

Industrial & Logistics: Can London Deliver?



The industrial and logistics sector is a key component of the infrastructure that keeps London running and is increasingly becoming a more integral part of discussions about the future of our city.

This NLA research paper looks at the latest trends, challenges and opportunities in the industrial and logistics sector. From co-location to multi-level, the report presents alternative responses to pressing issues. The project showcase in this publication also evidences the innovation and ambition of a sector that wants to deliver more for London.

In partnership with



This research paper was published by New London Architecture (NLA) in February 2023. It forms part of NLA's year-round Industrial & Logistics programme.

nla.london | [#NLAIndustrial](https://twitter.com/NLAIndustrial)

© New London Architecture (NLA)

Contents

4 [Foreword](#) →

6 [Executive summary](#) →

8 [Introduction](#) →

14 [Three questions for the capital](#) →

[How can London deliver enough of the right sort of industrial space?](#) →

[How can we rethink the logistics network?](#) →

[Can logistics be a good neighbour and employer?](#) →

35 [International solutions](#) →

39 [Testing scenarios](#) →

41 [Viewpoints](#) →

53 [Project showcase](#) →

80 [Endnotes](#) →

81 [Acknowledgements](#) →

83 [Company profiles](#) →

Foreword

*By Peter Murray OBE,
Co-founder, New London Architecture*

Jules Pipe, Deputy Mayor of London for Planning, Regeneration and Skills, opened the NLA's exhibition *WRK-LDN — shaping London's future workplaces* back in 2016 soon after Sadiq Khan had been elected as Mayor. As we toured the show, I remember discussing with the Deputy Mayor the findings of the research which showed that land and space for commercial and industrial uses were under threat due to massive demands for housing and higher land values. Uncontrolled office-to-residential developments had resulted in the loss of thousands of square metres of office and industrial spaces across the capital.

About 50 per cent of industrial land in central London had disappeared since 2001, and vacancy rates for industrial spaces were nearing unsustainable levels. Although the exhibition took place some time before COVID, even then it was obvious that greater demand for online retailing meant that people expected purchases to be delivered in ever shorter timescales, and so good locations with easy access to central London were increasingly sought after.

We recommended expanding exemptions to permitted development rights to protect London's designated

industrial and commercial land and spaces as a priority.

We highlighted the new types of buildings that integrate living, working, making, logistics, manufacturing and leisure that were starting to appear in major cities worldwide.

We suggested that, as land costs remained high, the need to accommodate more uses in less space required greater density and intensification of development. Bold steps were needed, the research found, to ensure that workspace was integrated within new mixed-use building types, and not lost to higher-value uses.

Local authorities should encourage discussions, we said, between developers, space managers and occupiers to create more mixed-use schemes and more innovative typologies of design and development that accommodate diverse uses. Design-led solutions for industrial schemes could address the critical need to accommodate industrial and logistical uses closer to the potential customer at a time when land values are increasing.

The Draft London Plan published nearly a year later

in July acknowledged that the capital had released industrial land three times faster than planned. It included directives to boroughs and developers, with clear instructions to "support and sustain Strategic Industrial Locations (SIL) by considering opportunities to intensify and make more efficient use of land in SIL" (in accordance with Policies E4 to E7) specifically in Opportunity Areas to ensure their growth and regeneration potential was fully realised. It suggested that development proposals should be proactive and encourage the intensification of business uses in Use Classes B1c, B2 and B8 occupying all categories of industrial land by introducing small units, developing multi-storey schemes, and generally using land more efficiently through higher plot ratios.

What neither NLA nor the Mayor foresaw was the rapid increase in demand for home deliveries as a result of COVID and the dramatic shift in the value of residential and industrial land.

This report builds on NLA's studies of seven years ago and updates its thinking in light of these fast-changing circumstances. It shows how the design and development community is responding positively to the needs of the industrial and logistics sector and its vital role in supporting London's economy.

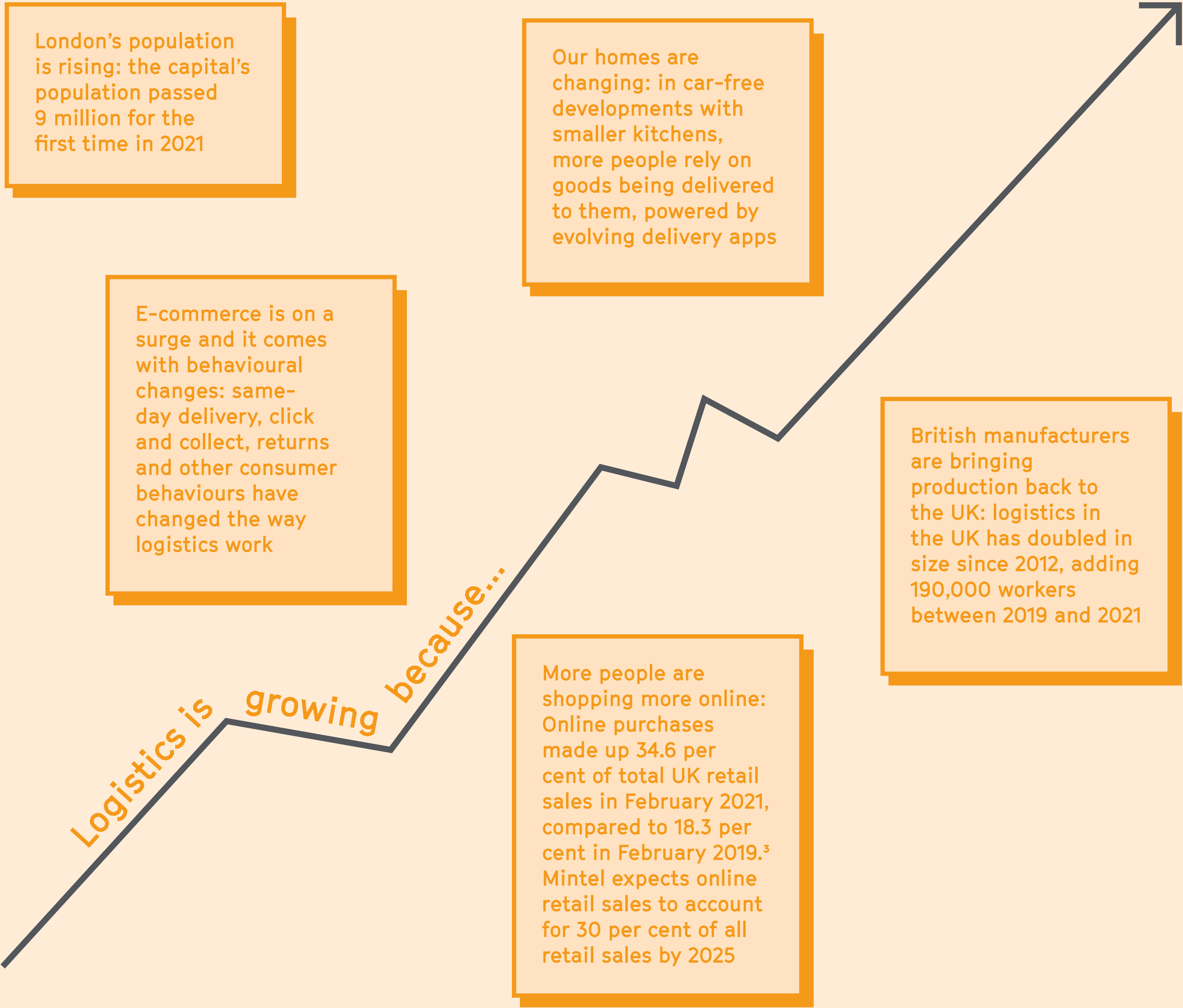


Meridian Water Masterplan by Mæ for London Borough of Enfield

Executive summary

The industrial and logistics sector is a key component of the infrastructure that keeps the UK and London running. In fact, it is integral to the UK economy with £232 billion of GVA (a 14 per cent share of the total economy) and 2.8 million industrial and logistics jobs in England.¹

The logistics industry has increased over the pandemic and the rate has been normalised, with 39 per cent of road freight firms planning to increase the size of their fleets.² In London, this growth is driven by consumer demand, commercial realities and other factors:



However, in the last 20 years, London has released 24 per cent of its industrial floor space to other uses. In this report, we present three key questions for the capital and explore possible solutions:

How can London deliver enough of the right sort of industrial space?

In this section, we look at strategies to rethink industrial uses, including:

- Co-location*: housing logistics facilities with other uses
- Intensification*: making the few sites in existence work harder
- Re-use*: reworking existing buildings
- Last-mile hubs*: setting up more depots nearer to where people live
- Land designation rethink*: alternative options to free up more land within the M25

How can we rethink the logistics network?

In this section we look at a few examples of how to reimagine the logistics network:

- Electric: Using electric modes of transport where possible
- Reduce vehicle size: Reducing vehicle size is more achievable than adapting buildings
- Consolidation centers: To reduce delivery time
- Integration: Logistics operators working together with planners.

Can logistics be a good neighbour and employer?

Logistics hasn't always been seen as a good neighbour among politicians, local authorities and the public. But things are changing; thoughtful architecture, placemaking and landscaping are proving to be part of the answer, alongside varied job opportunities for local residents.

Introduction

The idea for this report was seeded back in 2016 when NLA published its *WRK/LDN* report. That research explored how the capital could ensure its future resilience through its provision of space and land for business. The report pointed out that London would “have to work very hard to attract and retain the best global talent”, which meant good quality, well-positioned, affordable workspace. “Yet space for commercial and industrial uses are under threat as the demand for housing pushes up land prices and planning policies favour conversion of offices to residential use.”⁴

Since then, the logistics sector in the UK, which relies on industrial land use, has had a growth spurt. According to economic consultancy Frontier’s 2022 report, *The Impact of Logistics in the UK*, logistics is one of the country’s fastest-growing industries, having doubled in size since 2012 and adding 190,000 workers between 2019 and 2021. By the end of 2021, the industry employed 2.6m workers across the UK, according to the report, which was commissioned by Amazon and supported by Logistics UK.⁵

As a result, today more spaces for logistics are needed within urban locations to help keep London functioning as a modern city and satisfy the rising demand.

However, in the past 20 years, 24 per cent of industrial floor space in the capital has been released to other uses, mainly housing. And with over 30 per cent of London’s industrial land unprotected by designation, experts in the industrial sector continue to stress the challenges and issues we must face to keep London running.

Until recently industrial land values were lower than everything except agriculture, but today there is no shortage of investment money for this sector. Tim Cutts, planning policy team leader at Southwark, has experienced this on the ground. “We’ve seen massive growth in demand, rents are going up, industrial sites are competing in value with resi.”

Some industrial sites which had been granted residential planning permission are even switching back to industrial, doing the so-called double-flip. Tom Alexander, director at Aukett Swanke, has seen this on the ground. “In the last six months, we’ve been asked to look at a few schemes that were industrial and residential, and to take off the residential part and add more industrial with B class and E class, whilst enabling other or future uses such as life sciences, workspace and public residential space.” These are in several areas including Southwark, Tower Hamlets

190,000

new logistics workers
between 2019 and 2021

2.6m

workers employed across the
UK by the end of 2021

and north of Hackney. These rapid changes bring to the fore the need to manage this growth and plan for an industrial framework that can adapt to changing dynamics.

Working hand in hand with the industrial sites are the logistic uses which refer to the business of moving and storing goods, equipment and inventory between different points in the supply chain. For a manufacturer or producer, logistics starts with the incoming supply of raw materials (inbound) and goes on to the delivery of finished products to customers or end users (outbound).⁶

Inbound includes ordering, receiving, storing, transporting and managing incoming supplies. Outbound involves order fulfilment, packing, shipping, delivery and customer service related to delivery. An operational warehouse is split into two parts: one for storage, and one for inbound and outbound activity. In general, logistics plays out in big warehouses on city outskirts; deliveries are sent from there to smaller distribution centres further in; deliveries are then allocated to still smaller ‘last mile’ hubs/depots, which move goods on to the customer, typically at a home address. Logistics ranges in scale from big global firms transporting millions of different items around the world, to small, local, independent outfits shifting one product type a few miles up the road. Both are important.

In this report, we look at the latest trends, challenges and opportunities in the industrial and logistics sector. Here we consider both the industrial buildings in which various manufacturing activities are carried out — from production to the storage of finished goods — and logistics spaces dedicated to the distribution of products and materials manufactured by industrial activities, with a particular focus on the latter logistics infrastructure that allows for a modern lifestyle in London.

A major part of our research process has been interviews and roundtable discussions with sector leaders who suggest that what we need is a London-wide strategy to protect and intensify the remaining industrial land, and to support industrial and logistics accommodation in new locations. This expansion can, and must, add to — rather than detract from — the idea of London as a good place to live, work and visit.

Solutions highlighted here include a wide range of options from co-location (pairing up logistics with other activities like housing) to intensification (such as multi-storey logistics centres), and should be considered as potential options to inform the future planning of the capital. The project showcase in this publication also evidences the innovation and ambition of a sector that wants to keep London running.

The Use Class System

The current Use Classes were last updated on 1 September 2020

Class B includes:

B2: general industrial — use for industrial process other than ones falling within class E(g) (excluding incineration purposes, chemical treatment or landfill or hazardous waste)

B8: storage or distribution — this class includes open air storage

Class E

Commercial, business and service, includes industrial processes

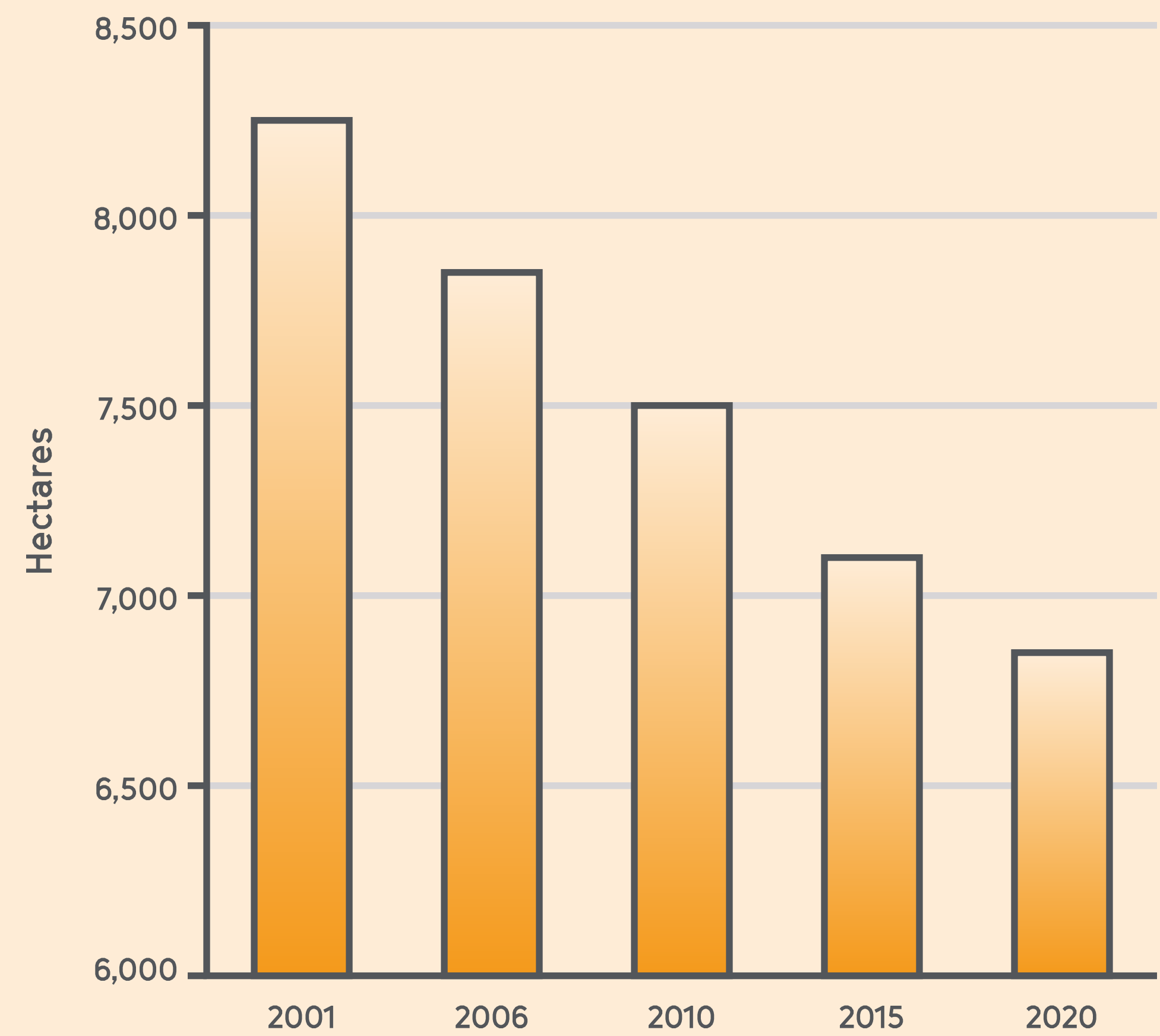
Sui Generis

'Sui generis', meaning here ‘in a class of its own’, includes scrap yards, or a yard for the storage/distribution of minerals and/or the breaking of motor vehicles

You can change use from B8 to B2 within Permitted Development, but you can't change the other way, because typically that would mean the site would become more vehicle heavy

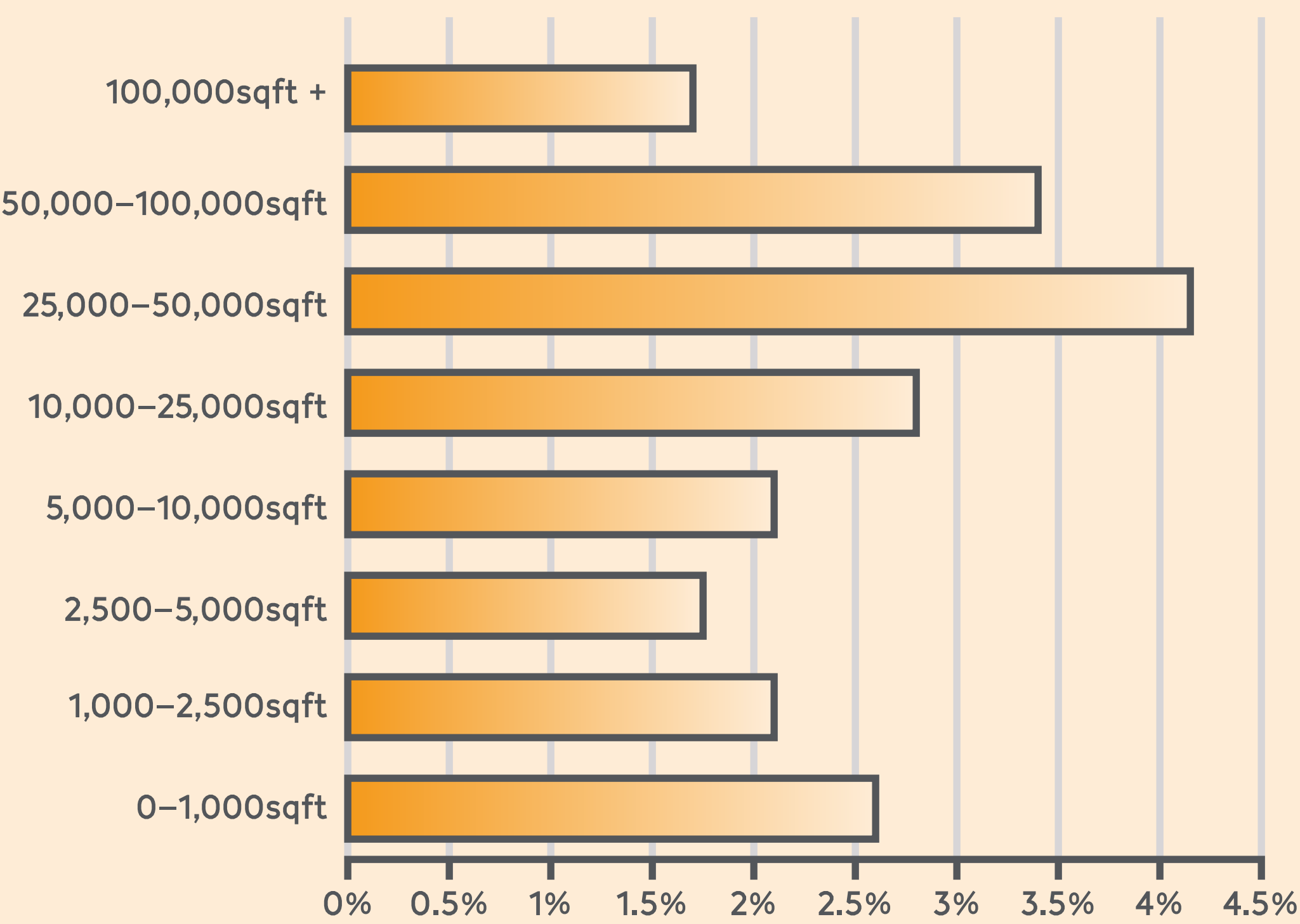
Facts and figures

Land in Industrial Use in London

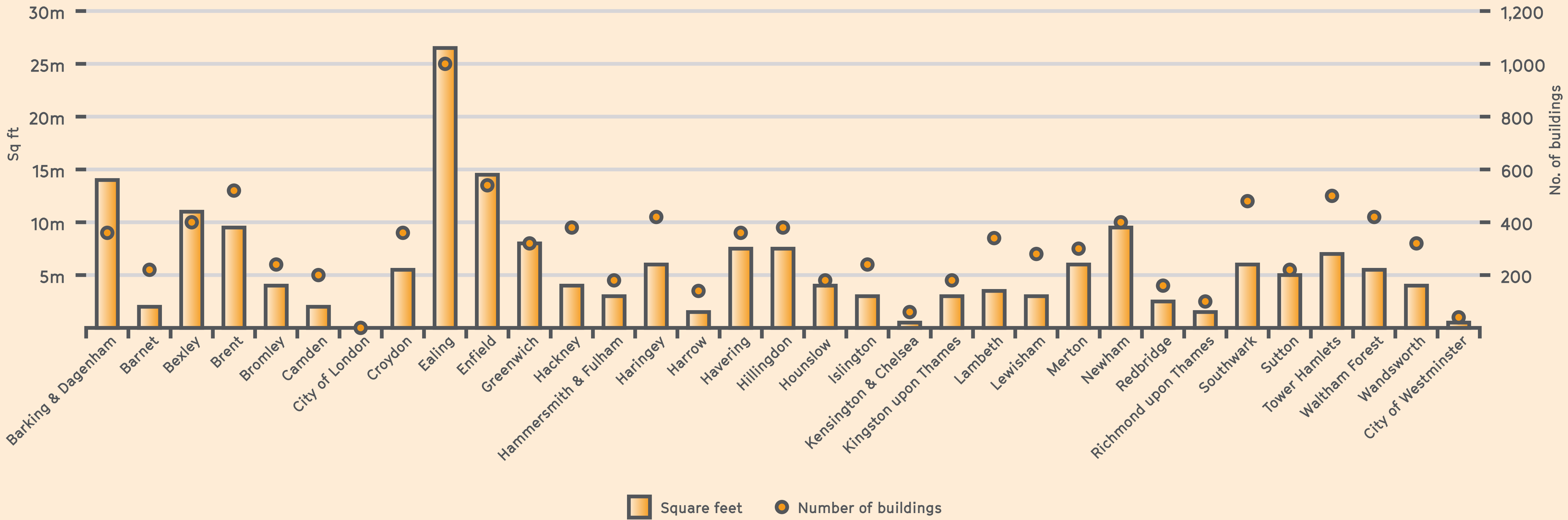


Source: London Industrial Land Supply Study 2020 – Executive Summary. © Greater London Authority, prepared by AECOM, January 2023.

