacts.

9.2 Biggin Hill Airport is currently designated as a Strategic Outer London Development Centre (SOLDC) in Bromley's Local Plan (2019) which has a policy objective (Policy 103) to: "…support the Biggin Hill SOLDC, including the provision of associated business infrastructure and amenities, as an important sub-regional hub for aviation and related high-tech industry, achieving sustainable economic growth whilst minimising adverse impacts on the environment and the amenity of surrounding communities". The following sites have specific policies as described below and highlighted in Figure 37:

- Policy 104: Terminal Area (Map Location 1): *"Land in the Biggin Hill SOLDC identified as Terminal Area will be safeguarded for aviation-related employment generating uses*".
- Policy 105: West Camp (Map Location 2): *"The Council will support the development of aviation-related employment generating uses on land in the Biggin Hill SOLDC identified as West Camp. Proposals for Class C1, D1, B1(a) and B1(b) uses in West Camp will be permitted if it can be demonstrated that the proposed uses: a - reinforce the role of the SOLDC, and b - do not impede the effective operation of other aviation related employment generating uses in the SOLDC or reduce airside access or capacity in the SOLDC. The Council will support proposals in West Camp which include a sensitive re-use and repair of heritage assets consistent with the conservation of their significance and the character and appearance of the conservation area".*
- Policy 106: South Camp (Map Location 3): *"Sites providing existing airside access on land in the Biggin Hill SOLDC identified as South Camp will be safeguarded for aviation-related employment generating uses. Proposals for Class B2, B1(b), B1(c) and C1 uses will be permitted in South Camp if it can be demonstrated that the proposed uses: a - reinforce the role of the SOLDC, and b - do not impede the effective operation of other aviation related employment generating uses in the SOLDC or reduce airside access or capacity in the SOLDC. The Council will support redevelopment and if viable, realignment of infrastructure to increase the development potential of South Camp for aviation related employment generating uses. The Council will not support any proposals in this identified area that would have an unacceptable adverse impact on land identified as a Site of Importance for Nature Conservation or on landscapes and residential areas in the vicinity of the SOLDC".*
- Policy 107: Land East of South Camp (Map Location 5): *"Land in the Biggin Hill SOLDC identified as Land East of South Camp will be safeguarded for aviation-related employment generating uses. The Council will not support any proposals in this identified area that would have an unacceptable adverse impact on land identified as a Site of Importance for Nature Conservation or on landscapes and residential areas in the vicinity of the SOLDC".*
- Policy 108: East Camp (Map Location 6): *"Existing buildings in the Biggin Hill SOLDC area identified as East Camp will be safeguarded for aviation-related employment generating uses. The Council will not support any proposals in this identified area that would have an unacceptable adverse impact on land identified as a Site of Importance for Nature Conservation or on landscapes and residential areas in the vicinity of the SOLDC".*

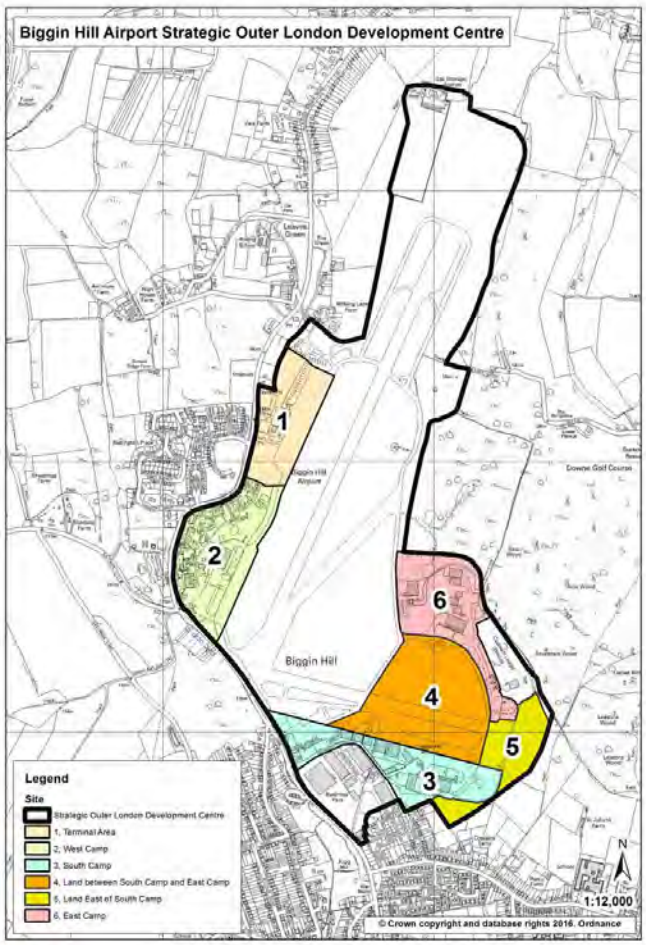


Figure 37: Biggin Hill Local Plan Policies

Source: *LBB, 2019*

Approach

9.3 This assessment quantifies the total economic footprint of Biggin Hill Airport by estimating the impact of economic activity directly on the airport ('On-Airport') as well economic activity adjacent to the airport within the Biggin Hill Airport Trading Estate, the Concorde Business Centre and Formula One Management ('Off Airport'). It estimates the current economic impact (Part 1) and the potential future impact (Part 2) if air traffic movements increase as anticipated.

