



1

London's Loss of Industrial Land

Jessica Ferm reviews the implications for planning, urban design and the management of the built environment

In the last fifteen years, since 2001, London has lost more than 1,300 hectares of industrial land (equivalent to about 1,800 football pitches), mostly for housing redevelopment. It is generally assumed that this loss is simply a reflection of the ongoing decline of industrial jobs since the middle of the 20th century, a symptom of the city's transition from an industrial to a post-industrial economy, or from a manufacturing to a service based economy, as production has moved to cheaper locations elsewhere.

Indeed, the Mayor of London has been planning for a transfer of industrial land to other uses since the first London Plan was produced in 2004. Boroughs are classified according to the extent of transfer that is planned for, either restricted, limited or managed, each has a numerical target and London as a whole has a cumulative target or annual benchmark. But herein lies the problem. In reality, London lost approximately double the planned target between 2001 and 2011 and this has risen to three times the planned target in the last five years (2011-2015), according to the Greater London Authority's most recent study undertaken by consultants, AECOM. In other words, two thirds of the actual loss was not anticipated in the London Plan, and the figures do not take into account further loss that is already in the development and planning pipeline.

This might not be such a worry if redevelopment was indeed addressing problems of vacancy and dereliction on industrial sites, but the emerging evidence suggests otherwise. For many years now, local boroughs have been required to review their employment land in order to understand the balance of supply and demand. These employment land studies reveal that in boroughs close to the Central Activities Zone (CAZ) – where there is the greatest concentration of businesses in London – vacancy rates are low and supply is not able to meet demand from a range of occupiers that require a central London location. In boroughs

further from the CAZ, such as Lewisham in south east London, vacancy rates are higher than the optimum, but the consultants report a mismatch between what the industrial stock offers and what occupiers demand.

This lack of choice for growing companies, or companies locating from elsewhere, leads to a spiral of decline, which then makes sites ripe for redevelopment. It is this process that leads to property speculation on sites that are still viable for employment. In New York, there is already plenty of evidence that the ongoing loss of industrial sites and premises is primarily a result of real estate speculation, not de-industrialisation. The evidence emerging in London seems to suggest the same.

DOCUMENTING SPACE

London's larger industrial areas have been the subject of more detailed surveys in the last few years. Foot soldiers from the Mayor's regeneration team, students from Cass Cities at London Metropolitan University and UCL, and teams of volunteers working for community and voluntary groups within the independent Just Space network, have painstakingly documented what is going on behind the often blank façades of industrial sheds. This work has revealed the vibrancy and diversity of activities in industrial areas.

1 Railway arches, typical industrial buildings in Southall, London

Only a third of jobs on industrial land are in manufacturing, and the sheer variety of other activities emphasises the futility of arguments that point to the loss of manufacturing jobs as justification for the continued loss of industrial land. There are a variety of businesses servicing the city: couriers, office supplies, commercial cleaning companies, security firms, catering companies, food processing, lift repair, photocopier repair, and car repairs. There are waste recycling businesses, utility companies, there is land for transport, distribution and warehousing. There are small (often creative) firms and people – model makers, theatre set designers and prop makers, photographers, musicians, and artists – who need either large, flexible or affordable workspace, difficult to find elsewhere. Without a stock of unoccupied industrial buildings in London, we would not have ‘secret cinema’, artists’ collectives, informal events spaces, or opportunities for film production. Industrial buildings are also increasingly providing a home for voluntary and community organisations, charities, churches and other faith organisations.

MAKER SPACES

Then, of course, there are still many manufacturing companies and maker spaces occupying space where people are making things. Lots of large manufacturers have moved elsewhere, but many others remain, and there has been a proliferation of smaller manufacturers serving niche markets. Food and drink manufacturing has seen particular growth in London – the large bakeries such as Warburtons, Allied and Hovis have all expanded and been joined by micro-companies making baklava pastries, artisan bread, organic juice, sushi and specialty beer. In Park Royal, northwest London, the concentration of food and drink manufacturers, and supporting firms such as wholesalers and cash-and-carries, mean it is now known as London’s Kitchen.

Many of these companies also have public-facing food and drink outlets. For example, the Middle Eastern bakery and sweets wholesaler Patchi, has an attached cafe which is open 24-hours a day in the month of Ramadan, serving a wide customer base and benefiting from the flexibility of opening hours made possible by the lack of nearby residents. A sushi production company runs a chef training school on site. Here the distinction between manufacturing and services blurs. There has also been a revival of traditional craft-based or artisanal manufacturing, including bespoke furniture makers, handbags and clothing, wood carvings, luxury and bespoke fashion. Other companies are using the latest technology in 3D printing to make customised products ranging from toys and jewellery to medical devices.