Building vacancy rate by size band in London in 2021

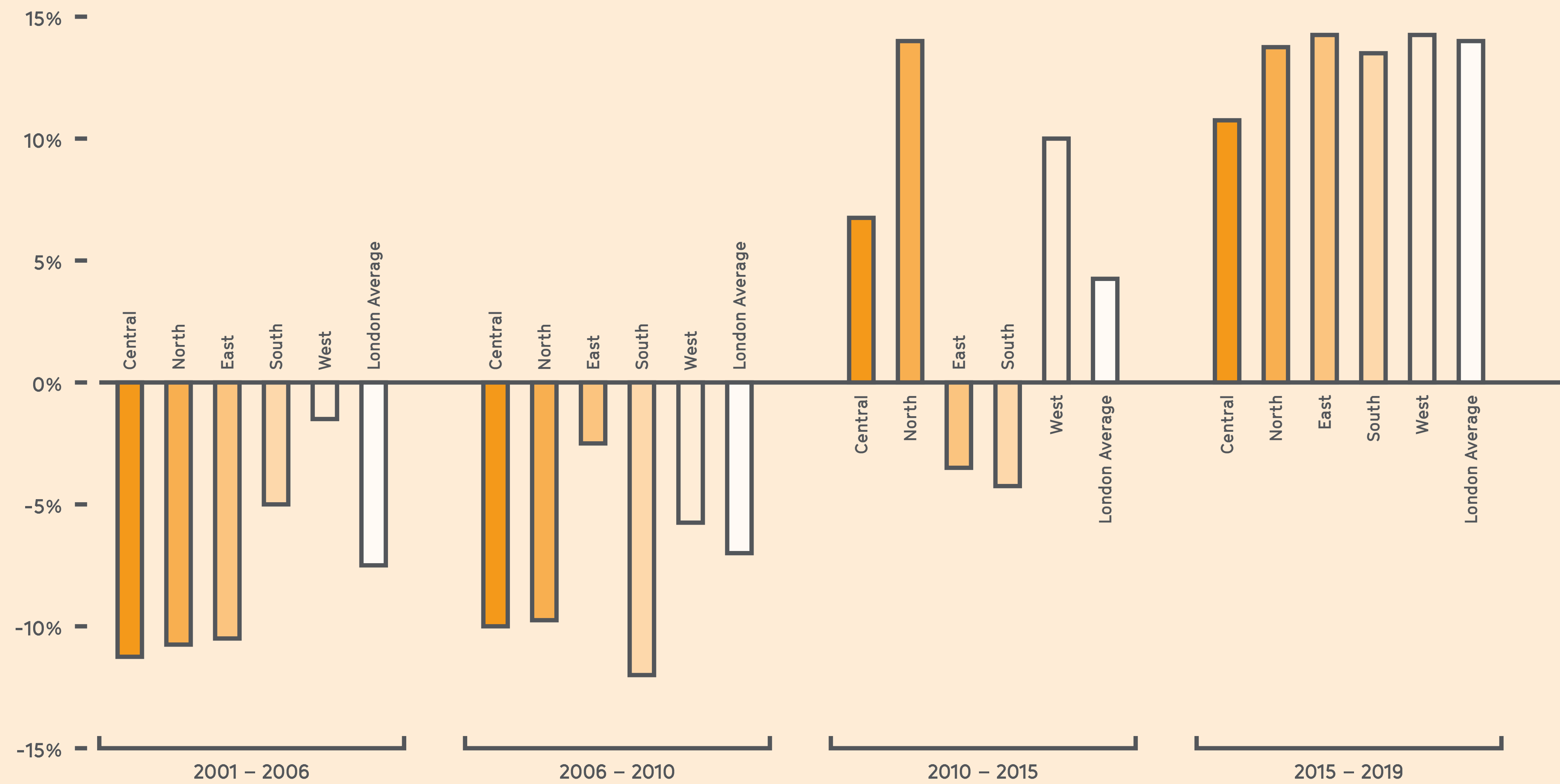


Industrial floorspace and buildings by borough



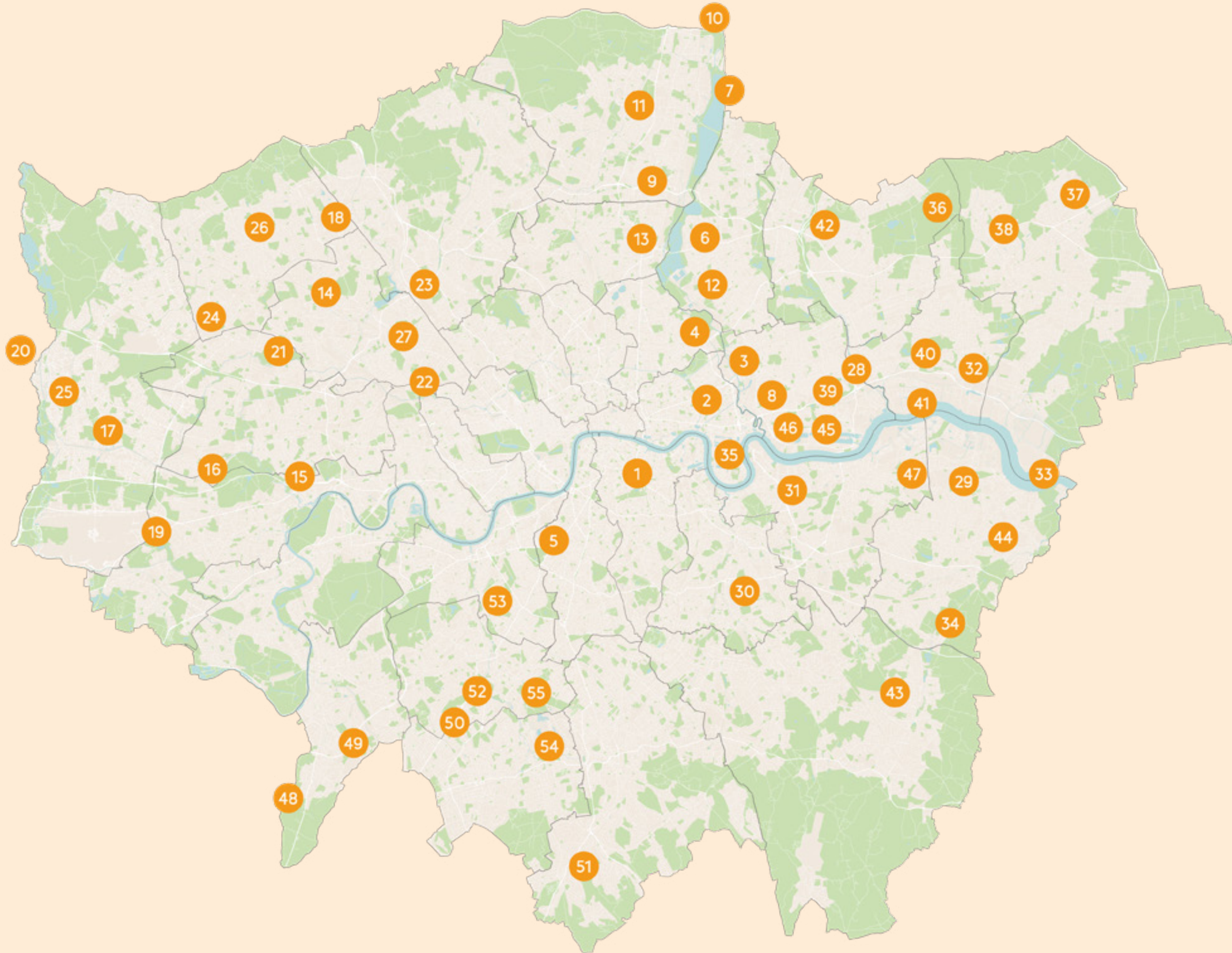
Source: London Industrial Land Supply Study 2020 – Executive Summary. © Greater London Authority, prepared by AECOM, January 2023.

Change in industrial employment across London between 2001 to 2019



Source: London Industrial Land Supply Study 2020 – Executive Summary. © Greater London Authority, prepared by AECOM, January 2023.

Strategic Industrial Locations (SIL) in London



- | | | | |
|----|---|----|---|
| 1 | Bermondsey, Old Kent Road, Surrey Canal Area | 31 | Charlton Riverside |
| 2 | Empson Street | 32 | Dagenham Dock / Rainham Employment Area |
| 3 | Fish Island / Marshgate Lane | 33 | Erith Riverside |
| 4 | Hackney Wick | 34 | Foots Cray Business Area |
| 5 | Queenstown Road, Battersea | 35 | Greenwich Peninsula West |
| 6 | Blackhorse Lane | 36 | Hainaut Industrial Estate |
| 7 | Brimsdown | 37 | Harold Hill Industrial Estate |
| 8 | British Gas Site / Cody Road | 38 | King George Close Estate, Romford |
| 9 | Central Leaside Business Area | 39 | London Industrial Park |
| 10 | Freezwater / Innova Park | 40 | Rippleside |
| 11 | Great Cambridge Road | 41 | River Road Employment Area |
| 12 | Lea Bridge Gateway | 42 | Southend Road Business Area |
| 13 | Tottenham Hale | 43 | St Mary Cray |
| 14 | East Lane | 44 | Thames Road, including Crayford Industrial Area |
| 15 | Great West Road, Brentford - Transport Avenue | 45 | Thameside East |
| 16 | Great Western | 46 | Thameside West |
| 17 | Hayes Industrial Area | 47 | West Thamesmead / Plumstead Industrial Area (including White Hart Triangle) |
| 18 | Honeypot Lane, Stanmore | 48 | Barwell Business Park |
| 19 | North Feltham Trading Estate | 49 | Chessington Industrial Estate |
| 20 | North Uxbridge Industrial Estate | 50 | Kimpton Industrial Area |
| 21 | Northolt, Greenford, Perivale | 51 | Marlpit Lane |
| 22 | Park Roval | 52 | Morden Road Factor Estate and Prince George's Road |
| 23 | Staples Corner | 53 | North Wimbledon |
| 24 | Stonefield Way / Victoria Road | 54 | Purley Way and Beddington Lane Industrial Area |
| 25 | Uxbridge Industrial Estate | 55 | Willow Lane, Beddinton and Hallowfield Way |
| 26 | Wealdstone Industrial Area | | |
| 27 | Wembley | | |
| 28 | Beckon Riverside | | |
| 29 | Belvedere Industrial Area | | |
| 30 | Bromley Road | | |

Source: Greater London Authority, (2021); The London Plan

Three questions for the capital

In this section we present three pressing questions for the capital and explore possible solutions. But first let's look at some of the reasons behind the recent exponential growth of demand for logistics.

The arrival of the smartphone 15 years ago and the emergence of the app economy, boosted the nascent e-commerce, creating m-commerce and continues to fuel the rise of online shopping. The research from Attest's UK direct-to-consumer (D2C) report in 2022 shows that 6 in 10 Brits use their smartphone to shop online. Companies such as Amazon completely transformed customer expectations around convenience, speed, price and selection when it comes to e-commerce shopping. The pandemic only accelerated and intensified these trends. The rise in logistics, changes in demography and the way planning policy is transforming how we live, have all had an impact on these changing trends. Here are other contributing factors to take into consideration:

There are more of us

In 2020, London's population passed 9 million for the first time, according to the Greater London Authority (GLA). It's been growing steadily since the 1980s when it was at a low of around 6.8 million. More people need more stuff.

Covid lockdowns have exacerbated online shopping

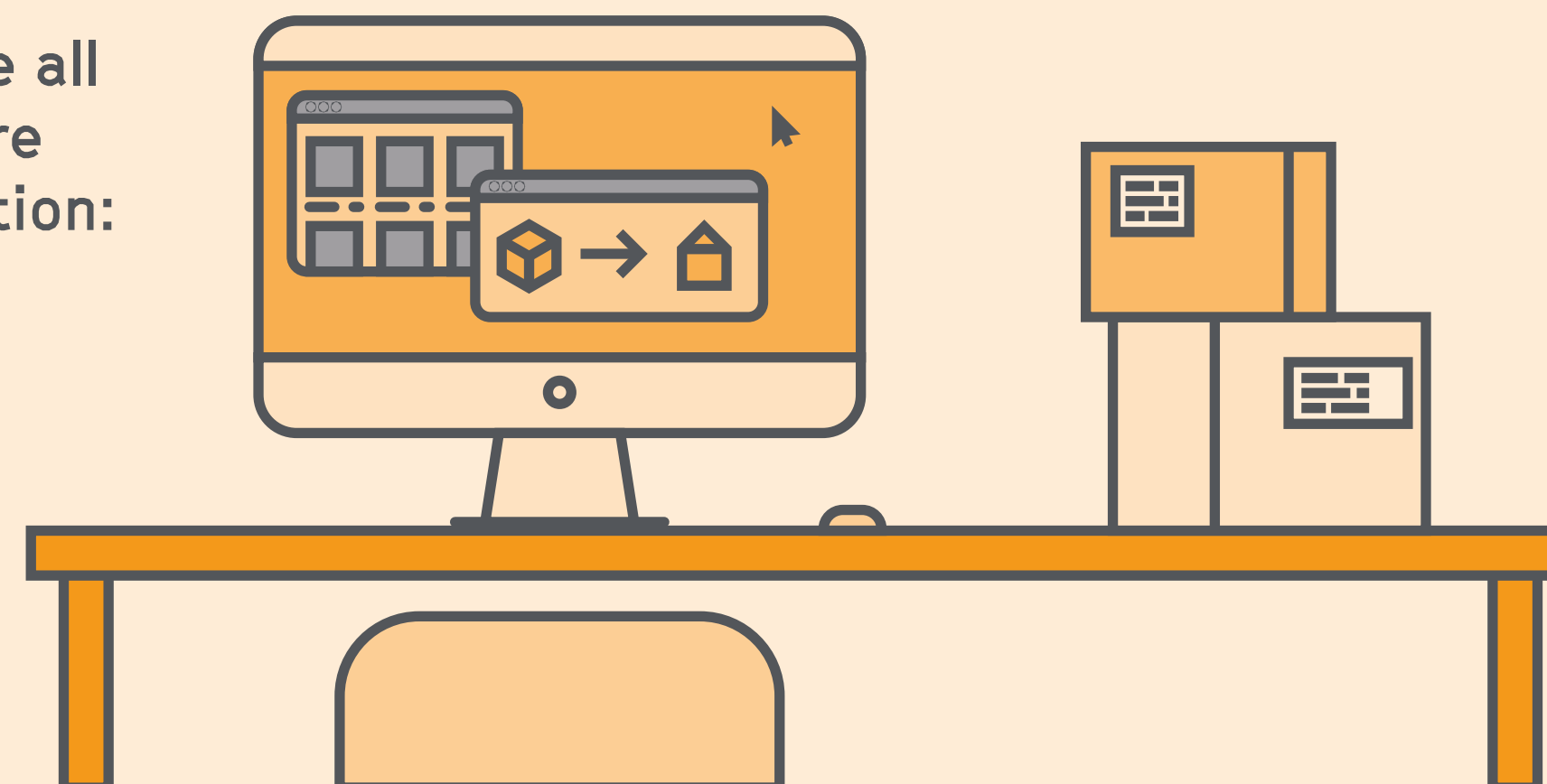
Global e-commerce sales surged by 46 per cent during the first two years of the pandemic (2020-21), says Euromonitor, "though (sales) have since partially moderated," says the CBRE report.

We're shopping more online

This has been a worldwide phenomenon even before the pandemic, particularly among city dwellers. Global e-commerce sales are up 133 per cent since 2016. Of the top seven markets with the highest e-commerce penetration ratio, the UK comes in at number two (behind South Korea and just ahead of mainland China), according to Euromonitor, Forrester and CBRE Research. Meanwhile, Mintel forecasts that online retail sales will account for 30 per cent of all retail sales by 2025.⁷ The good news is that carbon emissions from online shopping are 36 per cent lower, on average than those produced by in-store trips, as reported by a study conducted by MIT for Prologis.⁸

Click and collect

As e-commerce increases, more stores are converting all or part of their space to 'click and collect' areas. That means more customer deliveries going to those stores.



Too many returns or “reverse logistics”

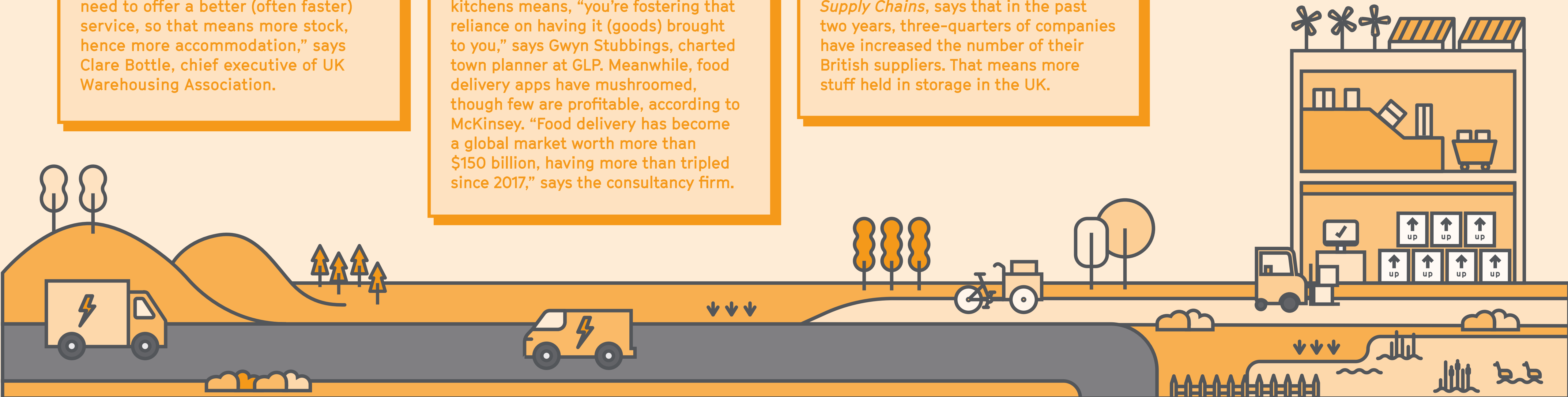
When we over-order or don't like what turns up, we send it back. Forrester and eMarketer say the level of e-commerce returns was 20 per cent in 2021, whereas the proportion of bricks and mortar returns was 8 per cent to 10 per cent. That's a massive headache for the retailer — returns take up space in a warehouse where the packaging and item inside must be checked before it goes on another onward journey. In short, “companies need a wider range of inventory, and need to offer a better (often faster) service, so that means more stock, hence more accommodation,” says Clare Bottle, chief executive of UK Warehousing Association.

No car parks, shrinking kitchens

Most new residential schemes in the capital are being built without car-parking, or the ability to apply for on-street parking permits. This is meant to reduce traffic congestion and air pollution. At the same time, kitchens are getting smaller. The average size of a kitchen in properties built in the 2020s is 13.44 sqm — kitchens have been shrinking decade on decade since the 1960s, when the average was 15.37 sqm, according to LABC Warranty. The combination of no car and small kitchens means, “you're fostering that reliance on having it (goods) brought to you,” says Gwyn Stubbings, chartered town planner at GLP. Meanwhile, food delivery apps have mushroomed, though few are profitable, according to McKinsey. “Food delivery has become a global market worth more than \$150 billion, having more than tripled since 2017,” says the consultancy firm.

From ‘offshoring’ to ‘reshoring’

Many British manufacturers are bringing production back to the UK, says the manufacturers' trade group, Make UK. They're doing that to try to deal with a global restructuring of the world's supply chain caused by multiple economic changes: the coronavirus pandemic, Brexit and the war in Ukraine. Offshore supply chains have been hit by delays in the arrival of parts and materials. The 2022 report by Make UK and Infor, *Operating Without Borders — Building Global Resilient Supply Chains*, says that in the past two years, three-quarters of companies have increased the number of their British suppliers. That means more stuff held in storage in the UK.



How can London deliver enough of the right sort of industrial space?