9.4 The current economic impact is estimated in terms of direct, indirect and induced employment, as well as Gross Value Added (GVA), using data from a range of sources including the Office for National Statistics' (ONS) Inter-Departmental Business Register (IDBR), LBB's Local Plan (2019) and the London Centre for Aviation Technology and Enterprise's Case for Growth (2022) document. Employment data was published by the ONS in late 2022 so incorporates recent developments across the airport including:

- The delivery of a new hangar to the north of the terminal in 2016.
- The opening of new office and kitchen floorspace in the gatehouse in 2022.
- The delivery of a new hangar for Bombardier in 2022.

It does *not* include the opening of a new 50-bedroom hotel in early 2023 so the additional impact of this scheme has been estimated using best practice guidance.

9.5 The future economic impact is again estimated in terms of direct, indirect and induced employment and GVA. These impacts are calculated based on forecast changes in Air Traffic Movements as set out in the current *Biggin Hill Airport Noise Action Plan*. Industry accepted ratios between air traffic movements and

employment are used to estimate how much additional employment could be supported across the refreshed *Local Plan* period (2022-2040). This approach is taken instead of estimating the impact of potential development schemes as it represents the *minimum* economic impact the airport will have in the future. It is unclear at this point whether development schemes proposed by Biggin Hill airport are likely to be delivered over the medium-to-long term particularly given some require changes to Local Plan policy to be achieved.

9.6 The results of the analysis are compared against the draft *Economic Impact of Biggin Hill Airport* (2023) report that Biggin Hill Airport Limited reference in their representations to the Bromley Local Plan *Issues and Options* (I&O) paper. This illustrates the scale of difference that can be reported based on different tools, assumptions and methodologies employed.

Current Impact

Direct Employment

9.7 According to post-code linked employment data from the ONS's IDBR it is estimated that there are **741** 'On-Airport' FTE jobs at Biggin Hill Airport. The biggest employers are Bombardier, Biggin Hill Airport Limited, Zenith Aviation and Total AOC Solutions. Using data about where employees live from the London Centre for Aviation Technology and Enterprise's *Case for Growth* (2022) document, which sets out that 29% of airport-based staff live in the borough (local) and 66% live in neighbouring boroughs (regional), it is estimated that **215** of these FTE jobs are filled by local people and **489** by people living across the wider area.

9.8 Using the same ONS data it is estimated that there are **679** 'Off-Airport' FTE jobs within the Biggin Hill Airport Trading Estate, the Concorde Business Centre and Formula One Management. As with the 'On-Airport' employment many of these jobs will be higher-value roles in aviation, engineering and automotives with the biggest employers being Formula One Management, Autoflame Engineering and Odessa UK.

9.9 The total direct employment from both 'On-Airport' and 'Off-Airport' businesses is therefore estimated to be **1,420** FTEs. If the impact of the new Landing Hotel is added to this, which is estimated using the Homes and Communities Agency's most recent *Employment Density Guide* (2015), this number increases to **1,445** FTEs.

9.10 This is similar to the **1,515** FTE 'On-Airport' and 'Off-Airport' jobs that Biggin Hill Airport estimate to be supported across the area in their *Economic Impact* (2023) report. This data has been collected through primary research and surveys with tenants across the airport and its associated trading area.

Wider Employment

9.11 It is estimated that the supply chain spending of 'On-Airport' businesses (indirect impact) and wage spend of 'On-Airport' employees (induced impact) could support between **340** and **720** additional FTE jobs in total. This has been estimated using economic multipliers that have been determined for other airports based on their supply chain expenditure:

- Lichfield's assessment of Farnborough Airport indicates that 0.94 wider FTE jobs are supported per direct job (1.94 multiplier).
- Genecon's assessment of Leeds Airport indicates that 0.76 wider FTE jobs are supported per direct job (1.76 multiplier).
- Jacob's assessment of Edinburgh Airport indicates that 0.45 wider FTE jobs are supported per direct job (1.45 multiplier).

9.12 It is estimated that the supply chain and wage spend associated with 'Off-Airport' businesses and employees could support a further **340** FTE jobs. This is based on multipliers set out in the Homes and Communities Agency's most recent *Additionality Guide* (2014) – the multipliers used for 'On-Airport' employment cannot be used as some 'Off-Site' employment is not directly linked to the activities of the airport. The total indirect and

induced employment from both 'On-Airport' and 'Off-Airport' businesses is therefore estimated to be **680-1,060** FTEs.

9.13 The draft *Economic Impact of Biggin Hill Airport* report estimates that the total indirect and induced employment from both 'On-Airport' and 'Off-Airport' businesses is around **832** FTEs at the national level, 246 at the London level and 129 at the Bromley level. This is based on analysis of business expenditure, which led to a composite multiplier of 1.54.