London continues to be of importance to manufacturers seeking to tap into the broader national and international market. London’s goods exports represent about 13 per cent of national exports and growth sectors include medicines, telecommunications, food and drink, and clothing. The nature of manufacturing is certainly changing in London, but it is not dead.

SUPPORTING ROLE

The majority of businesses occupying industrial premises are critical to keeping our city functioning at a very basic level. As our economy and population grows, and people become increasingly focused on convenience and quality, there will surely be more demand for such space, not less. Assuming these businesses can be pushed further out of London ignores the impact this will have on carbon emissions and congestion, and the evidence that these businesses tend to be locally dependent and part of a delicate local industrial ecology, where suppliers, customers and employees rely on a network of interdependent relationships. Relocation may turn into business closure.

The broader economy is not only dependent on the variety of businesses occupying industrial premises; these businesses directly contribute to the resilience of the economy, provide a range of good jobs, and opportunities for what economists call upward mobility. Such jobs are few and far between, these



3



2

days. Finally, the mere existence of these activities contributes to a more interesting, more vibrant city. It breaks up the homogeneity of modern development, it creates a bit of noise, provides an element of surprise in the urban landscape, creates some mystery, and provides opportunities for the unexpected.

SHIFTING PRIORITIES

This all adds up to a convincing argument for the continued need for industrial space in our city. But all of these arguments are being dwarfed by the bigger problem of a shortage of housing. In other words, relatively speaking, and in political terms, it is seen as a much smaller problem. The population projections prepared for London’s 2050 Infrastructure Plan predicted that there will be a growth of 3.5 million people – a rise of 37 per cent – between 2011 and 2050. Translated into housing targets in 2015, this means an annual target for Greater London of

2 Upholsterers in Calvert Street, Shoreditch, London
 3 Making dresses for River Island at Santwynn garment manufacturers, drawings by Lucinda Rogers



4

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42,400 homes per year, representing a 31 per cent increase since previous targets were prepared in 2011. To help local authorities deliver these ambitious targets, the Mayor identified a number of Opportunity Areas and Areas for Intensification in the London Plan, and with each iteration new ones are added.

Most recently, the delivery of homes has been further facilitated by the designation of Housing Zones, where planning processes are streamlined and local authorities receive grants to facilitate delivery. Many of these were previously protected industrial sites, but their release has been justified by these areas' proximity to public transport (industrial sites were historically located near railways) and the fact that they are being released in a coordinated, rather than a piecemeal way. Boroughs often further justify redevelopment on the basis that the industrial land is of poor quality.

In the face of such ambitious housing targets, a U-turn on Opportunity Areas and Housing Zones is unlikely. Indeed politicians who have made the case for simply protecting industrial land in London have been derided as providing an obstacle to solving the housing crisis. This conundrum has led to a new interest – amongst politicians and public sector officers in London, as well as architects, urbanists and industrial developers – in thinking outside the box to find a solution where we can effectively tackle both problems together. Some of what takes place on industrial land still produces noise and dirt to the extent that it is not compatible with housing. But improvements in technology mean that many manufacturing and industrial processes are cleaner and quieter than they once were, certainly no worse than a supermarket or restaurant. And, as described, there are lots of business activities on industrial land that cannot be described as either manufacturing or industry.

In design terms, it must be possible to reconcile these activities and integrate space for industry and housing in a way that works, and creates a more interesting, integrated and lively city

than we currently experience. This would certainly meet aspirations of achieving more mixed and compact cities, but it would also help residents to come into contact with, and better appreciate London's diversity of economic activity. This must be a good thing.

MIXED USES

However, achieving it without diminishing the overall supply or impacting on the affordability and suitability of workspace for a range of occupiers is our biggest challenge. So far, planners have tried to lead the way on achieving a more mixed city, by giving parcels of land, that were previously protected for industrial use, a new mixed use designation, where integration of housing and employment uses is encouraged. The problem is that, in practice, this has rarely led to any significant employment coming forward on these sites, and where it does, industry is rarely part of that mix.

Although planning policy could do a better job of prescribing the mix that is required and expected on the site, we need better urban design solutions to come forward, which could demonstrate the opportunities and possibilities to developers. This could be done through public sector-led demonstration projects. It might even come from the so-called grassroots. For example, on the Cedar Way industrial estate north of Kings Cross, a coalition of businesses and residents are resisting the Council's sell-off of their industrial estate for residential development. Instead, they are developing an alternative community-led delivery model, which would retain all existing industry on the site, but deliver the Council's housing targets.

Once workable design and delivery solutions have been found, strong leadership and partnership working will be required if change is to be implemented on a scale and at a speed that will prevent irreversible damage to the industrial economy. ●

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4 The Building BloQs pay-as-you-go workshop in Enfield: 11,000 sq ft of space with equipment