We are not alone — many global cities are short of space. According to Savills, there was a record take-up for logistics in 2021 in both Europe (where 38 million sqm of take-up was 28 per cent above the five-year average) and the US; while the average logistics vacancy rate has fallen to 3.5 per cent in Europe and 4.4 per cent in the US.

In the 1970s, London had plenty of industrial land, as manufacturers were moving out or shutting up shops. But London's vacancy rate for industrial land is now 2 per cent to 3 per cent, that's down from 16 per cent in 2001. In the London Borough of Ealing alone, there is a need for around 18ha of net additional B8 space by 2041. To support contemporary urban living, it is key to locate logistics in urban areas, closer to where people live, allowing for faster sustainable deliveries and creating job opportunities.

The London shortage is because so much of that industrial land has been released for other uses, mostly residential, and because of the pent-up demand for industrial space. In 2022 Centre for London reported that in the last 20 years, London has released

24 per cent of its industrial floorspace to other uses.⁹ Furthermore, almost 30 per cent of London's industrial land isn't protected by designation.

“Many local authorities have considered planning applications for logistics space based on out-of-date demand data and allocated space accordingly. We know that this data will hide suppressed demand and as a result, jobs and opportunities are going elsewhere.” says Adrienne Howells, senior development director at GLP, citing the BPF's report *The Logic of Logistics*.

Bridget Outtrim, director of Savills' Industrial and Logistics team says, “many residential developers are providing space in mixed use schemes which do not suit industrial occupiers”, meaning there's space for makers provided under Class E, but less space is being offered to B2 and B8 occupiers. At the same time, other business types like data centres, film studios and manufacturing also want to grow in London and are competing with logistics companies for the same space.

If we look at the manufacturing sector, for instance, Brompton foldable bicycles has been in London since it was founded in 1975, with its 350 staff producing 75,000 bikes a year. It wants to expand here, but the lack of bigger affordable space in the capital means it is moving to Ashford, Kent.

Ten-strong wire rope manufacturer Ormiston Wire is luckier. The sixth-generation business owns its Isleworth factory and other property, so it is not under pressure from high rents to move out and can bat away approaches from residential developers. But as “manufacturing sites are being purchased and developed for housing, this causes problems as we then don’t have a pool of experienced factory workers,” managing director Mark Ormiston explains in *Made In London: from workshops to factories*.

Gold- and silversmith Grant Macdonald London exports 90 per cent of its products but also benefits from its Borough address. “There is a network of artisans nearby to call on for skills like cutting, enamelling and embossing,” founder George Macdonald says in *Made in London* and it would be too costly for Tate & Lyle Sugars to relocate from its 50-acre Silvertown home, since 1876. In short and as a rule, only the people who are still here are those who need to be here, and are prepared to pay the price and as Mark Brearley, Old Kent Road-based manufacturer and Professor at London Metropolitan University, points



Brompton factory

out: “The industrial accommodation crisis is just one (particularly large) component of a city-wide shortage of non-residential space, as many use types lose out to housing in the fight for space.”

London is growing and more housing is needed. But if residential is being built, logistics needs to be expanded appropriately. According to research by Knight Frank, “for each £1 billion of online retail sales, a total of 1.36 million sq ft of warehouse space is required. Therefore, based on a hub and spoke model and at current capacity utilisation rates, each £1 billion requires around 320,000 sq ft of last-mile logistics space (or space in ‘spoke’ facilities).”¹⁰

Making space for industrial and logistics

Leaders in the sector continue to highlight the lack of a coherent plan across London to allocate enough of the right space to industrial and logistics, and its potential impact on the everyday life of Londoners.

“Some boroughs are racing towards annihilation of the overwhelming majority of their remaining industrial accommodation, and there is little sign of significant action to stop that, nor of much concern about consequences,” says Mark Brearley. “As a result, our city looks set to face big difficulties servicing itself, and will face particular problems responding to the

dramatic changes in logistics demand, the anticipated expansion of the building and utilities retrofit activity, and the increase in recycling, re-use and repair.”

“This pressure from logistics is also putting pressure on other industrial sectors, in particular smaller businesses, who are not able to compete with logistics,” says Francis Moss, principal regeneration officer of economic growth at Ealing Council. Turley director Catriona Fraser suggests that the Greater London Authority should encourage local planning authorities to understand the supply and demand in their local areas. “The GLA can’t do this for them nor be that prescriptive, because the type and quantity of logistics space are different in different boroughs, albeit they can set strategic London-wide targets.”

Some residential developers reclassify B8 as more user friendly use classes such as workshops and maker spaces. But housing and large industrial uses, should work together to support and service our homes.

Then there are the problems of infrastructure, in particular power supply (for lighting, electrical vehicles, temperature control and robotics). According to UKWA, fewer than 5 per cent of warehouses have photovoltaics partly because, “it can be prohibitively expensive to put electricity back into the Grid,” says Clare Bottle. But UKWA data also shows that the industrial and logistics sector alone could meet the

£1 bn

for each £1 billion of online retail sales, a total of

1.36 m

square foot of warehouse space is required

UK's 2025 carbon reduction targets if all available roof space was fitted with PV.

Additional problems linked to infrastructure have to do with the green energy needed to power not just the warehouses but also the electric fleets. This is an important aspect to strengthen e-commerce and the logistics supporting it, which offers a sustainable solution to distribution. Research by Prologis shows that consolidating deliveries on a 'circular route' means less energy consumption and reduces transportation-related emissions by almost 90 per cent, with a full standard van replacing more than 100 individual car trips.

Last-mile parcel hubs are increasingly needed too. With so many empty units on our high streets (vacancy rates across Great Britain are 14 per cent, according to the British Retail Consortium), we need to expand on the innovative solutions that are already in action to accommodate hubs in town centres and high streets across London.



Chapelle International, Sogaris, Paris

The view from Greater London Authority

Q&A with Jörn Peters MRTPI, principal strategic planner, London Plan & Growth Strategies Team, Greater London Authority

How much extra land and premises is needed in London in the coming years to accommodate the Industrial and Logistics sector?

Our *London Industrial Land Demand Study* sets out the demand for different sectors including warehousing and logistics (chapter 7), but that is from 2017 and we will procure an update this year. Our emerging London Industrial Supply Study may give an indication of demand pressure through very low vacancy rates — we expect to publish the study's full findings in March 2023. The supply study may also at least mention the significant growth in demand for big box distribution stock fuelled by changing consumer habits and the growth of e-commerce in particular in key locations with good access to the strategic road network. There is also a growing market for non-traditional B-class uses such as film/TV production as well as smaller final mile distribution space.

How does the GLA ensure that enough of the right accommodation in the right locations is available for industrial and logistics?

We promote the protection of existing industrial land and Strategic Industrial Locations (SIL) in particular as primary source of suitable land. The London Plan requires Local Plans to meet their own identified need for industrial land (Policy E4). The London Plan promotes strategic intensification, co-location and substitution (Policy E7). We will be supporting the delivery of industrial capacity through investment in example schemes and the preparation of London Plan Guidance (LPG) — consultation on this expected to be in summer 2023.. We are working with relevant sectors and boroughs, for example through the Industrial & Logistics Sounding Board (ILSB). A good understanding of the network/pattern of sustainable logistics operations with increasingly electric fleets from micro-hubs to larger distribution is essential and collaboration with authorities outside London could potentially be beneficial. There might also be scope to convert under-used retail space with good access to the road network. The Mayor does not support the use of greenfield or Green Belt land for industrial uses.

How can developers be stopped from replacing so much B8 with residential C2?

We are working with boroughs to ensure there are robust Local Plan policies that protect sufficient industrial land. We challenge boroughs to ensure they demonstrate they can meet their need for the different types of industrial use including B8. We seek to ensure commitment in Local Plans that loss of SIL in particular, e.g. as part of the consolidation, is re-provided in advance, ideally through a strategic masterplan approach to avoid piecemeal development. We consider close collaboration with existing landowners as essential. We seek to ensure that schemes referred to the Mayor that propose loss of designated industrial land (including B8) and do not accord with Local Plan policy are refused.

Many schemes that have planning permission are 'co-location' schemes. And yet many people don't believe that mixing resi with logistics activities can work. What's your view?

This will be explored as part of the preparation of the LPG. Initial work is already underway to identify standard requirements, as it is most important that industrial units can operate properly. Industrial developers need to be involved (alongside housing developers) to ensure that their industrial requirements are recognised first and designed into developments from the start. Industrial units need to be flexible and able to accommodate a range of industrial users. Vertical co-location in particular may not be suitable for range of industrial uses. Separation of residential and industrial access routes as well as active frontages are among the key design challenges. A workstream of the ILSB is specifically looking into this, including drivers, design and viability issues. Land values for B8 has been increasing in many parts of London potentially reducing the need for cross subsidy.

When space is short, what's the answer?

Here we look at some options for thinking about alternative uses of space that can tackle the lack of land for industrial and logistics.

① *Co-location*

Co-location involves siting logistics and industrial activities below or alongside other uses. Turley has been monitoring this since the policy came through in the London Plan. “Not many of these schemes have come through on the ground, so that’s why it’s heavily debated. There are schemes that have or are currently being built but they’re predominantly horizontal (beds alongside sheds). I was surprised that 81 per cent of the schemes that we reviewed [GLA referable schemes since December 2019] have an element of vertically stacked or co-located uses. That was an interesting statistic given the scepticism in the market around whether vertically stacked co-location can work, albeit we would support strategic targets to be set”, explains Catriona Fraser.

Her conclusion is that B8 is what’s needed (in the current market), but the schemes are seeing an uplift in Class E and a decrease in B8. “From our point of view, it is working in planning policy, but it isn’t matching market demand. We need the market to

mature, and understand how these schemes are going to work in reality, especially with more of the B2 and B8 uses — developers and investors need confidence that this works operationally.”

However, co-location schemes are proving challenging, suggests Bridget Outtrim. Some planning applications may satisfy the square footage requirement for re-provision policy, but these spaces might not always be fit for industrial uses.

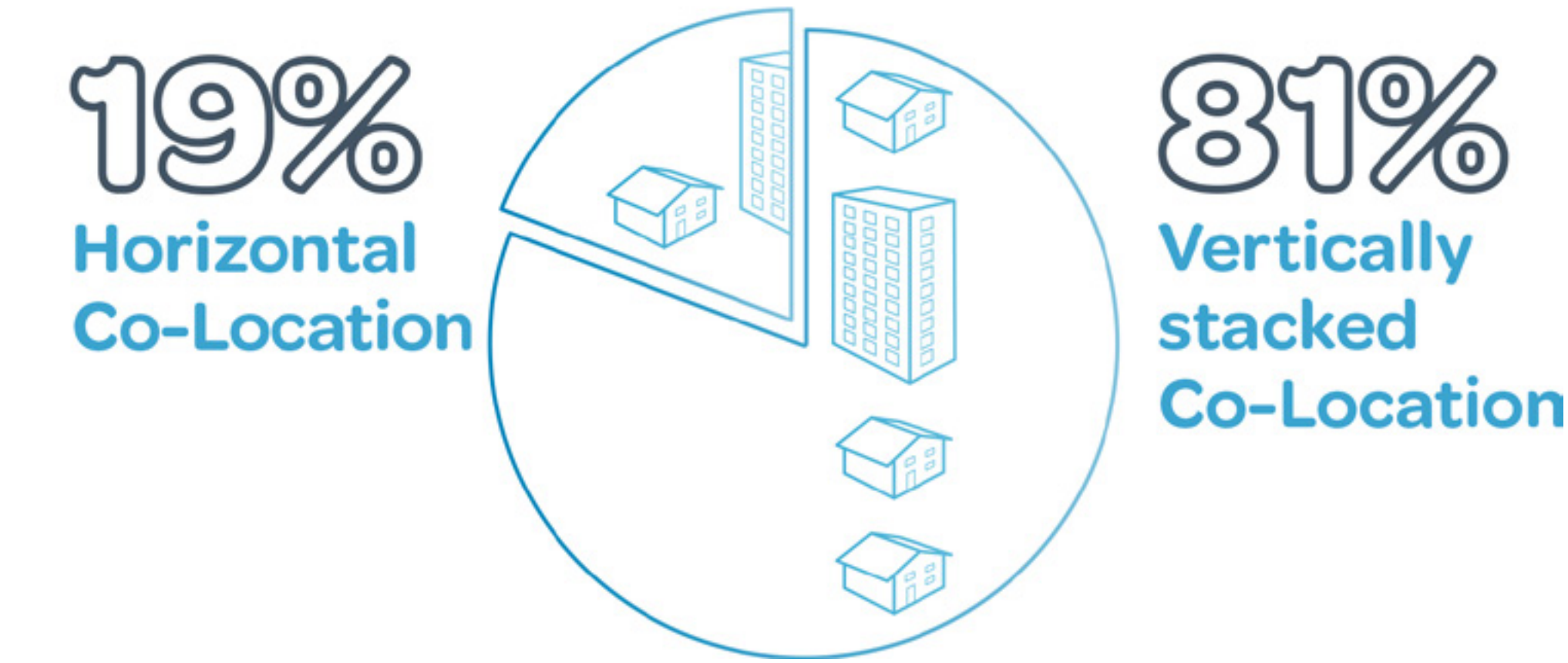
But Gwyn Stubbings believes such schemes could have a future. “If we roll the clock forward, and those sites are using quieter, cleaner electric vehicles, that relationship with residential above or next door would be OK. So planners should be thinking ahead, because the emissions will reduce over time.”

② *Intensification*

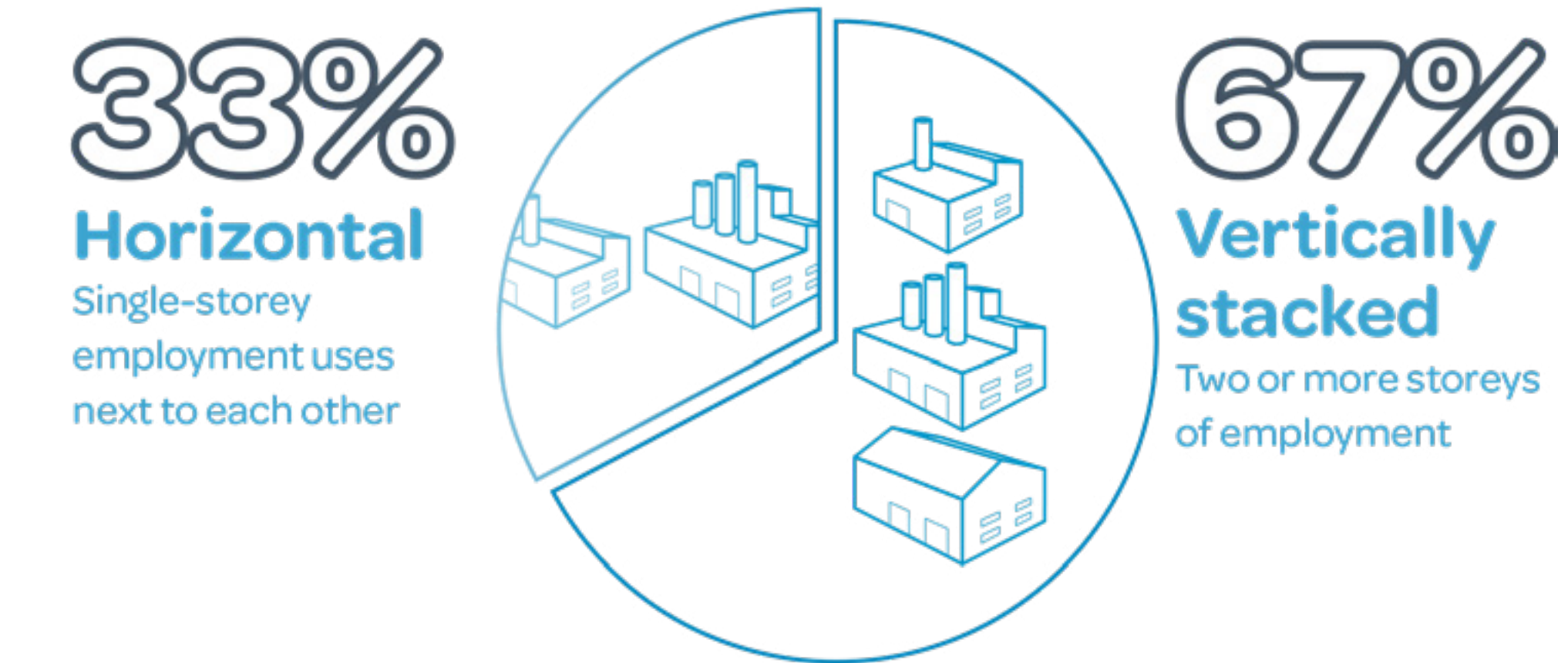
Another option is to focus on intensified, single-sector sites with multiple logistics occupiers. Intensification often involves building up. That increases the cost of build, but the higher the floor, the lower the rent. Multi-level buildings usually require installing costly lifts or spacehungry ramps, but conveyor belts and shoots are also an option. One key consideration

Vertical or horizontal Co-Location

Proportion of schemes coming forward as vertically stacked or horizontal Co-Location (approved and submitted):



Co-Location schemes featuring stacked employment uses



- GLA Stage 1
- GLA Stage 2
- Approved



"Co-Location in London: Is it still stacking up?", Turley, February 2023 © Turley

when developing multi-storey developments is the use of lifts or shoots to get goods between levels. In simplistic terms, an operator based on the higher floor of such a development could easily come unstuck if such systems were to fail.

Prologis has been building multi-level logistics warehouses in Japan for over a decade. The Prologis Park Osaka, for instance, is a 130,500 sqm logistics facility that has many sustainable design features and is 8 stories. Seismic isolation technology keeps the facility safe during earthquakes. Its central location provides last-touch distribution and regional distribution in the Greater Osaka Market, making the warehouse ideal for logistics activities. An onsite convenience store and restaurant improve the quality of life for customers and local residents.

In Barking and Dagenham, Haworth Tompkins has designed “INDUSTRIA”, a community of light industrial units and maker spaces within a modern, sustainable, multistorey building capable of adapting to future needs.

③ *Re-use of existing buildings*

There is a great opportunity to repurpose a whole range of underused spaces, from retail parks to car parks. Savills suggests that parcel companies could



Top: Prologis Park Osaka | Bottom: Industria

locate facilities in retail parks to service the last mile. “Out of town retail park units have the most potential for conversion to urban logistics units due to the similarity of design but also proximity to suburban populations.” However, there are some key considerations when repurposing these uses in particular around “the amount of loading doors that are available, the height of the unit with 8m being desirable, the size of any yard, traffic restrictions and also any hours of use restrictions.”¹¹

Prologis recently completed a conversion of a 118,000 sq ft cash and carry unit into a last-mile facility in Croydon for an e-commerce customer. The work included modifying the rear dock face, reinforcing the yard's floor and refurbishing the unit's envelope. “Ultimately the transformation was fantastic with the site's fundamentals — a large unit, yard and location — well meeting our customer's need. I would anticipate more projects of this nature in the capital” says Robin Woodbridge, Senior Vice President and Head of Capital Deployment UK, Prologis.

④ *Last-mile parcel hubs/depots*

Considering deliveries of stock and supplies to shops and restaurants, without logistics, there would be no high streets. Equally, the high street is playing a direct role in modern-day logistics. “It’s time to have

an honest conversation about the fact that we’ve had too much retail on high streets for years,” says Bridget Outtrim. As NLA covered in the 2021 report *Local London: building resilient neighbourhoods*, we need to rethink the size, composition and mix of uses in our high streets and town centres — and spaces for industrial and logistics, from food production to collection points, could offer a vibrant offer that reactivates our high streets.

Smaller, centrally located units are often suitable for ultra-fast grocery offerings like Getir and Gorillas. But their ‘dark store’ presence — mopeds on the pavement, little street-facing activity — can be seen as a blot on the high street. Some are trying to change that image.

Deliveroo has opened HOP on New Oxford Street, the brand’s first physical store in the UK. Customers can shop in-store by ordering through digital kiosks; ordering via the Deliveroo app for collection at the store; and for delivery within minutes to local residents, offices and other addresses via Deliveroo riders. HOP offers over 1,750 grocery items, “with Deliveroo’s site team picking and packing the orders, ready for collection or delivery in minutes”, according to the brand.

And this summer, Gorillas opened a coffee shop in its ‘dark store’ in Hampstead. There, customers can click and collect orders made on the app, rather than having

them couriered to them. The coffee shop is operated by the social enterprise Change Please and is staffed by homeless people who are paid the London living wage and are trained as baristas. All profits from the shop's sales go back to charity.

Last-mile operators are also eyeing up small units elsewhere. Turley, for instance, has submitted a planning application on behalf of The Arch Company, which will bring 29 empty railway arches in the Old Kent Road area back to life for industrial logistics operators. "It's about thinking more creatively from a council's point of view where these types of operators need space, which the London Borough of Southwark is doing," says Catriona Fraser.

"Because fewer people are driving into town, car parks lend themselves to hosting last-mile hubs," says Gwyn Stubbings. In 2020, the City of London Corporation announced its first last-mile logistics hub, by converting 39 car parking spaces in the underutilised London Wall Car Park into a hub for Amazon Logistics. The final leg of parcel deliveries will be undertaken by e-cargo bikes and people on foot. In 2021, British Land bought Finsbury Square Car Park for £20m. Close to their Broadgate campus, the underground car park "provides an excellent opportunity to create a last-mile logistics hub in the City of London where supply for last-mile logistics is highly constrained", says British Land.



Ryde and Port's last mile hub in Q-Park Leicester Square

In Ealing, Ocado is trialling a small last-mile distribution hub trial in the South Acton Industrial Estate. Meanwhile, Ealing Council is developing new local plan policies and a workspace delivery strategy to intensify industrial workspace and meet the needs of diverse businesses, says Francis Moss.

5 Land designation rethink

The chronic loss of industrial land means there's growing pressure to think outside the box. "Large vacant sites are few and far between," says Gwyn Stubbings. A large site in London can be a mere 10 acres, whereas in the Midlands it could be 100 acres. Robin Woodbridge suggests assembling the right size and shape of sites in the city through tactical purchases of office or retail space with the ambition to repurpose it in the future.