Gross Value Added

9.14 The total GVA associated with direct, indirect and induced 'On-Airport' activity is estimated to be between **£51m** and **£66m** per annum. This has been estimated by multiplying the number of direct 'On-Airport' jobs by GVA Per FTE figures for the Transport & Storage sector in Bromley from the ONS and multiplying the indirect and induced jobs by GVA Per FTE figures for the national Transport & Storage sector again from the ONS.

9.15 The total GVA associated with direct, indirect and induced 'Off-Airport' activity is estimated to be around **£70m** per annum. This means the total direct and indirect impact of activity on and off Biggin Hill Airport is estimated to be between **£121m** and **£136m** per annum. Figures for 'Off-Airport' activity have been estimated by multiplying the number of direct 'Off-Airport' jobs by GVA Per FTE figures for Bromley from the ONS and multiplying the indirect and induced jobs by GVA Per FTE figures for the country.

9.16 These figures are lower than in the draft *Economic Impact of Biggin Hill Airport* report which estimates that the total direct and indirect impact is **£185m** at the national level, **£144m** at the London level and **£133m** at the Bromley level. The difference may be explained by the fact that Biggin Hill Limited had access to more granular and first-hand occupational and salary data which can allow more accurate estimates of GVA to be made.

Table 54 Direct and Indirect Employment Currently Supported by Biggin Hill Airport

	This Study (2023)		*Economic Impact Report (2023)*	
	FTEs	GVA	FTEs	GVA
Direct On and Off Airport	1,445	£121-136m	1,515	£185m
Wider On and Off Airport	680-1,060		832	

Source: Avison Young; Lichfields; Biggin Hill Airport; ONS.

Future Impact

9.17 The *Biggin Hill Airport Noise Action Plan* (2015-2020) sets out historic and forecast Air Traffic Movements (ATMs) at Biggin Hill Airport. As shown in Table 55 below ATMs decreased from 50,861 in 2016 to 46,097 in 2022, but the number is forecast to increase to 54,750 by 2025 based on market trends and recent developments at the airport - an increase of **+8,653** ATMs versus 2022. Between 2022 and 2025 the annual average change is therefore expected to be **+2,163** ATMs.

9.18 If this change is projected forward over the reviewed *Local Plan* period (2022-2040) this could see ATMs increase to over 80,000 by 2040. This is unlikely given historic trends and agreed ATM limits but it is reasonable assume that the number could increase at this rate for a further five years before levelling off taking the total ATMs to just over 65,000. In this scenario there is potential for ATMs to increase by between **+8,653** and **+10,816** across the refreshed *Local Plan* period.

9.19 If this occurs it is likely to create additional direct 'On-Airport' employment as the number of jobs at an airport generally increases in line with passenger numbers and/or freight tonnage. This is because additional ATMs

can create additional demand for a wide range of services including cleaning, maintenance, management, security, administration etc.

Table 55 Air Traffic Movements Per Year at Biggin Hill Airport

Year	Air Traffic Movements (ATMs)
2016	50,861
2017	50,090
2018	43,405
2019	39,109
2020	28,205
2021	36,763
2022	46,097
2025 (Forecast)	54,750

Source: LBB

9.20 It is estimated that an 8,653 increase in ATMs could increase direct employment by around **70** FTEs and an increase of 10,816 ATMs could increase direct employment around **145** FTEs. This is based on economic multipliers that have been used in other studies focused on the economic impact of airports, most notably Lichfield's assessment of Farnborough Airport (2022) which assumes that a 1% increase in ATMs can lead to a 0.45% increase in employment[50]. This multiplier has been selected as, like Biggin Hill, Farnborough is a 'business only' airport close to London with linked employment activity within its immediate adjacency.

9.21 This is likely to represent a *minimum* amount of future employment that will be supported 'On-Airport' as Biggin Hill Airport have ambitious plans for its expansion. This is set out in the draft *Economic Impact of Biggin Hill Airport* report (2023) which estimates that employment will increase by **1,960** and **3,240** FTEs over the next two decades due to a number of developments they are preparing to bring forward and the expected growth of existing tenants. Developments include:

- Storage uses on Land North of the Terminal Area.
- Further Education College on Land North of the Terminal Area.
- New hangar space on West Camp, South Camp, Land East of South Camp, East Camp and Land North of East Camp.
- Worker accommodation at West Camp.

The impact of these developments has not been quantified for this study as it is not known which, if any, will come forward and because policy changes may be required to enable some of these to come forward.

9.22 In terms of wider employment, using the same multipliers applied to the current direct jobs, it is estimated that an increase in direct employment of 70 FTEs as a result of increased ATMs could support up to **65** induced and indirect FTE jobs and an increase in **145** FTEs could support up to **135** induced and indirect FTE jobs. It is likely that a significant proportion of these will be located close to the airport (i.e. 'Off Airport') given the preference from supply chain businesses associated with aviation activity to cluster around airports.

9.23 In total this means that an increase in ATMs at Biggin Hill Airport could catalyse up to **280** direct, indirect and induced jobs. Using the same assumptions applied to current employment this could contribute up to **£13.6m** in GVA to the economy each year. The wider employment associated with future development as set

[50] The draft *Economic Impact of Biggin Hill (2023)* report identifies that based on current ATMs there are 76.3 FTEs per 1,000 ATMs at Biggin Hill. This relationship cannot, however, be projected forward as the number of roles required per ATM will decrease as the number of ATMs increase as many roles will be able to absorb and/or deal with the additional activity.

out in the *Economic Impact* (2023) report is estimated to be up to 1,750 which is much higher than this study given the conservative approach adopted here.

10. Appendix II: Business Survey Results

10.1 In Summer 2023, office and industrial businesses in Bromley were invited to participate in an online survey to inform this study. This exercise was supported by LBB's Communications and Economic Development teams who shared the invitation via their regular business newsletter and other relevant communication channels.

10.2 In total c30 businesses responded to this invitation across a number of sectors including Property, Business Administration, Professional, Scientific & Technical, Construction, Motor Trades, Arts, Entertainment & Recreation, Health and Other[51]. The sample was not representative of the borough's business based so results should be interpreted qualitatively.

10.3 The key messages are set out below.

Many respondents are looking for space to grow over the next 10 years…

10.4 Nearly half of businesses surveyed are looking to relocate to new premises within the next ten years for a number of reasons. Most anticipated their business expanding, whilst others required better quality or more suitable premises to meet their requirements. A small number of businesses also anticipate needing to find better value premises rather than additional floorspace. Interestingly, of those looking to move around three quarters were looking to purchase their premises either via leasehold or freehold.

Businesses are attracted to Bromley, but their future demands may not be met locally…

10.5 Of the businesses that are looking for space to grow, 90% are hoping and willing to stay in Bromley. However, more than half do not think that it will be possible to find the type of stock they need in Bromley. Some noted that there are also some 'push' factors from the borough including its 'slow planning system' and 'relatively high rents' versus alternative locations in the wider South East.

Bromley is an attractive location for businesses due to its transport links…

10.6 Respondents commented that they are attracted to Bromley for a number of reasons not least its public transport links to London and the wider South East. This was communicated when businesses were asked what they think Bromley's advantages are as a business location. The top factors noted were the borough's:

- Good public transport network for both trains and buses.
- Proximity to London and the M25.
- Busy and thriving High Street in Bromley Town Centre.
- Proximity to convenience, post offices and customers.

Some areas suffer from a lack of good parking, as well as traffic and affordability…

10.7 Conversely businesses noted that there are a number of disadvantages to the borough as a business location. Although some large employment areas are located near train stations such as Bromley South, Lower Sydenham and Oakfield Road, others are further away (e.g. Crayfields Industrial Estate/Business Park) meaning many workers rely on the use of private vehicles. As a result, some respondents noted that this reliance on private vehicles creates issues with parking, as well as traffic congestion and isolation in some locations. Other disadvantages noted by businesses include:

- Comparatively expensive commercial rents.
- Limited amenities in some locations.
- Low quality and limited commercial properties on offer throughout the borough.

[51] Responses were received from businesses based in BR1, BR2, BR3, BR5, BR7, SE20, SE26. The most common sectors were 'Other' (9), 'Property' (5), Businesses Administration (3) and Professional, Scientific and Technical (2).

There are a number of interventions that businesses commented would help to drive demand…

10.8 When asked what would make the borough more attractive to both current and prospective occupiers respondents provided a number of responses. The most common include:

- Redevelopment of under-utilised sites.
- Delivery of new high-quality employment spaces.
- Additional parking.
- The development of green spaces.
- Road upgrades to reduce traffic.

The identification of re-development and the delivery of new high-quality employment spaces is interesting as it reinforces earlier messages around a lack of appropriate stock within the borough.

Access to public transport and good value space underpins business decisions when choosing where to locate….

10.9 Linked to the above, businesses were asked which factors are most likely to influence their decisions when choosing where to locate in the future. The most important factors identified were the cost of the premises and proximity to public transport, followed by the quality of the premises and quality of life offer in areas close to the space. Many of Bromley's employment sites perform well against these metrics, though there are challenges around the quality of space and some sites (particularly undesignated sites) suffer from poor public transport accessibility.

11. Appendix III: Capacity Calculations Methodology

Typologies and Plot Uplift

11.1 *Chapter 6: Future Requirements* identifies Bromley-specific typologies that have been used as the starting point for calculating the potential capacity uplift for different sites as set out in *Chapter 7: Place Propositions*.

11.2 These typologies are a result of the analysis of existing typologies, best-practice precedents of industrial intensification and physical and sector-based opportunities. As such, they are not site-specific but intended to be applied to different locations across the borough to determine the potential for floorspace uplift. To reflect that both the size of sites and intensification opportunity will vary across locations, the plot uplifts associated with these typologies are presented in Chapter 6 as a range rather than a prescriptive figure.