Thinking of other possible alternatives, some have called for a review of the Green Belt, releasing some poor quality land that permeates into industrial areas, while enhancing other areas. Bridget Outtrim adds: "People have a rose tinted view of the Green Belt. There's a lot of Green Belt that isn't particularly valuable and has already been previously developed within the M25, which could help the emerging logistics crisis."

Rethinking the Green Belt is not supported by the Mayor, and as is stated in the London Plan, "the Mayor strongly supports the continued protection of London's Green Belt" and "will work with boroughs and other strategic partners to enhance access to the Green Belt and to improve the quality of these areas in ways that are appropriate within the Green Belt."

One idea to regenerate disused farmland in the Green Belt sits right next to Heathrow Airport. Rectory Farm is a scheme for an underground warehouse in Hounslow. It is described as "an important solution to Hounslow's need to meet the requirement for high-quality aggregate for purposes of infrastructure." Following the excavation beneath the park, a concrete basement structure will be built to create 180,000 sqm of underground space. Planning permission was granted in 2019, but there is no timeline for the development. The masterplan architect is now Aukett Swanke.

There are also other spaces across London that could do with a rethink. Brearley says that London needs a "modest" 500 hectares of industrial land, equivalent to "a handful of golf courses". There are 131 golf courses within Greater London (43 of them publicly-owned) covering 4,500 hectares, according to Ordnance Survey's Greenspace dataset. "Someone has to start making those decisions. There has to be a revaluation of what's seen as important because we've let too much industrial space go."

How can we rethink the logistics network?

When it comes to the impact on London's streetscape, the logistics operators are thinking carefully about their fleets and routes and working together with planners to conceive logistics networks hand in hand with placemaking. Intensification of use creates more congestion, but sustainable modes of transport and deliveries from urban fulfilment centres close to customers can be a powerful lever to further decrease emissions. But as conscious customers, we must also rethink our relationship with e-commerce and deliveries.

“You need to think of it as a city-wide issue,” Tom Alexander says of the routes, “because one logistics operator might need five to 10 buildings, but what about the transport between them?” For him, it's about more than mere asphalt. “It's important to understand the choreography of the whole network: the river, the rail networks, as well as the HGV's, the new generations of green vans, the cargo cycles, scooters and even ‘walk’ deliveries by the Royal Mail.”

The sector is working hard towards electrifying its fleets. But electric vehicles need EV charging points.

Electric vans and bikes need to be charged up, many of them overnight, so an industrial site will need space for them, as well as car parking for staff who drive to work at special hours when public transport isn't always an option.

Another way of looking at it is to focus on the vehicle size, not the building. “In the Far East, they have smaller commercial vehicles, which travel into tighter urban locations,” says Bridget Outtrim, “that might also happen in London, particularly if it is policy-led. It's easier to adapt your fleet than change buildings.”

Companies such as Co-op are starting to roll out ‘walking deliveries’ with staff delivering online orders to customer homes on foot. And in 2021 Ocado launched Zoom, which uses electric refrigerated vans, refrigerated EAVs (electrically assisted vehicles) and pedal-powered cargo bikes. More orders delivered per trip and more drop-offs during the same journey result in more efficient deliveries and fewer vehicles on our roads. Every delivery made in these new vehicles is zero-emitting and replaces the need for the use of conventional ICE (Internal Combustion Engine) vehicles.



In 2021 Ocado launched Zoom, which uses electric refrigerated vans for deliveries.

Doorstep solutions

“The most costly part of the delivery is the drop-off to the home,” says Robin Woodbridge. The appetite for consolidation pick-up points is growing among operators, and also among consumers. As more people are in less, home delivery might fall out of favour.

Some large buildings such as student residences and offices have their own last-mile solutions which are intended to reduce last-mile traffic. 22 Bishopsgate’s offsite ‘consolidation centre’ manages all business and personal deliveries. These packages are delivered to the building twice a day, in two large drops rather than hundreds of small ones. This has reduced its delivery emissions by 96 per cent, according to the company.

Property investment and development business Quintain is looking to set up something similar at its 85-acre Wembley Park scheme. Due to complete in 2027, it will be home to around 20,000 people — the UK’s biggest single site of Build to Rent units. The developer estimates that the 8,400 households will generate 1,214 deliveries a day.



22 Bishopsgate’s offsite ‘consolidation centre’ manages all business and personal deliveries.

Can logistics be a good neighbour and employer?

Spaces for industrial and logistics are often seen as being in conflict with other uses. Residents often do not fancy distribution centres as neighbours, and so local authorities struggle to accommodate them. “Logistics’ image is not helped by the fact that schools don’t teach about the subject”, says Clare Bottle. The “Generation Logistics” campaign launched by Logistics UK and CILT (UK) with support from the Department for Trade to teach about logistics, is long overdue in her mind.

But how much of these tensions and perceptions are based on misconceptions? And what role can the sector play in terms of sustainability, job opportunities and innovation? The Frontier Economics report, *The Impact of Logistics Sites in the UK*, shows that logistics jobs pay as well or better than other jobs in the same occupational categories. It also says logistics provide routes to management jobs for people who did not complete higher education, as 63 per cent of logistics managers don’t have a university degree. The logistics industry employed 1.25m people in 2021, 4.1 per cent of the UK total workforce, and when compared to other key

sectors — manufacturing accounts for 8.7 per cent of all UK jobs and construction for 6.6 per cent — it reveals the importance of the logistics industry as a major employer.¹²

Employment in logistics has nearly doubled since 2012, and according to Prologis’ research, per square metre, there are more people working in a B8 unit than in a B2 unit. The number of driver jobs is static, but there is growth in engineering jobs. There are also exciting opportunities in coding, mapping out routes for goods, and robotics.

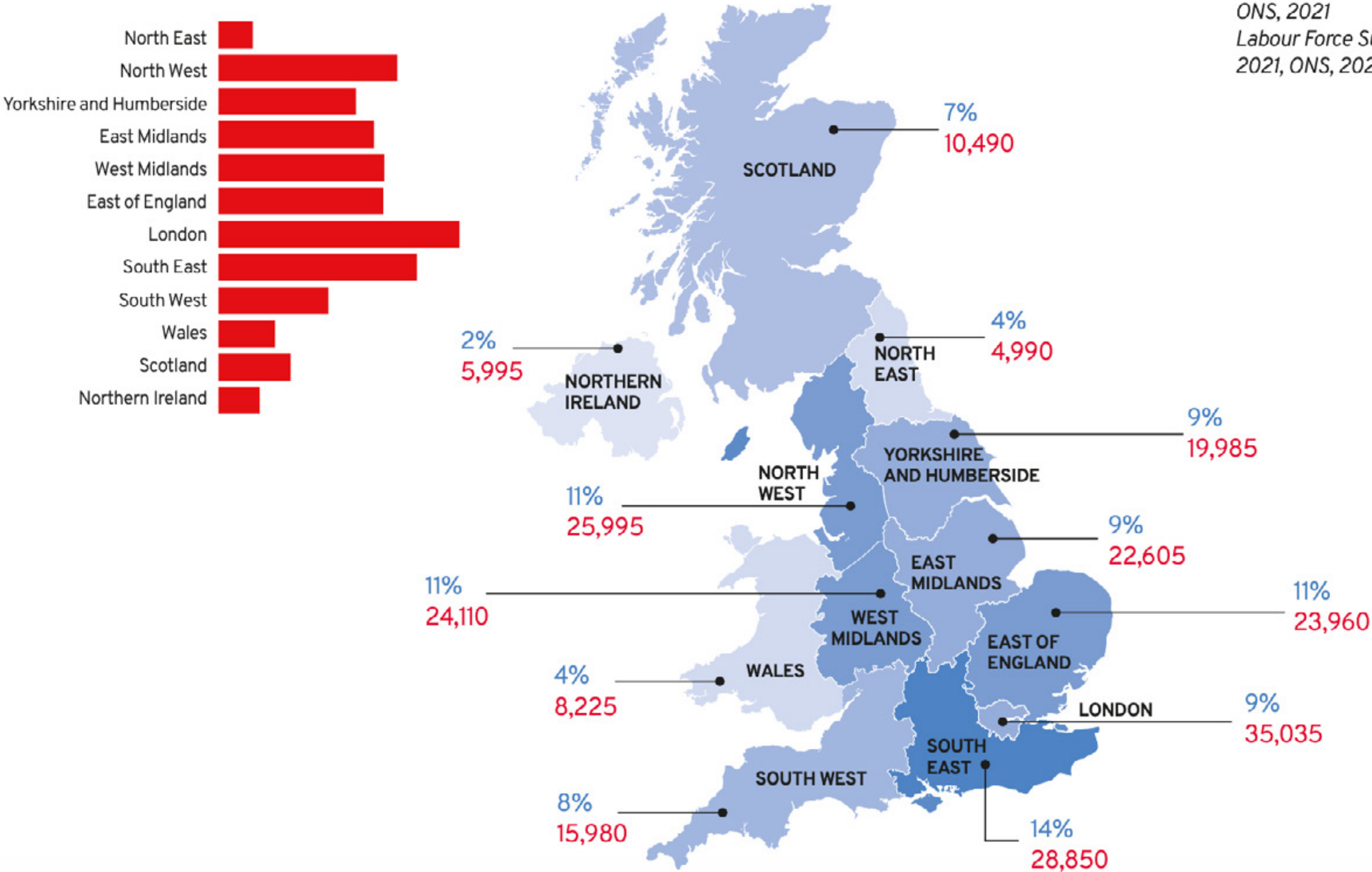
In 2018, Prologis UK became the first property company in the UK to require its supply chain to adhere to a Social Value Charter, delivering social, economic and environmental benefits to communities. By way of example, during the construction of Jaguar Land Rover’s new Logistics Operations Centre, £11.1 million was spent on the provision of work experience and training opportunities to support the uptake of construction skills. Similarly, the Prologis Warehousing & Logistics Training Programme (PWLTP) is aimed at training those leaving education and re-skilling the

Logistics employees and number of enterprises

Proportion of logistics employees (percentage)

Number of enterprises (thousands)

Sources: UK Business:
Activity, Size and Location,
ONS, 2021
Labour Force Survey, Q4
2021, ONS, 2022



Source: UK Business Activity, Size and Location, ONS, 2021 | Labour force survey, Q4, 2021, ONS, 2022 in “The Logistics Report 2022” by Logistics UK

unemployed, equipping them with the knowledge to pursue a career in logistics and generated over £13 million in social value to date.

And in October 2022 GLP launched the Centre of Logistics Education & Research (CLEAR) at Magna Park Lutterworth. The research, innovation, education, and training facility provides skills, training and professional development at all levels across the spectrum of logistics and supply chain roles, creating training pathways of progression for new entrants and established talent alike.

Welcoming workplaces

“We want to work in partnership with business and landowners to better integrate our industrial sites within their context and maximise opportunities to improve access and public realm connections to secure wider benefits for local people,” says Patrick Shannon, masterplan project manager at the London Borough of Waltham Forest. But developers and operators claim that it’s a tricky sector to place-make really well because of the scale.

This is a challenge that architects can rise to. Innovative designs include more green space around buildings and views into and out of them. For Hugo Braddick, associate director at Haworth Tompkins



Centre of Logistics Education & Research (CLEAR) at Magna Park Lutterworth.

Architects, “stacked multi-level schemes offer more opportunities to provide high quality shared amenity and create inspiring architecture.”

Tom Alexander expects these buildings to be around for 100 years, “so they have to be big, sizable and agile open volumes, well daylit, passively vented, thermally comfortable, with very strong floors and embracing biodiversity, so they’re potentially very friendly parts of the city. We’re talking about the intensification of the city to provide all this stuff in small spaces — future-proofed enclosures, a structural frame like a chassis on a car that can adapt for future owners and uses.” Certainly, a big volume has lots of space for green roofs and walls. “The biodiversity opportunities are immense because these are big buildings with gentle roofs and long walls ideal for planting, they can also share heat and power (back to the grid and for other local buildings) if you’re clever with it,” Tom Alexander adds.

For employees, their workplace should be welcoming. It should be enhanced with walkways and running tracks outside, and once inside, fresh air, natural light and break-out spaces should be a prerequisite.

It is also about the employees’ journey to and from work and being able to get there easily and sustainably. So it helps if there’s pavement for those on foot. Similar to other sectors, logistics companies are also looking at employee wellbeing.

Amy Gilham, director, economics at Turley, thinks “that the environmental, social, and governance (ESG) element will come to the fore. People are aware of the quality of life and the importance of place. Those developers which put people first will be the ones that will be noticed and will be industry leaders. I see a real opportunity here — how different developers, architects and planning consultancies work with local authorities to understand the needs of people. It’s about having to innovate, it’s not just about bricks and mortar.”

International solutions

Here we present examples from three global cities rethinking the way industrial and logistics can provide innovative solutions to the needs of their communities.

① *Paris*

Small mixed-use developments used for delivery logistics have been popping up in residential quarters of the French capital since 2012. The most high-profile is Chapelle International, which opened in 2018. It's based atop an abandoned railway in the 18th arrondissement in the north of the city. As well as parcel handling, the three-storey, 484,000 sq ft mixed-use development houses a data centre, offices, sports facilities like tennis courts, and an urban farm. It was developed by the French firm Sogaris, which is owned by the city of Paris but is operated as a private company. "In the Paris Plan, they treat logistics as social infrastructure, they understand that the more people and homes you have, the more logistics you need," says Amy Gilham, "they're part of the urban fabric, making them something positive."



Paris Chapelle International 2020, Sogaris, Paris

② New York

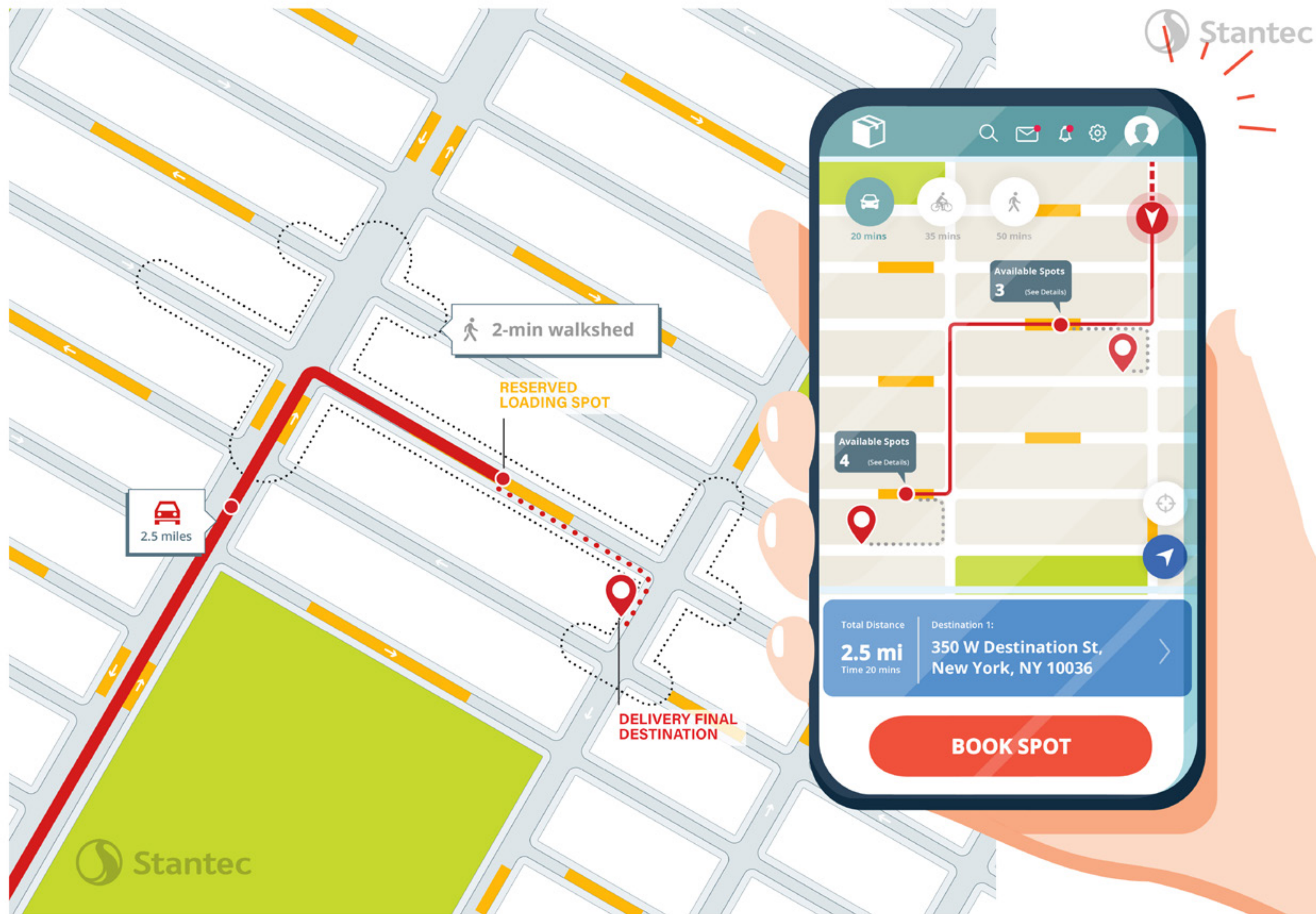
Each year, 365 million tons of freight move through New York City, and that number is expected to increase 68 per cent by 2045. Recent shifts in consumption and expectations for when and where goods should be delivered have accelerated the growth of urban freight ecosystems with real implications for cities. In 2020, the AIANY's Transportation and Infrastructure Committee formed a working group to examine issues and opportunities related to the increasing impacts that result from goods movement in New York. In collaboration with Stantec, the group engaged in research, held listening sessions and interviews with a wide range of stakeholders, and worked with experts to develop a holistic set of policy and design recommendations for balancing goods movement and neighborhood needs to create more livable communities.

The operations and facilities that support goods movement affect a wide range of stakeholders, including communities, industry, and government, as well as those in professional practice whose design work focuses on urban freight and the public right of way. As a conceptual framing tool for Stantec's work, they defined the "Interface" between movement and place as an important opportunity for design intervention. In the case of last-mile or final-fifty-foot deliveries, the Interface consists of streets,

curbs, sidewalks, doorsteps, and buildings. They used this concept to develop policy and design recommendations for the city, including themes of circular economy, freight consolidation, and sustainable delivery modes.

The Interface concept also begins to convey the complexity of developing strategies for managing freight, as it is influenced, designed, maintained, and governed by a wide range of entities. As a result, components of the Interface are mostly considered independently, but Stantec's work posits that it is an understanding of the entire sequence of goods movement that will elucidate the full range of externalities and the strategies that could mitigate them.

"Freight is public transportation. It is a utility that every single person impacts. And the more people that understand this, the better. Which is why I'm really excited to see architects examine how zoning, land use and building design can help improve last mile delivery as it brings a critical and often missing viewpoint to this issue." said Sandra Rothbard, AICP, Founder and Principal, Freight Matters.



Stantec provides an understanding of the entire sequence of goods movement.

3 Tokyo

In April 2017, Prologis delivered Prologis Park Koga 2, a two-story, 19,699 sqm build-to-suit facility for logistics solutions provider Hitachi Finenext Transport System. The Koga 2 facility is the sixth build-to-suit project that Prologis has developed for the Hitachi Transport System Group. It serves as a strategic base for the 3PL to expand its operations. The repeat customer wanted to consolidate two distribution centres in the area and Prologis provided a solution that worked for their time, location and specification requirements.

Prologis Park Koga is in Koga city in Ibaraki prefecture in the Tokyo market. It comprises three projects, Koga 1, Koga 2 and Koga 3, all leased. Koga 1, to the Suzuken Group; Koga 2 to Hitachi Finenext Transport System; and Koga 3 to Senko. All three are repeat build-to-suit customers. The location offers excellent access to Tohoku Expressway through the Ken-O Expressway, which opened in March 2016. With its strategic location, Prologis Park Koga is a distribution hub covering not only the entire Greater Tokyo area but the Tohoku and Kansai areas as well.