11.3 For the purposes of the plot uplift calculations, two 'development scales' have been identified that could be appropriate for each plot:

- A low-level intensification typology that represents a modest redevelopment of the plot.
- A high-level intensification typology that represents a maximised redevelopment scenario of the plot.

11.4 At the borough-level, this results in a range in theoretical floorspace uplift that represents a modest redevelopment scenario of all plots to a maximum redevelopment scenario of all plots that could theoretically, though unlikely, be achieved. The table below sets out the plot ratios and plot size bands for each typology that have been used as the basis for the uplift calculations.

	INTENSIFICATION POTENTIAL BY TYPOLOGY			
Typology	**Storeys**	**Typical plot range (ha)***	**Plot ratio (%)****	**Notes**
A.1	2	0.25–0.8	105%	
A.2	2–4	0.6–1.2	175%	
B.1	1–1.5	0.6–1.2	80%	
B.2	1–4	0.4–0.8	125%	
C.1	1–4	1.25+	100%	Assumed 25% mezzanine level
C.2	2	1.25+	110%	Assumed 50% mezzanine level

*Plot ranges have served as a general guide to minimum sizes per typology but typologies may be applied outside this range if deemed appropriate at the plot level
**Plot ratios = total gross floorspace/net plot area

Identifying appropriate typologies at the level of employment clusters

11.5 The first step in the selection of typologies for each opportunity site (i.e. Lower Sydenham, Oakfield Road, Biggin Hill, Crayfields Business Park, Cray Avenue and Bromley South) has been to identify which Bromley-specific typologies are appropriate and could contribute to the growth and character at the employment area level.

11.6 Drawing from the site visits and the evidence base in the Desk-Based Site Audits, the relevant existing characteristics of employment clusters including strategic location, use profile and immediate context were first considered. An initial sift of typologies identified those that best compliment or enhance the profile of each area. A summary of relevant characteristics and how they informed the initial selection of typologies is set out in the table below.

EMPLOYMENT AREA	RELEVANT CHARACTERISTICS	INITIAL TYPOLOGY SELECTION
Lower Sydenham	A medium LSIS and a key industrial centre in the west of the borough. It is a more traditional, self-contained 'industrial park' character comprised of both lighter industrial (storage, warehousing) with some heavier industrial activities.	A.1 / A.2: Smaller sites and sites located close to Lower Sydenham station could be appropriate for lighter, stacked industrial buildings on the existing 'trading estate' typologies. B.1 / B.2: Appropriate for medium-sites, centrally located in the LSIS that currently support yard-based industry.
Oakfield Road	A small LSIS strategically located with respect to public transport, amenities, and wider green spaces. Currently supports lower density, medium-scale, light-industrial units in a mix of warehousing, storage, and manufacturing. Surrounding context is characterised by suburban residential.	A.1 / A.2: Capitalise on accessibility of the site to provide typologies with higher employment and that contribute to Oakfield Road becoming a creative manufacturing hub. B.2: Potential to include some intensified yard-based typologies to reflect a range of businesses and operational requirements.
Crayfields	Two sites with complimentary characters: a business park area to the north and a mix of light-industry, workspace and manufacturing to the south bisected and surrounded by high-quality green spaces.	C.1 / C.2: Given the strategic connectivity of the area and the availability of large and extra-large plots (1.5ha+), the area could support distribution and warehousing typologies that are more challenging to bring forward in denser employment areas.
Cray Avenue	Part of the extensive Crayfields Business Corridor SIL and the largest employment centre in Bromley. A densely utilised area that hosts a wide range of industrial (and non-industrial) uses from large-scale distribution, trading estates, yard-based manufacturing, to small sites with light-industrial units.	Given the wide range of existing uses and typologies, all typologies were deemed appropriate for Cray Avenue. Larger sites can support distribution and warehousing (C.1/C.2). Plots with close relationships to residential may be more appropriate for lighter, trading estate typologies (A.1/A.2) and some yard-based industry (B.1/B.2) should be incorporated reflecting the diversity of businesses in the area.
Biggin Hill	A medium LSIS directly adjacent Biggin Hill with industry either relating to, supporting or dependent on the airport's activities.	A.1 / A.2: A small-site within a wider trading-estate typology that could likely only accommodate smaller industrial units.

Plot-based considerations

11.7 The second step in the selection of typologies was to identify 'opportunity' plots on each site that present obvious scope for intensification. These were generally low-density plots (e.g. open storage/parking), clear plots, plots with ageing buildings or plots being used inefficiently.

11.8 The most suitable Bromley-specific typologies for each plot were then identified. Though an element of professional judgement has been used in selecting typologies, the following factors have been taken into consideration:

- **Size site and proportion**: Larger typologies, particularly storage and distribution facilities (C.1/C.2 typologies), require bigger plot areas (c.1ha+) with regular geometry that can accommodate the footprint of a large-format, rectilinear industrial unit.
- **Strategic location**: The nature of activities that a typology supports should complement its strategic location. For example, typologies that require frequent servicing of HGVs should be located with good access to the strategic road network (Cray Avenue). Similarly, plots with good public transport connectivity may be better suitable to typologies with higher job density such as stacked light-industrial units (Oakfield Road).
- **Existing uses and business activities:** Typologies should reflect the nature of the local economy and existing business activities within industrial areas. For example, the area around Biggin Hill is characterised by trading estate typologies and may be less appropriate for manufacturing or yard-based typologies.
- **Townscape**: Where employment areas border on more sensitive uses such as residential or open space, consideration has been given to the impact of the massing on the surroundings.
- **Nuisance, safety and proximity**: Where plots are in close proximity to sensitive context such as residential areas, employment centres, public open space or environmental assets, consideration was given to the uses a typology would likely support. For example, yard-based typologies are likely to be less suitable in these instances.

Methodology for calculation plot uplift

11.9 Following the identification of appropriate typologies for application within sub-areas and individual plots, the potential uplift for each plot has been calculated by applying the plot ratio to the redevelopable plot area and subtracting any existing industrial floorspace. Each step of this methodology is set out below.

I. The first step in the process has been to determine the overall plot area by measuring the extent of the 'opportunity plot' in GIS. Although this often corresponds to the land-ownership boundary, the plot boundaries have been drawn to a logical redevelopment area and may include multiple ownerships.
II. The second step in calculating plot uplift is to determine the existing floorspace within each plot using VOA or CoStar data to obtain the existing floorspace figures.
III. The next step in calculating plot uplift is to determine the potential redevelopable area of the plot. The plot ratios set out at the beginning of this section represent the potential uplift within a net plot area measured to the typology boundary (including servicing areas). However, within each plot boundary there will be a percentage of land that cannot be developed. To provide a more realistic representation of the development potential of sites, either 15% of the plot area for individual plots or 25% for larger sites which contain multiple plots have been discounted to account for the following:
    A. 15% for individual plots: buffer zones, utilities within the site, on-site parking (assumed to be minimal), inefficiencies as a result of geometries, and retained environmental features such as trees.
    B. 25% for larger sites containing multiple plots: a larger portion of the site has been discounted to allow for the above as well as primary access routes, collective car parking and provision of shared amenity spaces.
IV. Appropriate typologies are then selected based first on the characteristics of each sub-area and then on the individual plots. The plot ratio for the typology is then applied to the discounted plot area. For each plot, both a low-level of intensification and a high-level intensification scenario has been presented. The low-level scenario represents moderately intensified plots with limited vertical stacking. The high-level

scenario applies a more intensified typology with increased stacking and / or colocation to represent a maximised development potential of the site.

V. The final step is to determine the potential uplift range by subtracting the existing floorspace on the plot from the theoretical floorspace that could be delivered with the intensified typologies.

The table opposite illustrates each step in the process.

Assumptions and exclusions

11.10 The above methodology is underpinned by the evidence base set out in the Desk-Based Site Audits and site visits. However, many additional factors outside the consideration of this study will impact both whether opportunity plots are likely to come forward for redevelopment and the nature of redevelopment. It is beyond the scope of this study to consider the full extent of environmental, market and planning contexts for each plot and the key assumptions and exclusions are set out below:

I. Existing environmental site conditions including underground services, ground conditions, contamination, green spaces or other environmental conditions that will impact the feasibility of redevelopment have not been considered in the plot selection.

II. It has been assumed that there will be no retention of existing buildings within the plot boundaries.

III. While important planning considerations such as listed buildings have been taken into account when selecting plots, a detailed analysis which includes existing permissions, proposed infrastructure, TPOs, local designations or height restrictions has not been undertaken.

IV. A high-level assessment has been made in relation to the location of sites including their proximity to the existing strategic road network, neighbouring uses and townscape. However, the operational and spatial needs of surrounding businesses, the capacity of the road network and infrastructure has not been assessed.

V. The intensification of plots has been assessed on an individual basis and their interrelationship has not been considered. For example, the high-level intensification on one site will likely impact the redevelopment opportunities of neighbouring sites (an employment cluster may be able to support one 4 storey stacked light industrial scheme but not several). A detailed masterplan-led approach would be required to obtain a more granular picture of uplift potential of individual employment clusters.

VI. The proposed typologies have been developed with consideration to both the existing industrial typologies within Bromley and emerging industrial typologies across London. However, the financial or technical viability of delivering typologies at a plot-level is outside the scope of this study.

I. Measure the extent of the plot boundary is GIS.

II. Measure total existing floorspace using VOA or CoStar data

III. Calculate redevelopable net plot area by discounting between 15-25% for access, buffer zones, environmental features, ect.
= redevelopable plot area (gross) – 15% or 25%