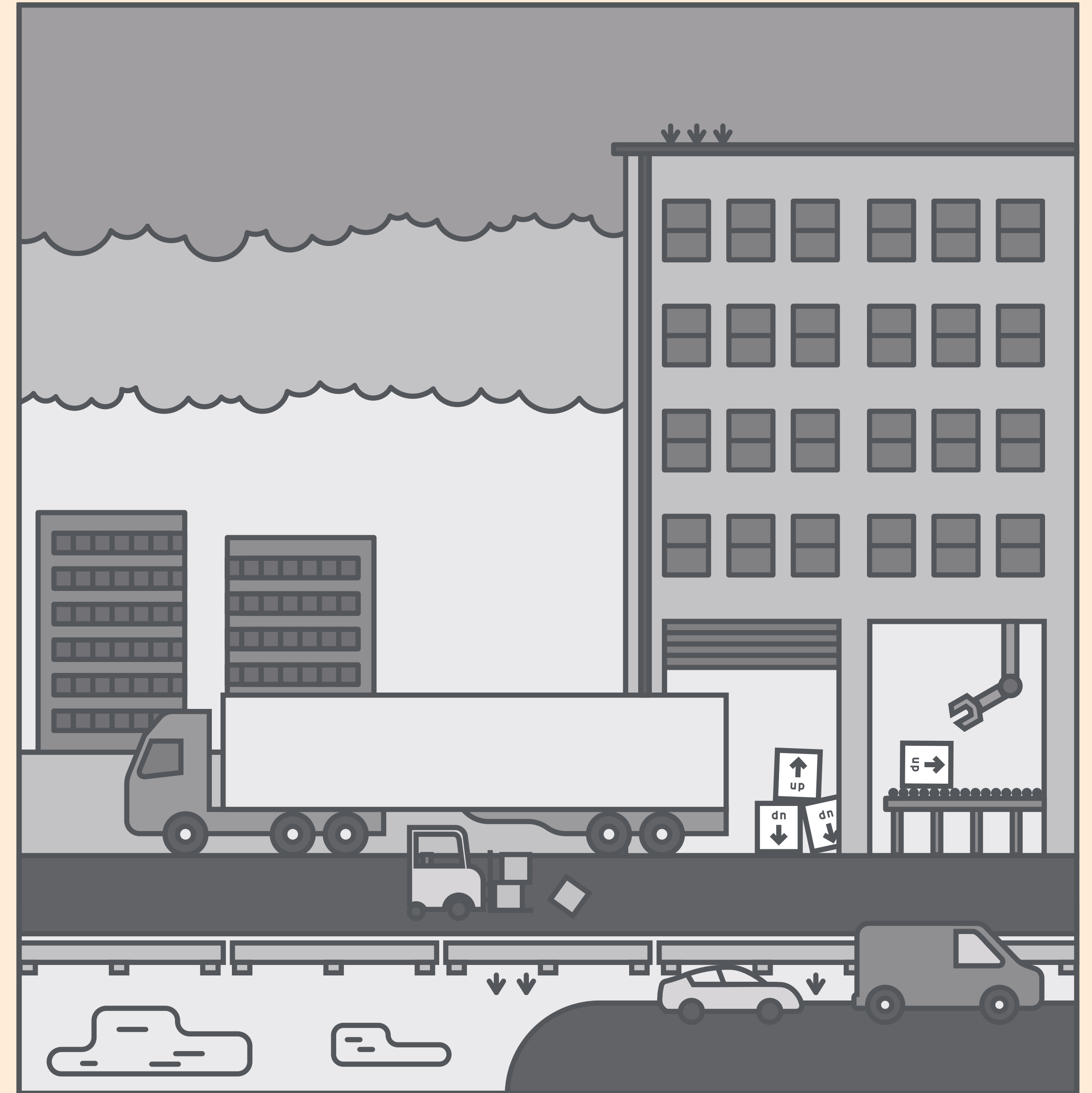
Prologis Park Koga in Tokyo

Testing scenarios

Having established the current challenges in the industrial and logistics sector in London, it is necessary to also look further into the future to understand the full risks and possibilities for the capital and its growing population. Here we present ‘dream’ and ‘nightmare’ scenarios that not only illuminate possible outcomes but also can be used to infer how policymaking and design should respond to meet broader societal and urbanistic needs.

It's a logistical nightmare

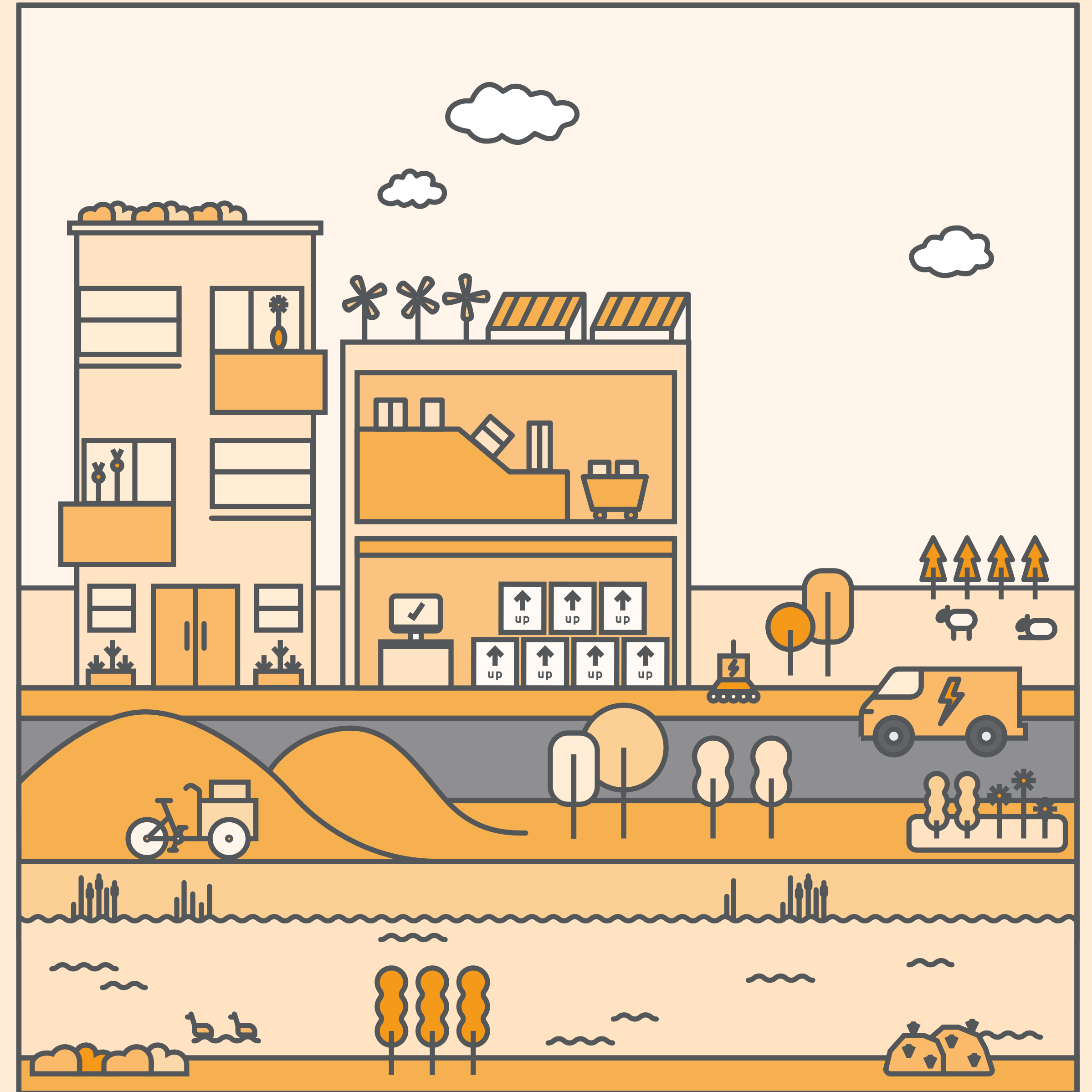
Windowless bland sheds on remote industrial parks are visited day and night by gas-guzzling HGVs. These vehicles and unbranded vans clog up the surrounding roads. At the same time, people keep driving their private cars to far-off retail parks instead of walking to their local high streets. Without a last-mile strategy, deliveries are not efficient and sustainable, and job opportunities are missed. Back in the depot, inside these artificially-lit boxes, a handful of despondent staff wander about while robotic arms pick and pack. Above are floors of cramped family homes. With no access to green space or even pavements, children play on unsafe streets, dodging articulated lorries. Unsatisfied customers are waiting at home for lost parcels in a logistics breakdown.



Logistics in our dreams

Land is made available within the M25 and beyond for sustainable, thoughtfully-designed multi-storey warehouses. Here, a number of businesses' goods arrive in silent e-vehicles. The buildings have reliable means of moving products from bottom to top and back again, and loads of room for big e-vehicles to manoeuvre. Trees, flowerbeds, lawns and brooks are dotted around and within the site, with running tracks for staff and pavements for those who walk to work or passers-by. The building has floor-to-ceiling windows, luscious green walls and roof. Its solar panels generate their own electricity and give back to the National Grid.

For onward journeys to smaller, local distribution hubs, goods are carried along the river or underground tunnels. These central hubs are located in former retail parks, whose outsized stores have been redeveloped with state-of-the-art distribution centres. Struggling retail units have moved back into large empty sites on high streets. Smaller vacant lots on high streets are filled with bustling 'last-mile' collection points, and by bright and welcoming 'quick-commerce' operators, reviving our high streets. Happy customers living in the proximity walk to pick up their parcels.



Intensification, environment and network

by Tom Alexander, Director, Aukett Swanke

A multitech evolution:

The industrial sector could do with a new name for some of its refreshed new habitats. We're searching for the first and developing the second. This vibrant and critical part of London's eco system is surging and looking for space and understanding.

In Latin "industria" means diligence and work, then from 15th century French "industriel" covers "cleverness, skill, activity, experience and zeal", all perfect words for the vast variety of operations and creativity that goes on inside a shed, possibly another new name needed except that this humble term for such a versatile enclosure tends to prevail. Aukett Swanke's working title for the sector is Multitech, for comment, collecting the current and future range of uses and volumes.

A common perception captured in Lowry's paintings of the smoky industrial landscape is not a reflection of the current sector, especially in shared urban locations. There is a lot going on inside the large often blank facades, so some secure visibility in and out could create a connection between the local community and



the occupants, vital to blending them together across the public realm, literal windows on work.

New London Architecture's Industrial and Logistics Expert Panel, which I chair, is debating and building propositions for this perception along with a range of other issues, three of them highlighted below.

Intensification:

The search for space in a city starts firstly with the need to be retaining and enhancing existing industrial environments and their employment benefits and then provide for the new tech industries, particularly logistics.

Secondly, there is an increasing exploration of the capacity of sites to add more of the same uses to schemes with stacked floors up to six or seven high, a Multitech intensification of the standard B2, B8 and the new E Class.

Thirdly the search is now well established for integrating Multitech with other uses, such as residential, workplace, education, recreation spaces and recently life sciences, known as co-location. Placemaking and the neighbourly sharing of space and amenities are essential to enrich and blend such mixed communities.

This demand is increasingly energising logistics groups

to look at innovative but largely uncompromised new or existing volumes across the city.

Stacked schemes are being pursued by investors, developers and tenants including GLP, Prologis and SEGRO with a passionate debate around the best way to get goods and/or trucks up to the levels above ground, being either ramps or lifts. Aukett Swanke is looking at both in schemes that rise up to four or five levels, heavier operations at the ground and first, lighter above. The answer will be informed by the market and keen eyes are trained on the pioneers.

The natural and sustainable agility of a shed can be further enhanced on a stacked scheme by designing a chassis for the volumes that can work for the largest scale operations such as logistics and the smallest craft activities. Time, the city's ever-changing patterns and our growing demands will also require these new biosphere volumes to be able to transform their uses over a long period, the 100-year chassis being our target.

Environment:

This leads to the potential environmental, biodiversity and wellbeing opportunities Multitechs can offer to the city and its people. These incredibly critical drivers for all buildings, apply equally to these Multitechs with their large, column free, agile and robust enclosures.



The strong ground floor slabs are made for multiple robust uses but also offer a heat moderating thermal mass. Their large flexible volumes with airflow and daylight support wellbeing. The large roofs enable a mix of biodiversity, PV's and skylight, and the long facades' have the potential to contribute with green walls and interactive frontages.

Network:

At the urban design scale, the industrial and logistics sector operates as a 24/7 life force as part of the organism that is a city, a huge and ever evolving one in London. The Multitech operations are more than the plots they sit on, needing connections to them, between them and out to all the people ordering products online.

The networks for people to flow in and around London are generally well catered for and improving with additions like the Elizabeth Line and enhanced river services but goods also need healthy and safe strategies to match.

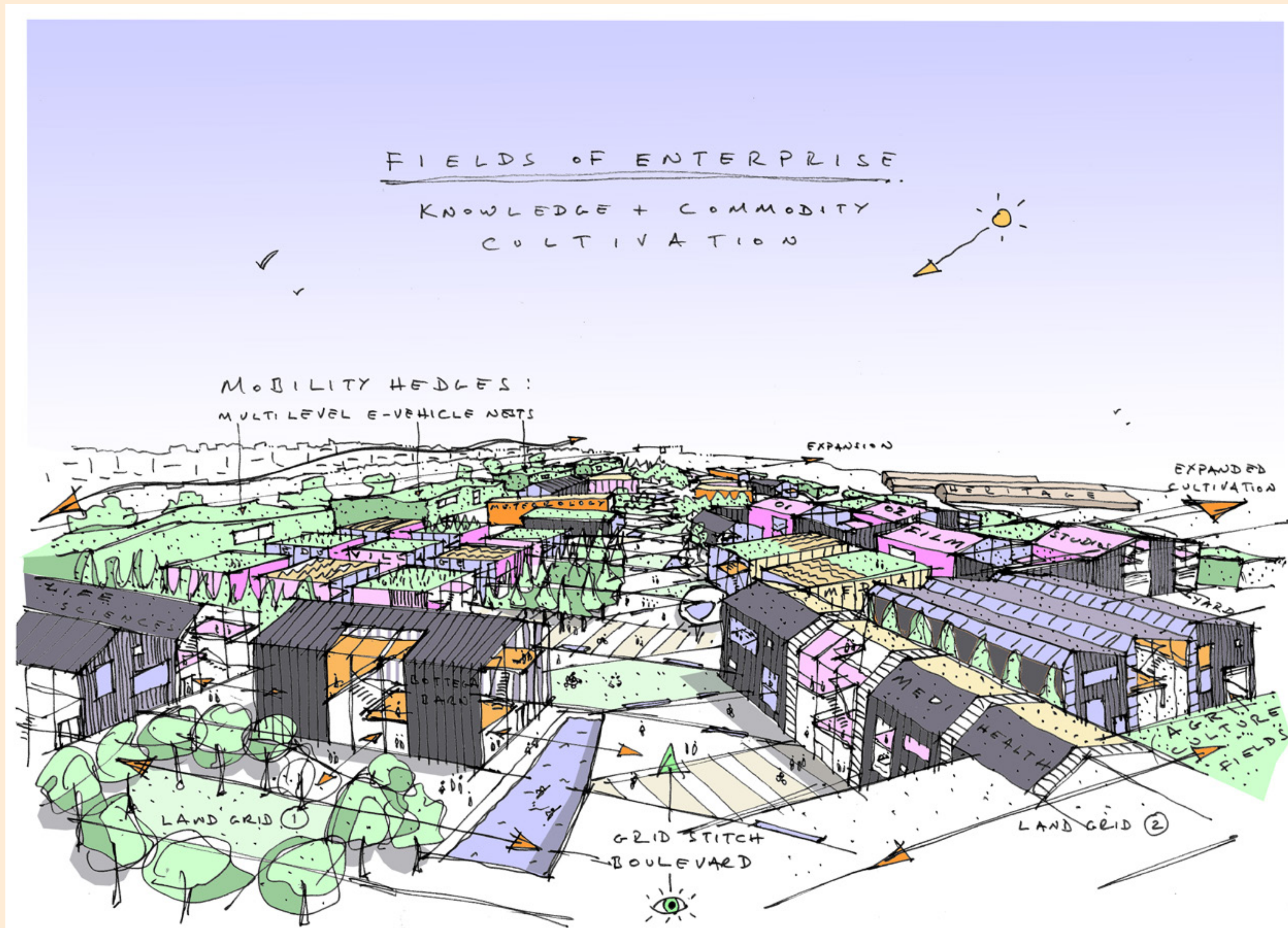
This intertwined network needs a collective analysis of its existing choreography and an enlightened exploration for its future. E Mobility suggests a positive approach to balance people walking and the growing wheeled community, from scooters to HGV.

In summary the new intensified stacked or co-located Multitech designs can be created with clever compositions and protection between differing activities, but transforming existing structures with their embodied carbon, such as car parks and retail shells also has potential.

Getting the blend right for living, working and industrial services in London is key for its future, enabling the city to evolve positively in its role for a healthy habitation and a likely transformation for a new eco balanced era in response to the climate crisis.



Rectory Farm



Local logistics keeps society ticking

By Robin Woodbridge, SVP & Head of Capital Deployment, Prologis UK

Locating last-mile logistics facilities in urban areas is the key to powering sustainable local economies, filling crucial talent shortages and enabling the sector to continue its essential work.

The logistics sector supports the smooth functioning of society, not to mention 2.6 million jobs across the UK economy, but it took a global pandemic for the vital daily role it plays to be truly recognised. From February 2020 to August 2022, internet sales as a percentage of total retail sales jumped from 19.1 to 24.2 per cent and whilst peak growth during the pandemic has levelled the trajectory is clear.

A key challenge facing the sector, here in London and beyond, is space. Every year £67bn worth of goods flow through Prologis distribution centres in the UK alone — the equivalent to 2.5 per cent of the UK GDP. Knight Frank data suggests that for every extra £1bn spent by British consumers online, an additional 1.36m sq ft of logistics space is needed. And according to Prologis, for every sq ft of space required for a brick-and-mortar retail store, 3 sq ft of logistics space is needed to fulfil the same demand online. However, last-mile logistics facilities can't be located anywhere.

Online consumers want products to be delivered fast with a growing demand for same day deliveries. With the speed at which goods can be supplied to consumers beholden of how far away they are, last-mile logistics facilities must be located within urban areas with dense populations.

Whilst locating large warehouses on motorway junctions works well for storing bulk goods, it's naive to think you can just stick all last-mile facilities there as well. We've not yet come up with a teleporter to move things faster. As the need for goods to be delivered quickly continues to grow, you've got to hold a body of those goods closer to people. Of course, there is a housing crisis that needs to be solved but we need a sense of balance and greater awareness, among consumers and the government, of how important these facilities are.

“There is a damaging misconception that locating these facilities outside of cities is good for sustainability, reducing traffic and improving air quality. That couldn't be further from the truth. Through research produced in partnership with MIT, Prologis demonstrated that to be sustainable,

last-mile logistics facilities should be located close to where people live to enable the last-mile route to be faster as well as be handled by electric vehicles. According to the research, online shopping is 36 per cent more sustainable than bricks-and-mortar shops, a further 50 per cent if the right number of these buildings are in urban areas, and another 27 per cent via the shift to electric vehicles.”

In addition, locating logistics facilities closer to where people live not only allows for faster deliveries but creates lots of job opportunities close to home, from entry level to senior management. An Oxford Economics study (2020) of the 22 industrial logistics parks owned and run by Prologis in the UK found they were responsible for the employment of around 100,000 employees. Warehouse roles have become less prominent, accounting for 49 per cent of current jobs compared to nearly 70 per cent in 2006. A quarter of employees are in an office-based role while managerial roles make up 12 per cent of jobs.

Prologis has invested one billion pounds in London and the South East in the past two years to ensure it can provide the urban logistics facilities its customers need. Meanwhile, it has also recently introduced the Prologis Warehouse and Logistics Training Programme, a digital learning and development programme aimed at training those leaving education, the unemployed and those looking to re-skill, equipping them with the

knowledge needed to pursue a career in the logistics sector. The initiative is aiming to retrain 25,000 individuals globally by 2025.

Some of the most difficult roles for the sector to fill are software engineers and project managers, and Prologis have already got our customers queuing up to provide opportunities for the people we’re training. Prologis are proud to support such a crucial sector for our economy: it does a great job of getting on with what it’s asked to do without making a big fuss. But for too many years, we’ve taken it for granted. It’s a sector that should not be overlooked because it is vital for society to function in the 21st century. It is essential to everyday life, so we need to start planning for it now, whether that’s for creating local jobs or the sustainable location of last-mile facilities.



Co-location: delivering the right industrial mix?

By Christopher Schiele, Associate Director, Turley

Stepping out of its niche, Co-Location is becoming a ‘hot topic’ in the real estate world and a credible alternative, or at least centre of the debate, on how we approach employment land in the capital.

In March 2022, Turley published its first in-depth research on Co-Location schemes of strategic importance coming through the planning pipeline: ‘Co-Location in London’: Is it stacking up? This has now been updated one year on, dated February 2023. Our aim was to assess whether this concept has the potential to meaningfully contribute towards London’s supply of new homes and modern industrial floorspace.

In short, the answer was yes. The report demonstrates that the concept of Co-Location, and therefore giving some of our industrial stock a new life, undoubtedly has the potential to deliver a significant uplift in modern industrial floorspace. On average Co-Location projects increased the existing stock by 40.5 per cent across all reviewed sites, alongside over 30,371 much needed homes for Londoners. Such schemes, therefore, significantly assist the mayor in meeting two key strategic objectives contained in The London Plan.

However, many in the industry are asking whether the critical employment elements in Co-Location schemes truly cater to modern industrial and logistics occupiers’ requirement to provide fit-for-purpose, yet flexible, spaces. Although excelling in achieving a net intensification of floorspace, our research also shows a consistent trend towards a reduction in more traditional industrial uses (Use Classes B2, B8 and sui generis-type employment uses) across sites brought forward for Co-Location. Making up almost 76 per cent of the land uses prior to planning, this reduces to only 46 per cent across all schemes in the pipeline — predominantly being replaced by light industrial workspace (falling within Use Class E(g) (iii), former B1(c)). Whilst seemingly being more compatible in a changing context with the introduction of residential accommodation, it is apparent that the market is divided on whether the loss of ‘traditional’ industrial and logistics uses is an unintended co-product of Co-Location. This is a concern that the public and private sectors need to focus on.

Manufacturing facilities and distribution hubs are as critical to the capital’s economy (and the residents they employ) as space for our creative industries or



"Co-Location in London: Is it still stacking up?", Turley, February 2023 © Turley

Existing industrial / employment uses

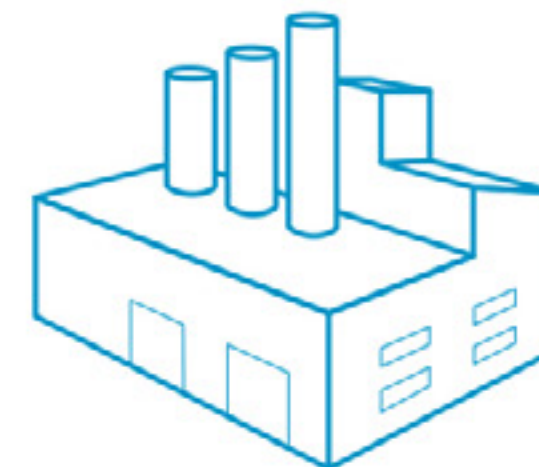
E (g)(iii)

24%



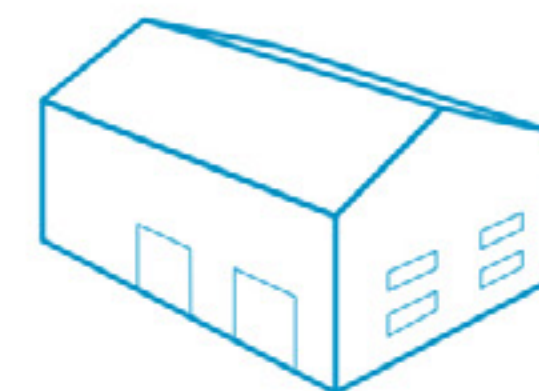
B2

20%



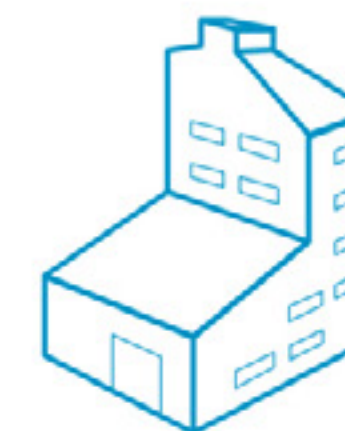
B8

37%



Sui Generis

19%



Proposed industrial / employment uses

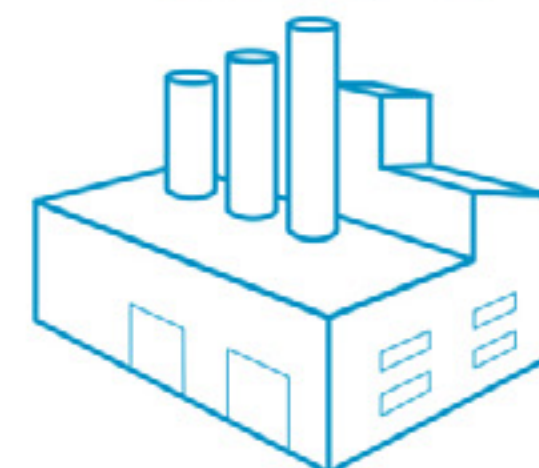
E (g)(iii)

54%



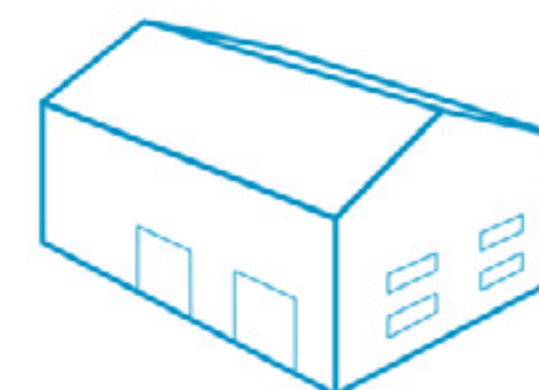
B2

15%



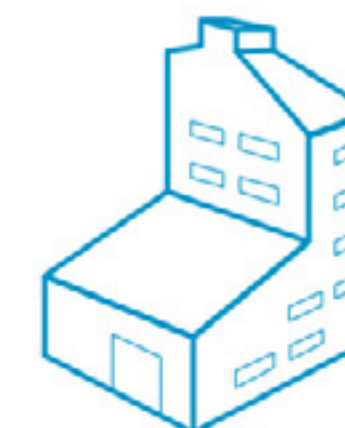
B8

30%



Sui Generis

1%



light industrial businesses. Yet, the significant reduction in traditional industrial uses across those sites is concerning, especially in light of the often-limited land availability to replace them. Clearly the conflict between residential amenity and operational requirements of (24/7) industrial and logistics occupiers, mixed with the challenging deliverability and buildability of stacked uses, are the main reasons for the replacement of B2/B8 floorspace. This is despite many local authorities (and private developers) identifying a significant need for such uses in their most recent evidence base documents or needs assessments.

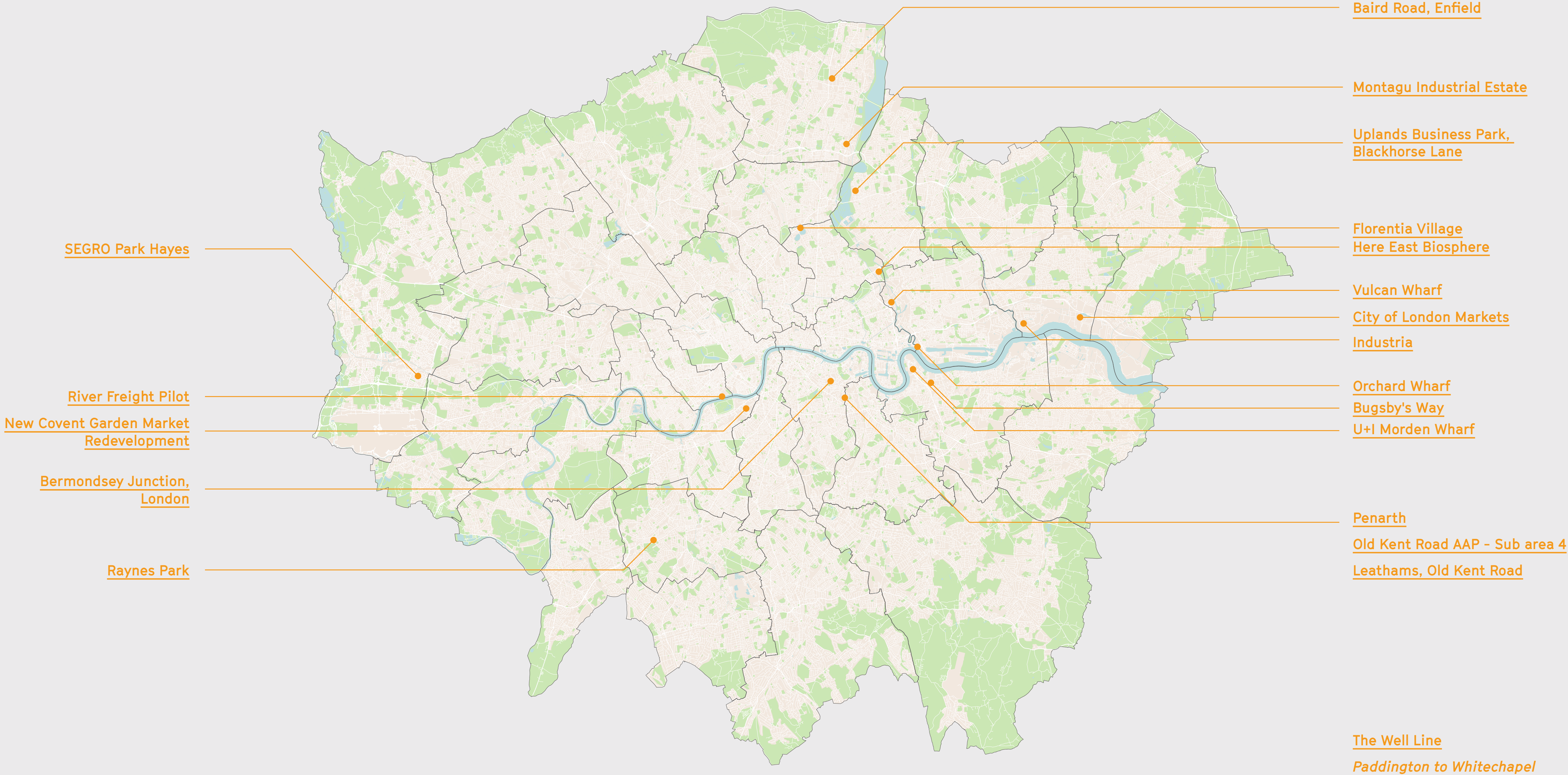
This is linked with the delivery aspect post-planning which many consented schemes are struggling with, be it due to viability, marketability, or other factors. Yet, the delivery of Co-Location schemes needs to come to the fore: bringing forward the mix of uses we need and ensuring they can co-exist through creative design solutions. First and foremost, we need to ensure that design solutions (often requiring some form of spatial separation between conflicting uses) allow us to deliver the employment uses that are most needed in a borough or area. Therefore, we are not settling for compromises that push much needed industrial uses out further, but finding answers on how to successfully deliver them in our Co-Location schemes.

This poses an intriguing challenge affecting all parts of the industry including planning, design,

construction, delivery and ongoing operations, and is as important to local authorities and the GLA at policy-making stage (adjusting/re-thinking relevant policies where necessary) as it is for the private development sector in order to masterplan deliverable Co-Location schemes that address our identified (employment) needs.

Finding innovative design-led solutions on the developer side, ideally brought forward in partnership between residential and industrial focussed developers, based on a strong understanding of commercial occupier and market requirements will enable the successful integration of B2/B8 uses. If well planned, this will lead to an exciting new mix of places, spaces and communities.

Project map – London Projects



Project map – UK wide Projects

Peddimore, Birmingham

Prologis RFI DIRFT

Didcot Quarter



Dogger Bank, Central Control,
Operations and Maintenance Facility

GLP G-Park Doncaster, Mammoth 602

Magnavale Easton

GLP Magnitude 314, Magna Park
Baytree Milton Keynes

Baytree Dunstable

London based projects

Bermondsey Junction, London

Bermondsey, London | *Status:* Under Construction | *Completion:* 2023

Developer: Arch Company | *Architect:* Lewis & Hickey | *Planning Consultant:* Turley

The Arch Company acquired Network Rail’s former commercial estate business in 2019. With a property portfolio of approximately 5,200 railway arches, business estates, former station buildings and other properties they are the landlord for more than 4,000 businesses across England and Wales. This makes them the UK’s largest small business landlord, working with thousands of business owners, from car mechanics to bakeries and restaurants. These enterprises provide a unique and vital contribution to the UK economy on a macro level and an even more vital contribution to neighbourhoods and communities at a local level.

As part of their development plan — Project 1000 — The Arch Company is investing £200m to bring a thousand empty and derelict spaces back into use by 2030. Project 1000 will create space for 1,000 businesses, supporting approximately 5,000 new jobs. With many smaller businesses having been squeezed out from fringe locations around central London in recent years, the development plan seeks to address this trend with relevant policy seeking to deliver new business units in ranging sizes for SMEs. Project 1000 will therefore play a valuable role in addressing this identified SME need in London, and in key urban areas across the country too.

A key project within Project 1000 is Bermondsey Junction, which is a large urban site of 0.79 ha of open land and 93 railway arches totalling c.150,000 sq ft of internal floorspace in Bermondsey, London. This core site spans both the London boroughs of Southwark and Lewisham. The railway arches and associated land have been vacant for over 10 years, having previously been utilised for

major infrastructure works associated with the delivery of the Thameslink project.

The Arch Company is committed to bringing this site back into active use through the phased delivery of an overarching masterplan.

“Project 1000 is an exciting and ambitious £200m development plan that demonstrates our commitment to creating thriving environments for a diverse mix of small businesses and their communities. Our long-term investment will create new spaces for 1,000 businesses and support approximately 5,000 jobs by the end of the decade.”

James Seabrooke, Development Director,
The Arch Company.



Here East Biosphere

Stratford | *Status:* Proposed

Client: Infinity SDC Ltd | *Architect:* Aukett Swanke | *Property + PM:* Savills | *Structure:* Buro Happold | *Fire:* Buro Happold | *Services:* Hurley Palmer Flat | *Cost Consultant:* BCS

Aukett Swanke designed a transformation of the inside of the Here East building previously designated for a data centre, and originally the 2012 Olympic Press centre, to enable a third use as a Multitech biosphere that can be home to B2 General Industrial, E Class, as well as workplace, R&D, education and leisure options. The existing structure is set inside new perimeter offices converted by others. Aukett Swanke carved in from skylight to GF a Manhattan grid of two avenues and three cross streets that introduced daylight and fresh air, whilst also creating 12 development zones, each with added CLT mezzanine levels. The transformation is served by loading bays and heavy goods lifts, to be a stacked and agile chassis that can keep inhabiting ever-changing tenants and their operations. This has involved a thorough analysis and profound reimagining of the two cavernous volumes inside the portal frames and concrete floors, extending up to the roof level and out to the side gantry. Aukett Swanke worked closely with specialist consultants to understand the challenges of the existing structure and service requirements to create a truly agile and enticing variety of public and private settings.



Industria

IO Centre Unit 10, 59–71 River Rd, Barking IG11 0DR | *Status:* Under Construction | *Completion:* 2023

Client: London Borough of Barking & Dagenham and Be First | *Architect:* Haworth Tompkins | *Structural Engineer:* Pinnacle | *Services Engineer:* MBA Consulting Engineers | *Industrial Architects:* Ashton Smith Associates | *Quantity Surveyor:* Fulkers Bailey Russell | *Contractor:* McLaren Construction | *Landscape Architect:* Landscape Projects | *Environmental Consultants:* WYG

Industria represents an innovative approach to modern industrial design, developed by Haworth Tompkins for BeFirst and the GLA, with the ambition to deliver a building that densifies and diversifies industrial space, in a move away from the traditional typology of single-storey, low density ‘sheds’. It will house a community of light industrial units and maker spaces within a modern, sustainable, multistorey building capable of flexing and adapting to future needs. The project is intended to act as an exemplar development and a catalyst for future industrial intensification projects and represents an exciting new industrial typology for the UK that has the potential to be of national significance in this field.

The site is located in Barking and Dagenham, on a brownfield plot within the River Road Employment Area, adjacent to the A13 and close to Barking Power Station. The building will deliver around 10,000 sqm of industrial space across 45 SME and Flatted Factory units of varying scales, stacked vertically across three levels and, importantly, providing vehicular access to upper floors by a helical van ramp that will allow industrial tenants to service their businesses directly. Shared central service yards ground, first and second floors sit between two building wings, each with generous 8m storey heights and wide spans achieved with an efficient steel frame design.

At ground level, a shared entrance lobby and business hub, and a new public café, alongside full-height, seven metre tall glazed ‘shopfronts’ to units, will engage the public and activate street facades. Along with a rooftop breakout space, with long views

west towards the City, these will provide spaces for tenants to meet, eat and socialise away from a busy work environment, helping to foster cross-pollination between tenants, and setting a new bar in terms of employee wellbeing for speculative industrial workspace.

“I’ve really enjoyed being part of the project team delivering Industria for Be First & the London Borough of Barking and Dagenham. It’s been exciting working on such a unique project to the UK, optimising often unutilised Industrial land to bring 45 new light Industrial units and potentially 350 new jobs to Barking and Dagenham. Key to the successful delivery has been ensuring we procured the right team to deliver the scheme, which judging by the performance of our Consultants and Contractor to date I believe we have demonstrated. There have been challenges along the way, not least delivering all this through a pandemic and unprecedented market conditions. Nevertheless, we’ve overcome these by working closely with the supply chain to ultimately deliver value via an efficient design that exceeds its deliverables while remaining commercially viable.”

Shane Flynn, Construction Manager, Be First



© HaworthTompkins



© HaworthTompkins

Leathams, Old Kent Road

202 Ilderton Rd, London SE15 1NT | *Status:* Planning Granted | *Completion:* January 2024

Client: London Borough of Southwark | *Architect:* Maccreanor Lavington | *Planning Consultant:* HGH Consulting

As part of the Old Kent Road plan, the Leathams scheme would deliver 253 homes and 3,581 sqm of industrial use, reproviding and intensifying the commercial floorspace. The scheme is an ambitious mixed-used project to create an architecturally rich and robust building which will strengthen and celebrate the area’s industrial character. The site sits at 227–255 Ilderton Road and the development proposes the construction of a part 2/3, nine and 28 storey (up to 94.65m AOD) mixed-use development comprising of 3,581 sqm industrial floorspace (Use Classes B1c/B8); and 253 residential apartments (C3), 35.75 per cent affordable by habitable room.

This scheme has been designed for B8/ logistics on the lower floors with 8m floor to ceiling heights and internal servicing arrangements which would allow for 24 hour servicing. A key aspect of the OKR AAP’s vision is to contribute to the diverse mix of existing uses that defines the area and will strengthen the special characteristics of the Old Kent Road, as a creative and productive part of London and its economy.

Through the re-provision of truly industrial floorspace alongside residential accommodation, the proposal will help ‘grow Old Kent Road’s significant local economy.

“The plan proposes to mix employment and residential uses at a scale not seen before in London or the UK.”

Colin Wilson, Head of Regeneration Old Kent Road, London Borough of Southwark



Montagu Industrial Estate

16 Stacey Ave, London N18 3PS | *Status:* Proposed | *Completion:* January 2027

Client: Joint Venture between HBD and London Borough of Enfield | *Architect:* Jefferson Sheard Architects |
Planning Consultant: Knight Frank

In September 2022, HBD (in a Joint Venture with the London Borough of Enfield) received resolution to grant planning permission for the comprehensive redevelopment of the Montagu Industrial Estate (subject to Stage Two referral to the GLA, and the completion of a legal agreement).

Designated as a Strategic Industrial Location (SIL) and Locally Significant Industrial Site (LSIS) the Montagu Industrial Estate is allocated for redevelopment within the London Borough of Enfield's Edmonton Leaside Area Action Plan (ELAAP) (2020).

The Hybrid Planning Application proposes the demolition of all existing buildings and structures across the 12 ha Site, with detailed permission sought for the reprovizion of a consolidated waste management area (Use Class B2), measuring 8,014 sqm, and outline permission is sought for the delivery of up to 40,000 sqm employment floorspace (Use Class B2 and B8 (alongside ancillary facilities)). The comprehensive redevelopment of the Montagu Industrial Estate will include an improved access from Montagu Road; the creation of new circulation routes; and public realm improvements (including the introduction of SuDS features).

The proposals will deliver many social, economic and environmental benefits, as follows:

- The regeneration of an underutilised brownfield site, to provide high-quality, modern fit-for-purpose industrial units.
- Achieve an uplift of up to 17,902 sqm of much needed, high-quality employment floorspace

(representing a 105 per cent increase), through improving plot ratios and exploring stacking (as encouraged by the London Plan).

- Reprovizion of a waste management area (as required by the North London Waste Plan).
- Creation of a safer and more attractive Industrial Estate, more sensitive to neighbouring residents.
- Improvements to surrounding residential amenity.
- Improvements to the setting of Montagu Road Cemeteries Conservation Area.
- An investment of £28.7 million during construction, generating a demand for circa 391 person years of employment, and 130 gross direct construction jobs per year of construction.
- Creation of 533 – 818 gross direct Full-Time Equivalent (FTE) jobs during operation.

“The regeneration of Montagu Industrial Estate will deliver employment space opportunities for industrial and logistics operators seeking modern accommodation in this key London location. By attracting these operators, the project will be bringing jobs and economic activity to the Borough. We are delighted to be working in partnership with London Borough of Enfield in making this change happen”

Harry Bunbury, Director, HBD



New Covent Garden Market Redevelopment

Nine Elms Ln, London | *Status:* Under Construction | *Completion:* 2026

Client: Vinci St Modwen & Covent Garden Market Authority | *Architect & Masterplan:* BDP

New Covent Garden Market is the largest wholesale fresh produce market in the UK and prior to redevelopment, it covered a site of 57 acres (23 ha). By 2011, when Vinci St Modwen became the preferred bidder, the market buildings and surrounding infrastructure were showing their age, which negatively affected the perception of the market. Whilst the movement of goods, pedestrians, forklift trucks and other vehicles were hindered by cluttered hard standings.

In 2011, BDP working for VSM and their partner CGMA began to develop the planning application for the new market, which was approved in January 2015. Construction started in July 2015 and is being delivered in 19 phases by Vinci Construction and BDP over a 12 year period. The final phase on the retained Market site will complete in 2026.

The new design consolidates the market south of the Vauxhall railway viaduct, releasing 20 acres of surplus land, which is being transformed into a high-quality residential neighbourhood along the Linear Park as part of the Vauxhall Nine Elms Battersea Opportunity Area including the American and Dutch Embassies.

The new Traders Blocks are aligned north-south and divided into 6m wide traders' units with vehicle doors facing external yards. External mezzanine and plant access walkways run along the length of each block above the vehicle doors, providing safe pedestrian routes to every trader's unit as part of the Workplace Transport Strategy. Each block is wrapped by the roof, which is carried throughout the market as a unifying design theme.

The 'Food Exchange' provides a new front door for the market facing onto the new garden square that links Nine Elms tube station to the new residential neighbourhoods to the north. The new market acts as a catalyst and destination for a new London Food and Horticulture Quarter.

"Business continuity is vital for the traders who work in a very competitive environment with marginal profit margins and need to retain existing customers so that the market can continue to exist. This has resulted in an extended phased construction programme, including the construction of two interim traders buildings, that has to be carefully considered and managed to maintain trading and access for all of the businesses operating on the market. The new market is a state-of-the-art modern facility that meets current building performance targets and provides a food-clean environment. It separates pedestrians from vehicles on the hard-standings creating a safer working environment for traders, buyers and visitors. The new, improved buildings have changed perceptions of the market as a modern, clean, state-of-the-art facility, befitting for the 21st century. The new Food and Horticulture Quarter acts as a focal point for food and horticultural business in the locality and across London."

Paul Mulligan, Architect Director, BDP



Orchard Wharf

Orchard Wharf, Orchard Place, Tower Hamlets, London | *Status:* In planning

Client: Regal London | *Hybrid Architect:* Aukett Swanke | *Marine Consultants:* Independent Port Consultants (IPC) and Ramboll | *Structural Engineer:* Bradbrook Consulting | *Services Engineer:* Hurley Palmer Flat | *Landscape Architect:* Spacehub | *Residential Architect:* JTP | *Transport:* Vectos | *Planning:* Montague Evans, DP9

Orchard Wharf is a progression in Aukett Swanke's Hybrid Design approach that reactivates a long idle wharf on the north bank of the Thames opposite Greenwich Peninsula. A bold and invigorating scheme for the River Thames, it was driven by the client Regal London where Aukett Swanke then created an agile and river-fed industrial space of 80,000sq ft, with 10m clear heights, up to 22m clear spans and integrated it with six residential towers around the edges on this landmark site. The large industrial roof and canopy over the river loading zone create a biodiverse and multi-use garden for the residents with spectacular views over the river and towards the O2 Centre Dome. Aukett Swanke were invited to join the team to create and develop the design for a Hybrid approach, bringing their market leading skills and experience for blending industrial with residential and other uses, engaging fully with public realm at street level. The project is a collaboration with JTP on the residential parts.