			Plot	Buildings	Site Characteristics	Developable area		Redevelopment potential per typology[4]						Potential uplift range	
								Low-level intensification			High-level intensification				
PLOT REF.	EMPLOYMENT AREA	PLOT	Sub-area plot area[1]	Total floorspace	Current indicative plot ratio	Redevelopable plot area (either site-based or plot-based)		Typology	Plot ratio (%)	Potential (m^2)	Typology	Plot ratio (%)	Potential (m^2)	Potential lower uplift	Potential maximum uplift
			Ha	(m^2)	Total floorspace divided by sub-area	Plot[2] ha	Site[3] ha							Floorspace lower range (m^2)	Floorspace upper range (m^2)
			GIS	VOA/CoStar	Calculation	15% discounted	25% discounted							Calculation	Calculation
1	Lower Sydenham														
1.1		The Bronze Works	0.68	3,173	47%	0.58		A.1	105%	6069	A.2	175%	10115	2896	6942
1.2		Burnham Way	0.24	-	0%	0.20		A.1	105%	2142	B.2	125%	2550	2142	2550
1.3		Laker Industrial Estate	0.56	1,349	24%	0.48		B.1	80%	3808	B.2	125%	5950	2459	4601
1.4		62 Kangley Bridge Road	0.52	-	0%	0.44		B.1	80%	3536	A.2	175%	7735	3536	7735
1.5		Bromley House	0.30	637	21%	0.26		A.1	105%	2678	A.1	105%	2678	2041	2041
1.6		Latham House	0.06	-	0%	0.05		B.2	125%	638	A.2	175%	893	638	893
1.7		Clarkes of London	0.99	2,414	24%	0.84		A.1	105%	8836	A.2	175%	14726	6422	12312

IV. Select an appropriate low-level intensification typology and high-level intensification typology and apply the plot ratio to the net plot area
= plot ratio % x net plot area

V. Calculate potential uplift by subtracting existing floorspace from theoretical floorspace achievable with intensified typologies
= potential floorspace with intensified typology – existing floorspace

Plot uplift calculation by sub-area

			Plot	Buildings	Site Characteristics	Developable area		Redevelopment potential per typology[4]						Potential uplift range	
								Low-level intensification			High-level intensification				
PLOT REF.	EMPLOYMENT AREA	PLOT	Sub-area plot area[1] Ha	Total floorspace (m²)	Current indicative plot ratio Total floorspace divided by sub-area	Redevelopable plot area (either site-based or plot-based) Plot[2] ha	Site[3] ha	Typology	Plot ratio (%)	Potential (m²)	Typology	Plot ratio (%)	Potential (m²)	Potential lower uplift Floorspace lower range (m²)	Potential maximum uplift Floorspace upper range (m²)
			GIS	VOA/CoStar	Calculation	15% discounted	25% discounted							Calculation	Calculation
1	Lower Sydenham														
1.1		The Bronze Works	0.68	3,173	47%	0.58		A.1	105%	6069	A.2	175%	10115	2896	6942
1.2		Burnham Way	0.24	-	0%	0.20		A.1	105%	2142	B.2	125%	2550	2142	2550
1.3		Laker Industrial Estate	0.56	1,349	24%	0.48		B.1	80%	3808	B.2	125%	5950	2459	4601
1.4		62 Kangley Bridge Road	0.52	-	0%	0.44		B.1	80%	3536	A.2	175%	7735	3536	7735
1.5		Bromley House	0.30	637	21%	0.26		A.1	105%	2678	A.1	105%	2678	2041	2041
1.6		Latham House	0.06	-	0%	0.05		B.2	125%	638	A.2	175%	893	638	893
1.7		Clarkes of London	0.99	2,414	24%	0.84		A.1	105%	8836	A.2	175%	14726	6422	12312
														20133	37073
2	Oakfield Road														
2.1		Penge Industrial Estate	3.27	12,763	39%		2.45	A.1	105%	25751	A.2	175%	42919	12988	30156
2.2		Cambridge Grove	0.26	-	0%	0.22		A.1	105%	2321	B.2	125%	2763	2321	2763
														15309	32918
3	Crayfields														
3.1		Crayfields Business Park	2.15	9,996	46%		1.81	C.1	100%	16125	C.2	110%	17738	6129	7742
3.3		New Mills Road	1.21	-	0%	1.03		C.1	100%	10285	C.2	110%	11314	10285	11314
														16414	19055
4	Cray Avenue														
4.1		Murray Road	1.90	15,638	82%	1.62		C.1	100%	16150	C.2	110%	17765	512	2127
4.2		180 Sevenoaks Way	2.25	1,227	5%		1.69	C.2	110%	18563	A.2	175%	29531	17338	28304
4.3		Brooks Industrial Estate	1.91	7,932	42%	1.62		C.1	100%	16235	A.2	175%	28411	8303	20479
4.4		Faraday Way	0.66	5,058	77%	0.56		A.1	105%	5891	B.2	125%	7013	833	1955
4.5		Electron Trade Park	1.35	5,324	39%	1.15		C.1	100%	11475	A.2	175%	20081	6151	14757
4.6		Riverview House	0.36	-	0%	0.31		B.1	100%	3060	B.2	125%	3825	3060	3825
4.7		101 Crossway	0.31	256	8%	0.26		A.1	105%	2767	B.2	125%	3294	2511	3038
														38705	74485
5	Biggin Hill														
5.1		Airport Trading Estate	0.40	-	0%	0.34		A.1	105%	3570	A.2	175%	5950	3570	5950
6	Bromley South														
		N/A												0	0