U+I Morden Wharf

215 Tunnel Ave, London SE10 0QW | *Status:* Planning Granted | *Completion:* 2033

Client: U+I Group | *Architects:* OMA, Chetwoods, Carmody Grooke | *Project Manager:* Gardiner & Theobald LLP |
Engineer: Ramboll | *Landscape Architect:* Planit

Morden Wharf is a milestone industrial intensification project on a Strategic Industrial Location that housed the former Tate & Lyle sweeteners refinery on the Greenwich Peninsula. It will reinvent the area’s industrial past, co-locating industrial logistics with residential, workspaces and retail and community spaces, whilst engaging with the existing community.

Chetwoods developed the industrial element where the challenge was to provide a viable commercial solution that allows optimum flexibility, whilst being bold with the design approach to reflect the site’s industrial heritage and create a cohesive community co-located with the adjacent residential development.

The variety of proposed industrial and logistics buildings include the conversion of an existing building that engages with the public realm, a new build warehouse for a larger single operator, a business incubator for SME, and maker space facility for small creative industrial businesses, whilst creating a vibrant gateway to the development.

The overall site will be redeveloped as a 178,300 m2 mixed-use scheme expected to deliver 1,505 homes with 35 per cent affordable. Over 60 per cent of Morden Wharf is dedicated to public realm, including a 3.9-acre riverfront public park to address the shortfall of green space and ecological resource on Greenwich Peninsula.

Wellbeing and sustainability are at the heart of the proposals for a truly mixed-use scheme of residential, commercial and outdoor public space that will create a thriving and productive

neighbourhood and a model for the future of urban living. Residential buildings feature vertical green facades that will provide natural screening and improve air quality. Communal allotments and gardens encourage outdoor socialising and learning. A new mobility hub promoting low-carbon transport will better connect the neighbourhood to the local area.

“As the architects responsible for the industrial element of the scheme, the challenge was to provide a viable industrial solution that allows optimum flexibility, whilst being bold with the design approach to create a cohesive community with the neighbouring residential development.

The key was to produce a commercial ecosystem that would allow businesses to grow and develop. The industrial past of the site is at the core of the design approach for the Masterplan, where the gateway to a new community is through SIL land.

For several years our ‘Warehouses of the Future’ research programme has been looking at new industrial intensification templates in response to the challenges facing retail, residential & logistics. We have been exploring exciting new concepts based around multi-storey warehouses and mixed-use urban logistics.”

Tim Ward, CEO, Chetwoods



Uplands Business Park, Blackhorse Lane

Uplands Business Park, E17 5QN | *Status:* In planning (submitted) | *Completion:* 2034

Client: BlackRock/NEAT Developments | *Architect:* Allies and Morrison | *Planning consultant:* Turley | *Landscape Architect:* Bradley-Hole Schoenaich Landscape Architects | *Engineer:* Meinhardt | *Transport:* Ardent

Uplands Business Park is a 5.45 ha site located at the centre of the Blackhorse Lane Strategic Industrial Location (SIL), home to a diverse mix of both creative businesses and traditional industry. Many have begun to trade directly with customers on-site, which has attracted people into the area. The re-provision and long-term retention of industrial uses at Uplands lie at the heart of this hybrid masterplan and underpins the design decisions and strategies. The redevelopment of Uplands has been designed in line with the Blackhorse Lane SIL Masterplan Framework (London Borough of Waltham Forest with the Greater London Authority and landowners, 2022), which establishes a coordinated plan for the SIL.

Key to the plans is an industrial intensification strategy that re-provides industrial uses first, and in more efficient stacked and co-located typologies. Uplands provides an increase in industrial capacity from 28,000 sqm to up to 33,000 sqm while introducing a range of other uses such as commercial, community and up to 1,800 new homes, of which 35 per cent are affordable.

By delivering over 50 per cent of the industrial floorspace within stacked industrial buildings in Phase one, an inclusive relocation strategy allows existing businesses to remain on site. It also provides most of the new industrial floorspace closest to the strategic road network, in turn reducing industrial traffic in the remainder of the site. Stakeholder engagement and market research were critical aspects in establishing the needs of current and future industrial businesses from the outset.

The open spaces respond to the new neighbourhood’s key functions: work (industrial yard); homes (community yard), enjoyment (commercial yard) and nature (waterside park).

“Industrial intensification, and co-location, are simple ideas but not easy to deliver. At Uplands, there were several constraints that our designers had to work through: a high-pressure water tunnel requiring a 22m non-piling zone diagonally across the site, and the need to be a good neighbour to a girls’ secondary school were two of the most pressing. But we also wanted to keep as many of the existing businesses as possible and give them quality production areas as well as front facing sales spaces. At the same time, we needed to consider the new uses, particularly the residential element. Crucial was the separation of the industrial route and the non-industrial “neighbourhood” route to give a road infrastructure serving the industrial floorspace in parallel to a safe and attractive network of streets and open spaces for pedestrians and cyclists. All of this has to be affordable, and flexible enough to adapt to changing requirements — for example, we’ve included a flexible block that can be delivered as podium industrial or as stacked industrial. We hope Uplands will become a high quality 15 Minute Neighbourhood.”

Brian Reynolds, NEAT Developments





Baird Road, Enfield

Dearsley Road, Enfield EN1 3FB | *Status:* Planning Granted | *Completion:* 2023

Baird Road will provide c.4,700 sqm of modern, flexible industrial and logistics floorspace. Given, the site’s location in an emerging ‘placemaking’ area, the team worked with the Borough to ensure a building of a high architectural design quality. The development incorporates sustainable design measures, including the use of zero-carbon technologies, the provision of a green, biodiverse roof, health and well-being benefits for future occupiers, EV charging points, a significant net gain in biodiversity, and targeting a BREEAM Excellent rating.

Client: IM Properties
Architect: UMC
Planning Consultant: Turley



Bugsby's Way

Bugsby’s Way, London SE10 OGD | *Status:* Proposed | *Completion:* 2030

Bugsby's Way is a development of a multi-level industrial/ logistics scheme with a wide range of unit sizes/types, including SME space on a 3.38 acre industrial site on the Greenwich Peninsula, with excellent links to central London and from the M25. It is owned by Greater London Authority Land and Property (GLAP). The site has significant potential for intensive industrial/ logistics development that is expected to attract a variety of businesses and provide employment opportunities to the local community.

Client: GLA
Architect: Chetwoods



City of London Markets

Chequers Lane, Barking, Dagenham RM9 6PF | *Status:* Planning Granted | *Completion:* 2030

The City of London Corporation has secured planning permission for the relocation of London's historic wholesale markets to a single consolidated food market at Dagenham Dock. The plan which will regenerate 42 acres of industrial land, stimulating the local economy and ensuring resilience in the food supply of London and the South East, has gone to Parliament for final approval.

Client: City of London Corporation

Architect: Chetwoods



© SecchiSmith, Turner Works

Florentia Village

85 Vale Rd, Finsbury Park, London N4 1FG | *Status:* Planning Granted | *Completion:* 2024

Located in the Harringay Warehouse District the extension to Florentia Village will deliver circa 100,000 sq ft of light industrial space in a series of double stacked 'workshop' buildings, oriented around communal yards and interconnected by external walkways. The buildings will be BREEAM Excellent and will be Net Zero Carbon in use, making the scheme at the forefront of its type. The extension to Florentia Village is designed to create community driven, flexible, good value, high quality workspace for local small businesses with secure occupational policies.

Client: General Projects

Architect, Graphic Designer:
Turner Works



Old Kent Road AAP – Sub area 4

Ilderton Rd, London | *Status:* Under Construction | *Completion:* 2030

The Old Kent Road provides a number of services that are essential for the support of the local environment and the functioning of the central London Economy. These sectors are being retained and grown across the opportunity area — Southwark’s ambition is to accommodate growth in homes and jobs as set out in the Area Action Plan. Co-location of industrial alongside residential uses will strengthen the special characteristics of OKR, as a creative and productive hub for London and its economy.

Client & Masterplan: London Borough of Southwark

Architect: Farrells



Penarth

16–28 Penarth St, London SE15 1TX | *Status:* Proposed | *Completion:* October 2024

A mixed-use development located within Southwark’s Old Kent Road Area Action Plan, Penarth re-provides light industrial accommodation and workspace on the lower floors for the existing landowner, James Glancy Design. On the upper floors, 249 co-living studios, with shared facilities alongside a standalone affordable housing block comprising 33 dwellings, are provided across three blocks. Penarth demonstrates an imaginative approach to the re-provision and intensification of industrial land. The project facilitates the retention and future growth of an existing business within this strategically important area of Southwark, whilst also unlocking potential to create new homes for a range of tenures.

Client: Moda Living

Architect: Child Graddon Lewis

Cost Consultant: Cast

Planning Consultant: Union4

Structural Engineer: Lyons O'Neil



Raynes Park

579 Kingston Rd, Raynes Park, London SW20 8DT | *Status:* Proposed | *Completion:* June 2025

An exciting mixed use industrial building offering maker spaces, offices, storage and commercial trade counter space. This unique building brings together the site's industrial heritage through its form and materiality whilst providing a community facility for local people to work and shop. The scheme aims to promote a local, cyclical economy with offices for small business and maker spaces that can use the storage facility for a range of needs. The generous public realm along the site's frontage contains trees and planting whilst the maker space and offices above provide activity on this otherwise disused Brownfield site.

Client: Access Self Storage

Architect: DMWR Architects



SEGRO Park Hayes

Nestles Ave, Hayes UB3 | *Status:* Built | *Completion:* September 2022

SEGRO and Barratt London are delivering London's first neighbourhood that blends homes with much-needed industrial employment space. The scheme will deliver over 1,400 homes (600 affordable) and 240,000 sq ft of sustainable warehouse space on the site of a former Nestlé factory, retaining the site's heritage and art deco facades. It has been identified by the Greater London Authority as a model for how to intensify the use of London's industrial land and address the competing needs for housing and employment space.

Client: SEGRO, Barratt London

Architect: Michael Spark Architects

Contractor: Volker Fitzpatrick



The Well-Line

Paddington to Whitechapel | *Status:* Proposed | *Completion:* 2030

The Well-line addresses London’s pollution and congestion problems by converting the disused underground Post Office Railway — London’s longest brownfield site running six miles from Paddington to Whitechapel — into a new hi-tech logistics supply line. The line has good connections to other transport infrastructure — air, rail, canal and road — presenting the opportunity to link it to out of town logistics hubs. Consolidated deliveries from multiple logistics companies could reduce the number of goods vehicles in the city centre by 60 per cent.

Architect: Chetwoods



Vulcan Wharf

1 Cook's Rd, London E15 2PW | *Status:* Planning Granted | *Completion:* January 2026

Vulcan Wharf delivers a cohesive and sustainable ‘co-location’ community with a mix of uses that fulfils planning aspirations for the site and an architectural design that harmoniously co-locates them. Discreet access points around an industrial podium ‘box’ encourage electric vehicle fleets and minimise impact on residents, sitting alongside makerspaces and residential entrances that activate the public realm. The industrial uses, including last-mile logistics, are separated visually and acoustically from the 457 homes above by a generous, shared landscaped podium garden.

Client: London Square, Peabody
Architect: Assael Architecture, Metropolitan Workshop
Planning Consultant: DP9
Industrial & Logistics Consultant: Savills
Transport Consultant: Velocity Transport Planning
Energy, Sustainability, MEP & Acoustics Consultant: Hoare Lea
Structural Engineer & Flood Consultant: Conisbee Engineers
Environmental Consultant: Trium Environmental Consultants
Daylight Sunlight Consultant: Point2 Surveyors
Wind Consultant: RWDI
Air Quality Consultant: AQ Consultants
Ecology Consultant: Richard Graves Associates
Landscape Architect: Assael Extérieurs

GLP G-Park Doncaster, Mammoth 602

1 Lincolnshire Way, Armthorpe, Doncaster DN3 3FF | *Status:* Built | *Completion:* 2022

Client: GLP | *Architect:* Chetwoods | *Sustainability Champion:* Chetwoods Thrive | *Engineer:* Burrows Graham | *M&E / Sustainability Engineer:* KTA | *Project Manager:* RAME

Mammoth 602 at GLP's G-Park Doncaster is the largest and most sustainable logistics building in the North of England with a best-in-class specification, constructed as net-zero carbon in line with the UKGBC framework, and adopting the Planet Mark accreditation scheme.

Mammoth 602 is a strong example of GLP's commitment to sustainability across its developments. It is GLP's third building to be net zero carbon for construction, in line with the UKGBC framework, and is part of the Planet Mark accreditation scheme which helps to further reduce the carbon footprint for the occupier.

'Built for logistics' the 55,905m² development offers significant additional, increased storage capacity with three additional racking heights, 37,000 additional pallet positions and one additional mezzanine over and above a standard 15 metre to eaves building.

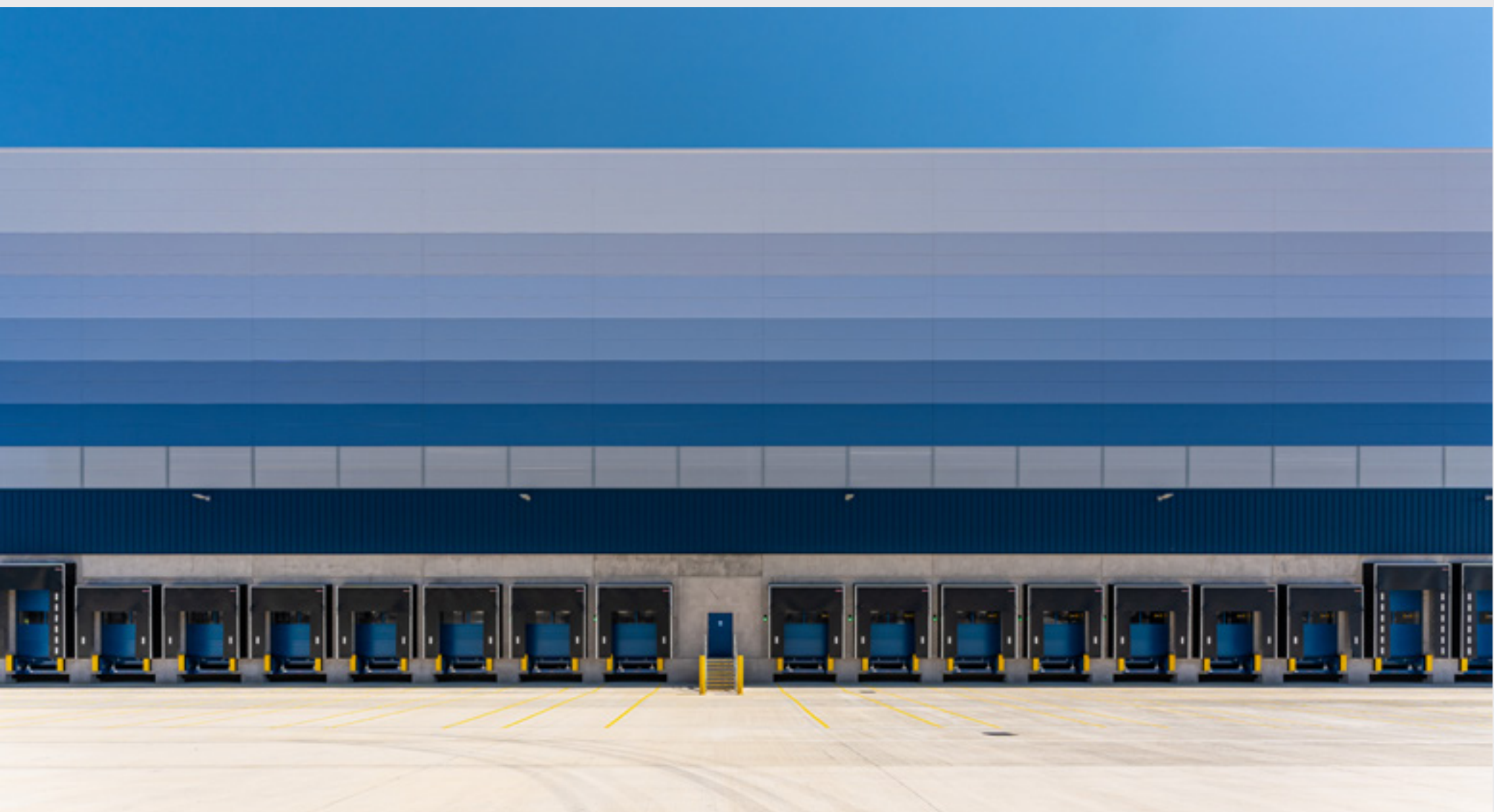
In addition to an array of GLP standard sustainability features, including rainwater harvesting and a building analytics system, the development is home to unique initiatives such as the 'Tiny Forest'. This is a collaboration with Earth Watch and Rame Consulting to establish a small, densely planted group of trees, encouraging biodiversity and carbon sequestration, whilst also acting as a wellness feature for tenants and the local community.

Chetwoods were lead architects for the design and delivery and Chetwoods Thrive team acted as Sustainability Champion ensuring GLP's sustainability targets were reached on the project, helping to reduce carbon emissions where possible.

"We have partnered with GLP for over thirty years to pioneer the design of some of the most sustainable logistics warehouse developments for which both companies are renowned. During this time we have worked together to develop innovative approaches and solutions and we continue to collaborate closely to push boundaries. We have acted as master planners, design and delivery architects, and ESG consultants". Tim Ward, CEO Chetwoods

"Mammoth 602 exemplifies GLP's innovative and comprehensive commitment to sustainability. Doncaster is already home to a variety of top-tier companies, including Next, Amazon, IKEA, B&Q and Asos, and we look forward to welcoming Maersk as a new customer."

Adrienne Howells, Senior Development Director at GLP Europe



GLP Magnitude 314, Magna Park

Fen Street, Milton Keynes MK17 8HF | *Status:* Built | *Completion:* 2020

Client: GLP | *Architect:* Chetwoods | *Contractor:* Readie | *Structural Engineer:* Hydrock | *Sustainability Champion:* Chetwoods Thrive

Magnitude 314 is a ground-breaking 29,182m² logistics development at GLP’s flagship logistics park Magna Park Milton Keynes, that on completion in 2020 was confirmed as the world’s first Net Zero Carbon for Construction verified building in line with the UKGBC framework.

It is GLP’s 6th building to go through the Planet Mark accreditation scheme and part of its strategy to reduce the carbon footprint further.

GLP is committed to achieving continual improvement not only in terms of how efficiently it constructs buildings, but in the specifications it sets out and the materials used. On the development of Magnitude the project team went a stage further to undertake more detailed, deeper assessments of the build, with the building specifications set to maximise both efficiency and sustainability of materials, resulting in significantly lower levels of embodied carbon.

Key members of the building supply chain including material manufacturers and component suppliers were asked to provide a complete breakdown and assessment of the products being supplied including details of their origin, embodied carbon value and whether the product can be reused or recycled. Chetwoods Thrive and Circular Ecology, along with other leaders in their fields, were engaged to help the design team and wider supply chain collaborate and reduce as much embodied carbon as possible.

An innovative design approach tested principles of grid-based modular systems and standardisation, to improve elevations and interiors, reduce waste, and improve ease of construction, efficiency and

flexibility. The office element was designed for maximum future flexibility whilst maximising space. The design was adopted as the new model for all future GLP projects.

The project followed WELL principles throughout and is rated BREEAM 2014 Excellent.

"Magnitude was a pilot scheme for GLP to test how construction projects can align with the UKGBC Framework definition for Net Zero Carbon buildings. This involved intensive workshopping with the wider supply chain, putting carbon reduction methodologies to the test." Philippa Birch-Wood, Chetwoods Thrive Director

"Magnitude is a milestone development for GLP and the logistics industry. It paves the way for further net zero carbon development as we continue our strategy of reducing our carbon footprint, keeping sustainability at the forefront of both the design and construction processes. We are proud to have developed the world’s first building to be verified as net zero carbon for construction and look forward to continuing our sustainability journey."

Steven Alexander, European Head of Construction, GLP Europe



Magnavale Easton

Burton Ln, Grantham NG33 | *Status:* Under Construction | *Completion:* 2024

Client: SADEL Group | *Project Manager:* SBH | *Masterplan:* Campus Park Ltd | *Architectural and Interior Design:* Campus Park Ltd | *Structural Engineer:* Royal HaskoningDHV | *Services Engineer:* PWP Building Services | *Contractor:* McLaren Construction | *Facade Engineer:* ISD Solutions | *Refrigeration Specialist:* GEA Group | *Automation Specialist:* Swisslog

Magnavale Easton is an automated high-bay clad-rack cold storage scheme located near Grantham, Lincolnshire. With a total storage capacity of over 100,000 pallets, the scheme will become the largest independent single stage build new storage building ever built in the UK. It measures over 200m long and 45m tall and has a functional volume approaching 800,000 m³. Construction work began on-site in 2021 and is due to complete in late 2024.

The project is strategically well-located directly adjacent to the A1 on brownfield land between other existing manufacturing and distribution buildings which will continue to operate throughout the build programme. The tight nature of the site and programme challenges provided Campus Park and the design team with the opportunity to utilise an off-site prefabricated clad-rack construction for the high-bay element of the build which also utilises advanced techniques such as oxygen reduction to minimise the risk of fire, the use of an automated crane and multi-level conveyor system and BIM integration across disciplines from the outset. The energy-efficient automation element of the build, thermographic surveys and the ‘lights-out’ dark-warehouse operation assist with the targeting of a BREEAM Very Good rating. A single envelope composite panel solution is utilised due to its thermal performance and large panel sizes.

In addition to the high-bay element of the build which can operate at -20°C, the team have also designed a low-bay zone which is operated at the same temperature and features vertical pallet lifts to value-added-services across two upper levels which can be operated by separate logistics entities.