Assumptions:

[1] assumed there is no retention of existing buildings within plots identified by AY

[2] for small plots (i.e. planning application boundary) we have discounted 15% of the plot area.
This includes buffer zones, utilities within the site, on-site parking (assumed to be minimal), ineffeciencies as a result of geometries, retained environmental feature such as trees

[3] for larger 'sites' (i.e. areas that include more than 1 plot) we have discounted an areas of 25% of the site area
This aligns with the conservative estimate in the GLA LILSE study. This is to allow for: primary access routes, collective car parking, setback, constraints from utilities and services, retained environmental features, and provision of shared amenity spaces

[4] we are allowing for 2no. scenarios that consider a low-level intensification opportunity and a high-level intensification. The high-level intensification scenario is forward-looking and assumes that some higher-density typologies may be suitable if current pressures on industrial land is sustained or increases

12. Appendix IV: Lower Sydenham SIL Assessment

12.1 There is no clear guidance or criteria setting out what constitutes Strategic Industrial Land (SIL) versus Locally Significant Industrial Land (LSIS), though there are a number of descriptions related to their function, scale, importance and character across various policy documents associated with past and present London Plans.

12.2 One of the clearest descriptions is set out in the *Land for Industry and Transport* Supplementary Planning Guidance (2011) which was produced for a previous iteration of the London Plan but still holds true in the current policy context. An assessment of Lower Sydenham against this description, and particularly the Preferred Industrial Locations (PILs) description, is set out in the table below.

12.3 This assessment shows that the site aligns closely with the SIL description particularly in relation to its scale, connectivity, uses and occupiers – this is demonstrated by the colour coding provided below[52]. This means that there may be scope to upgrade its status from an LSIS to a SIL provided the GLA agree with the broad assessment provided. This would give the site more status, and provide LBB with a stronger rationale to resist the loss or dilution of industrial activity in the area.

Characteristics	Lower Sydenham Assessment
• Generally over 20 hectares in size, though where there is particular pressure on industrial land smaller sites over 10 hectares can be of strategic importance.	• The site is 16.8Ha, which is reasonably close to the 20-hectare threshold and well above 10 hectares. There is particular pressure on industrial land in the area due to highly constrained supply.
• Typically located in close proximity to the strategic road network and many are well located with respect to rail, river, canals and wharfs.	• The site's main advantage from a connectivity perspective is the presence of Lower Sydenham station which offers rapid connectivity to Central London via a number of important town centres. It also offers reasonable road connectivity given it is located around 5 minutes' drive from the South Circular.
• Provide capacity to accommodate land for transport, utilities, energy generation, police, community safety infrastructure and new emerging industrial sectors.	• The site hosts a number of these uses such as the Stagecoach bus depot, Kangley Bridge Road Water Treatment Works, Clarkes Coaches coach depot, CEMEX concrete plant and Latham Skips waste processing facility.
• Can provide affordable space for small and medium-sized enterprises (SMEs).	• The Gardner Industrial Estate, Abbey Trading Estate and Metro Business Centre offer a number of self-contained light industrial workshop type spaces that are well-suited to SMEs.
• Physical separation from housing and the ability to operate 24-hours a day.	• Parts of the site, particularly along Kangley Bridge Road, are well separated from housing, but the extreme north and south of the site are close to residential uses restricting activity.
• Preferred Industrial Locations (PILs) are characterised by firms with less demanding environmental requirements and typically host industrial, general industrial and storage & distribution uses. They are also suitable for waste management, recycling and transport type activities.	• The site is dominated by traditional industrial occupiers undertaking a spectrum of 'messier' activities ranging from steel fabrication to water treatment. These are complemented by a range of other trade counter type outlets which service South London's businesses and residents. Dominant occupier groups include: o Construction (e.g. Penlow & Co, Rise Contracts, Wandsworth Sash Windows, Made Up Ltd).

[52] Green = clear alignment; orange = some alignment; red = limited alignment.

	o Manufacturing/Fabrication (e.g. London Double Glazed Units, London Engineering, Stanmore). o Creative (e.g. Passion Bakery, Sarah Barron Productions, Made Up, Cover it Up Ltd). o Trade Counters (e.g. Screwfix, IS&G Steel Stockholders, Cameo Event Hire, Geology Ltd). o Servicing (e.g. Abbey MOT Station, Floor Sander Hire, Anglian Building Products, Newbridge). o Recycling (e.g. Latham Skips). o Professional (e.g. Millington Associates, Integra, Ablitts Solicitors). o Transport (e.g. Clarks and Stage Coach).
• PILs are not normally suitable for B1(a) office and B1(b) uses, although some ancillary B1(a) is acceptable. They are not normally suitable for large scale office development.	• There is very little dedicated office space across the site. Most office space is ancillary to industrial uses.
• PILs can be suitable for other uses of an industrial nature, including some classified as *sui generis* such as car breaking, metal recycling, aggregate processing, iron and steel fabrication.	• There are a number of metal fabrication businesses across the site such as Stanmore and London Engineering.

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