The overall facility is operated from an adjoining multi-level new-build office which incorporates a canteen space, open plan workspaces, dedicated video-conferencing spaces, openable windows for natural ventilation, raised access floors and tall exposed ceilings.

“The cost of living crisis and the covid pandemic have brought storage and distribution into focus. Magnavale is at the forefront of cold food storage in the UK and we are grateful to be working with them on a range of expansion and upgrade projects in this reinvigorated industry. The utilisation of modern methods of construction, automation technology and efficient thermal envelopes have allowed the team to design a building that is far taller and more efficient than would be possible with a traditional build. Although not commercially viable for co-location with other typologies due to the build height, insurance risk and specific structural and thermal systems, this type of innovative architectural solution minimises land take to a significant degree and will ultimately help to stabilise and reduce costs to the consumer. Project Magnavale Easton is a great precedent for how the whole cold storage industry is evolving and we are excited to already be working on similar builds to cater directly for the London market which utilises multiple modes of transportation including shipping utilising the Thames riverways and urban / last-mile logistics.”

Chris Berry MRICS, Director, SBH



Peddimore, Birmingham

Peddimore Ln, Minworth, Sutton Coldfield B76 | *Status:* Under Construction | *Completion:* 2023

Client: IM Properties and Birmingham City Council | *Architect:* UMC | *Planning Consultant:* Turley

Peddimore comprises one of the UK’s most significant new manufacturing and logistics sites. It is allocated and granted hybrid planning permission for 71 hectares of employment land, delivered in a strategic and nationally central location to the northeast of Birmingham, through a joint development partnership between IM Properties Plc and the landowners, Birmingham City Council.

As one of the UK’s most significant new manufacturing and logistics sites, Peddimore will significantly help to address the needs of international, national and regional businesses in the industrial and logistics sectors, delivering over four million sq ft of employment space. Peddimore is also set to deliver extensive socio-economic and environmental benefits, creating thousands of jobs, uplifts in regional productivity, training opportunities and open space enhancements.

Following the approval of hybrid planning permission in 2019, the construction of Peddimore began in July 2021. The associated employment uses are set to be delivered across three development zones; the first of which began construction in July 2022. This includes the delivery of a storage and distribution unit measuring over two million sq ft GIA, which by itself will bring around 1,000 full-time equivalent jobs to the local area.

The delivery of Peddimore is set to continue for years to come and is committed to including a minimum of around 30 hectares of manufacturing and research and development uses. This delivery will also be complemented by substantial commitments and benefits continuing beyond its

completion, including towards sustainability, social value and high-quality design. This includes pledges to BREAMM ‘Excellent’, a Green Travel District to improve local public transport and walking/ cycling routes, public art installations, and local employment and partnerships.

Consequently, Peddimore is guaranteed to deliver the high-quality, best-in-class employment development it set out to be, providing a lasting positive legacy on both a regional and national scale.

“As one of the most active developers in the region we are aware that occupiers are looking for the best working environments, which is paired with the fact that there is a critical lack of industrial land supply in the area, so we are already seeing high levels of interest. We are also pioneering an extensive social value programme associated with Peddimore, which will accelerate with the delivery phase. This is already demonstrating tangible benefits for the local community and will help to fulfil our ambition of delivering a lasting legacy.”

*Kevin Ashfield,
UK Development Director, IM Properties*



Prologis RFI DIRFT

Danes Way, Northampton NN6 7FT | *Status:* Built | *Completion:* 2021

Client & Development: Prologis

In 2021, Prologis UK developed a new training and education facility at the UK’s largest rail-served logistics park, Prologis RFI DIRFT. The project, The Hub at DIRFT, is a unique and dedicated space for logistics training and education — the principles of which can be repeated and scaled throughout London.

A strong emphasis at The Hub was placed on sustainability from the outset:

- ❶ The concept of delivering a training facility on the site was to ensure customers could recruit high-quality employees locally and reduce travel
- ❷ Materials were sourced in line with the architect's Sustainable Procurement Plan and the use of lighter colours on external finishes reflect thermal radiation and help avoid overheating
- ❸ Sustainability initiatives to reduce operational carbon include the installation of automatically monitored energy-efficient lighting and on-site renewables (PV and solar thermal)
- ❹ The site provides 10 EV car charging points and was built with future electrification requirements in mind.

Prologis made socially conscious decisions to strive for excellence in the following ways:

- ❶ Environmental: BREEAM Excellent rating at Design Stage, an Energy Performance Certificate A+ rating indicating beyond net carbon in operation, Planet Mark certification with an

overall carbon reduction of 50 per cent alongside the provision of park-wide Green Travel initiatives and EV charging points.

- ❷ Social: Generated over £13m in social value since opening and trained over 200 people (including from disadvantaged backgrounds) — 15 per cent have gone onto full time employment in logistics.
- ❸ Governance: Worked with local communities to ensure our developments are a force for good. This project is a testament to positive and impactful placemaking.

The design of the building reduces average lifetime carbon; but what is equally important is the impact on health and wellbeing. The Hub is part of the next generation of environmentally responsible buildings which is at the forefront of everything we do at Prologis.





Baytree Milton Keynes

Bletcham Way, Bletchley, Milton Keynes | *Status:* Built | *Completion:* 2022

A pioneering high-spec industrial warehouse for Baytree Logistics Properties at Fenny Lock, Milton Keynes that delivers health and wellbeing to its users. The two-unit development is the first project in the logistics/ industrial sector to incorporate a Digital Twin approach to its design and subsequent building management. It utilised the Baytree Sensor Suite as part of the base build specification to manage a healthy working environment while reducing operational and maintenance costs.

Client:
Baytree Logistics Properties
Architect: Chetwoods
Contractor: Glencar
Engineer: Burrows Graham
M&E / Sustainability Engineer:
Kelly Taylor Associates



Baytree Dunstable

Thorn Road, Houghton Regis, Dunstable LU5 6JS | *Status:* Built | *Completion:* 2018

The world's first WELL Building Standard pilot industrial scheme representing an innovation in the design and delivery of logistics buildings. WELL™ principles were applied to incorporate environmental and wellbeing design features throughout the scheme. The Baytree Sensor Suite, installed as part of the base building specification, manages a healthy working environment while reducing operational and maintenance costs. Sensors monitor air and water quality, internal noise, lighting, humidity and temperature, occupancy and occupancy patterns.

Client:
Baytree Logistics Properties
Architect: Chetwoods



Didcot Quarter

University Technical College, Didcot OX11 6FD | *Status:* Built | *Completion:* 2021

Didcot Quarter repurposed a brownfield site next to the former Didcot Power Station in Oxfordshire into a high-spec industrial complex which puts employee health and wellbeing at its heart. The use of a wide range of materials, surfaces and finishes enhances the building's positive impact on users and visitors. Over five acres of landscape amenity space has been provided for employee well-being including a grass amphitheatre with a waterside setting, set among native trees and plants.

Client: Savills Investment Management
Architect: Chetwoods
Contractor: Winvic
Structural Engineer: Hydrock
Landscape Architect: Aspect

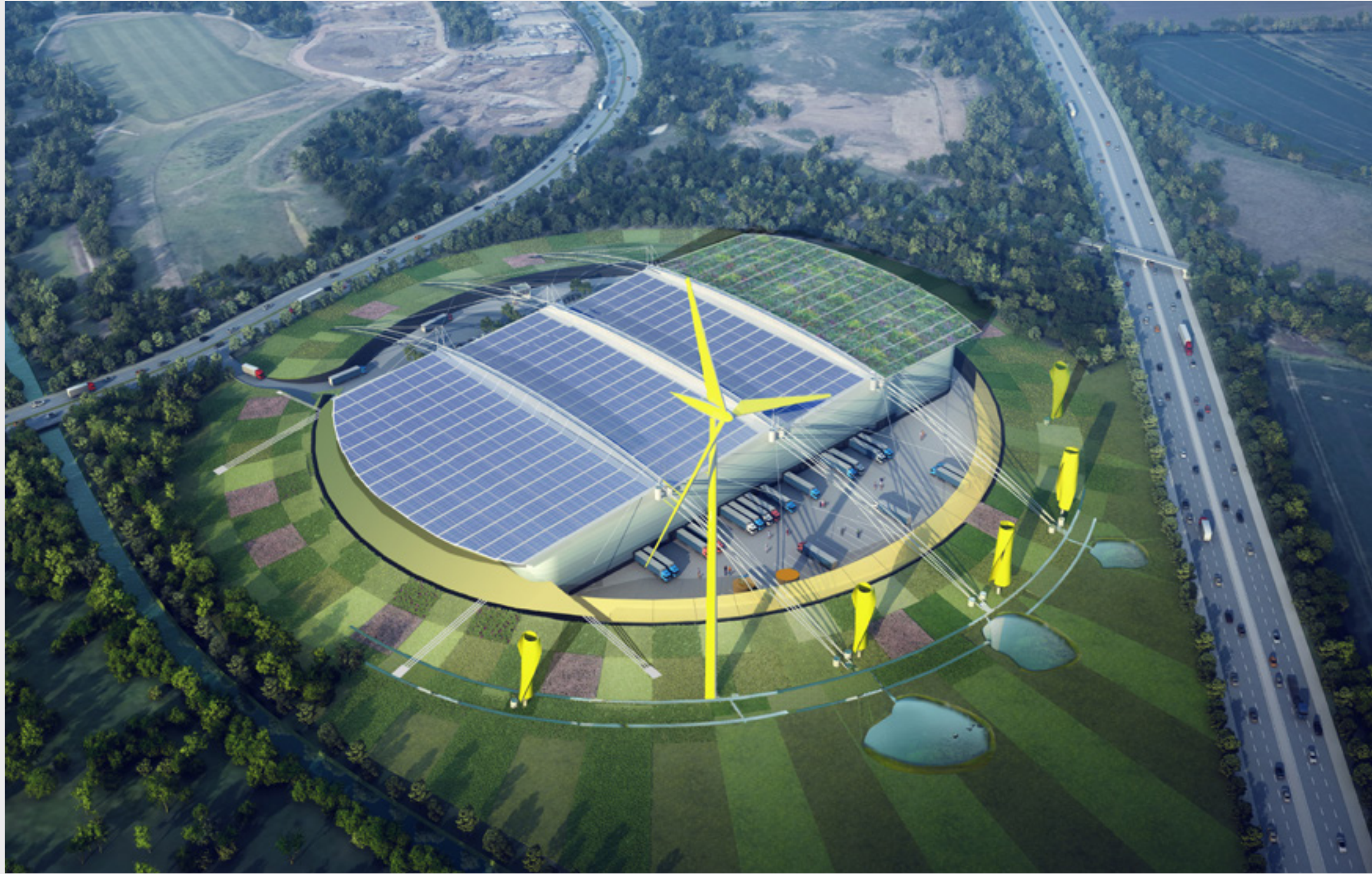


Dogger Bank, Central Control, Operations and Maintenance Facility

Tyne Terrace, South Shields NE34 | *Status:* Under Construction | *Completion:* 2022

Dogger Bank is the world's largest offshore wind farm, located 130km off the north east coast with an installed capacity of 3.6 GW, capable of powering up to 5m UK homes. Facilities include offices, central control room and warehousing with quay access for marine vessels. The project is Net Zero Carbon in construction by aligning with the UKGBC framework definition and is designed to operate to Net Zero Carbon standards, balancing energy demand of this fully electric development with on site renewable energy generation.

Clients: SSE Renewables, Equinor and Vårgrønn
Architect, Interior Designer, Landscape Architect: Ryder Architecture
M&E / Sustainability Engineer: CBRE Investor and Developer Project Management
Structural Engineer: Fairhurst
Acoustic Engineer: Apex Acoustics
Fire Engineer: Jensen Hughes



Project Opus

Status: Proposed | *Completion:* 2028

A fully circular scheme that aims to achieve Net Zero Carbon without offsetting. The design includes an array of features including wind turbines, and seeks to enhance the local environment and improve occupant health and wellbeing. The building and surrounding landscape act as one entity, each benefiting from the other in a symbiotic way. The native flora and fauna spills into the site, and the landscaping is either edible, encouraging pollinators, or used for recreational purposes.

Architect: Chetwoods



River Freight Pilot

Embankment Gardens, London SW3 | *Status:* Built | *Completion:* September 2022

From July to August 2022, Cross River Partnership, along with project partners ran a successful river freight pilot, the first of it's kind, delivering office supplies from Dartford into Central London via Woolwich Ferry.

Project Manager:
Cross River Partnership
Communications Manger:
Cross River Partnership
Project Officer:
Cross River Partnership

Endnotes

1

[The economic, social and environmental benefits of the industrial & logistics sector, March 2022](#)

2

[Logistics Report 2022](#)

3

[https://www.centreforlondon.org/news/future-of-freight-and-deliveries/](#)

4

[WRK/LDN: shaping London's future workplaces, NLA, 2016](#)

5

[https://logistics.org.uk/research-hub/download-form/the-impact-of-logistics-sites-in-the-uk-download-f](#)

6

[https://www.investopedia.com/terms/l/logistics.asp](#)

7

[UK Online Retailing Market Report 2022, Mintel, 2022](#)

8

[Logistics Real Estate and E-Commerce Lower the Carbon Footprint of Retail, Prologis Research](#)

9

[Making Space: Accommodating London's industrial future, Centre for London, 2022](#)

10

[How much space is needed to service the last-mile and where is consumer demand greatest?, Knight Frank, 2021](#)

11

[Re:Imagining Retail, Savills, 2019](#)

12

[The Impact of Logistics Sites in the UK, Logistics UK, 2022](#)

Further Reading

→

[Industrial intensification and co-location study: design and delivery testing, gla, 2018](#)

→

[CBRE Global E-commerce Outlook Update](#)

→

[Co-Location in London: Is it still stacking up?, Turley, February 2023](#)

→

[London Plan Evidence, London City Hall](#)

→

[London Industrial Land Supply Study 2020 - London Datastore](#)

Acknowledgements

NLA would like to thank our Champions: Aukett Swanke, GLP, Prologis, Turley.

Special thanks to the following people for sharing their time, expertise and insights, and their own research through interviews, discussion and/or participation in NLA workshops and events:

Researcher: **Clare Dowdy**
Editor: **Federico Ortiz, Morgan Lewis, Florence Maschietto**
Designer: **Ruby Bergin**
Marketing and communications: **Sophie Goff**

Contributors

- Mike Best**, Head of Logistics, British Land
- Clare Bottle**, Chief Executive, UK Warehousing Association
- Hugo Braddick**, Associate Director, Haworth Tompkins
- Mark Brearley**, Head of Cass Cities, London Metropolitan University and Proprietor Kaymet
- Catriona Fraser**, Director, Planning, Turley
- Tim Clement**, Head of UK Multi-Let, JLL
- Amy Gillham**, Director, Economics, Turley
- Giles Heather**, Director, Linesight
- John Oosthuizen**, Strategy Planner, Freight, Transport for London
- Jörn Peters**, Principal Strategic Planner, Greater London Authority
- Patrick Shannon**, Masterplan Project Manager, London Borough of Waltham Forest

NLA Expert Panel on Industrial and Logistics

- Tom Alexander**, Director, Aukett Swanke (Chair)
- Adam Blacker**, Director, DMWR Architects
- Mark Bradbury**, Director of Property & Economy, London Borough of Enfield
- Hugo Braddick**, Associate Director and Industrial Sector Lead, Haworth Tompkins Architects
- Ian Craig**, Director, Evolve
- Melinda Cross**, Director, Industrial and Logistics, JLL
- Catriona Fraser**, Director, Planning, Turley
- Caroline Harper**, Chief Planning Director, Be First
- Steve Harrington**, Board Director, Regal London
- Neil Impiazzi**, Partnership Development Director, SEGRO
- Joost Lansbergen**, Senior Associate, Gensler
- Damien Meehan**, Technical Director, WSP
- Francis Moss**, Principal Regeneration Officer, London Borough of Ealing
- Carita Ogden**, Public Policy Manager, Amazon Logistics
- Bridget Outtrim**, Director, Savills
- Tom Parker**, Senior On-Road Policy Manager, Amazon Logistics
- Josh Pater**, Partner, Gerald Eve
- Emily Pearson**, Senior Surveyor, Gerald Eve
- Jörn Peters**, Principal Strategic Planner, London Plan & Growth Strategies Team, Greater London Authority
- Tim Smith**, Product Development Manager, Container Freight Logistics Services, DP World
- Gwyn Stubbings**, Senior Planning Director, GLP
- Victoria Towers**, Partner, Forsters
- James Trimmer**, Director of Planning and Development, Port of London Authority
- Tim Ward**, Managing Director, Chetwoods
- Robin Woodbridge**, Senior Vice President and Head of Capital Deployment UK, Prologis



Aukett Swanke develops inspiring ideas to drive our designs for people places, agile buildings and innovative spaces across a focus of sectors including offices, hotels, retail, residential, education, healthcare and workplace consulting. We have a collegiate design culture that enables our teams to explore and evaluate bold ideas from one sector to another, cross fertilising and invigorating designs from concept to detail. We are rigorously inventive and open to debate. Research + Development is fundamental to our design work, enabling us to define and lead markets. Our design teams thrive in creative collaborations with clients, project teams and major stakeholders and firmly believe that a collective drive for excellence creates innovative, elegant and agile designs. We also take great care to balance the dynamic forces of creativity and economics, developing bespoke strategies and elegant designs that enable and excite users and occupiers, whilst embracing and valuing the client's budget. For us sustainability is the 4th dimension, taking responsibility for our designs through time.

Our holistic and humanitarian design approach seeks to deliver passive energy measures, viable economics and a durable design legacy. We design for now and future generations. We are also custodians of both our architectural history and our client relationships, bringing respect and craftsmanship to both, preserving our built heritage, and inspiring client loyalty.

Encompassing over 115 years of professional experience, we have a network of over 250 staff in 4 locations across the UK, UAE, Turkey and Germany

Aukett Swanke
10 Bonhill Street,
London, EC2A 4PE
+44 (0) 20 7843 3000
london@aukettswanke.com
aukettswanke.com



GLP is a leading long term global investment manager and business builder in logistics, data infrastructure, renewable energy and related technologies.

Our combined investing and operating expertise allow us to create value for our customers and investors. In the UK we have more than £2.3 billion in assets under management and have 42 properties in our operating portfolio with key schemes such as Magna Park Milton Keynes, Magna Park Lutterworth and G-Park Doncaster.

Our UK operating portfolio consists of just under 12 million square feet in key strategic logistic markets across the United Kingdom which is leased to blue chip customers such as John Lewis, Royal Mail, Amazon, DHL and XPO Logistics.

We are committed to a broad range of environmental, social and governance (ESG) commitments that elevate our business, protect the interest of our shareholders and investors, support our employees and customers and enhance our local communities.

50 New Bond Street,
London W1S 1BJ

info@glp.com

glp.com



Prologis is the leading owner and developer of logistics parks in the UK and has been investing heavily in London and the South East for over 15 years. In the UK alone, £54 billion of goods flow through Prologis' warehouses each year — that's the equivalent of 2.6 per cent of the UK's GDP and growing.

Prologis believes it's time for the logistics sector to build on a new level of awareness created by the COVID-19 pandemic and highlight the critical importance of the sector and the enormous contribution it makes to the UK economy.

Although conversations about the future of the logistics sector, in particular, often revolve around rapidly emerging technologies such as automation, robotisation, and AI (artificial intelligence), there is a fundamental asset all logistics companies will need if they are to meet the growing demand for last mile delivery in urban areas. That fundamental asset is space, and in the right places.

One of the main challenges Prologis is focused on is the loss of land earmarked for industrial logistics in the Capital, which could lead to a last mile delivery crisis. The growth in online sales driven by the pandemic and a need to store more goods in the UK and closer to where people live and work will have a significant impact on market demand, property types and locations. Close to cities like London, for example, where industrial land competes with fierce demand from different uses, such as residential, finding locations on which to locate logistics buildings is challenging. To give an idea of the scale of this loss, over the past decade, the capital has lost around 100 hectares of industrial land annually.

Prologis Office – 2nd Floor
30 Great Pulteney St
London W1F 9NN

ukenquiries@prologis.com

prologis.co.uk

Turley

Turley is a full service national planning and development consultancy.

Our Planning expertise is complemented by Design, Business Cases & Funding, Economics, EIA, Expert Witness, Heritage and Townscape, Landscape and VIA, Strategic Communications and Sustainability services. All services can be provided together or individually.

We help clients achieve good growth in all jurisdictions in the UK and Ireland from our locations in major cities and growth areas.

Our teams are experts in their fields; they shape better places and achieve success for our clients. We work across all major built environment sectors and advise on projects of all scales and complexities ranging from a change of use to a multi-phased mixed use development or delivering specialist or innovative residential products. We have a strong track record across the London Boroughs and established good relationships with the GLA.

As a leading consultant in the Industrial and Logistics sector (and NLA programme champion) as well as advising on a wide range of other development types, we work with national and regional developers and investors across London, the South-East and the rest of the UK and Ireland to secure planning permissions for high quality and innovative developments (including co-location masterplans), as well as providing leading advice on green and sustainable growth, economic assessments and social value initiatives. We pride ourselves on thought leadership to help support the industry and public sector in developing progressive planning, economic and environmental policy.

Turley,
Lacon House,
84 Theobald's Road,
London WC1X 8NL

+44 (0)20 7851 4010

sara.beswick@turley.co.uk

turley.co.uk

NLA Principal Partners



NLA Champions





NLA is London's built environment community: an independent, purpose-led organisation for everyone with an interest in London's built environment.

NLA's programme and its family of brands and projects engages the broadest possible audience across government, business and the public and abroad to educate, challenge, connect and create positive change.

From public realm to workspaces to London's homes and more, NLA's broad range of projects, research and events connects London's network of professionals and enthusiasts, uniting the industry to shape a better city.

New London Architecture (NLA)

nla.london

info@nla.london

+44 (0) 207 636 4044

 [@nlalondon](https://twitter.com/nlalondon)

 [@nlalondon](https://www.instagram.com/nlalondon)

Principal Partners:

