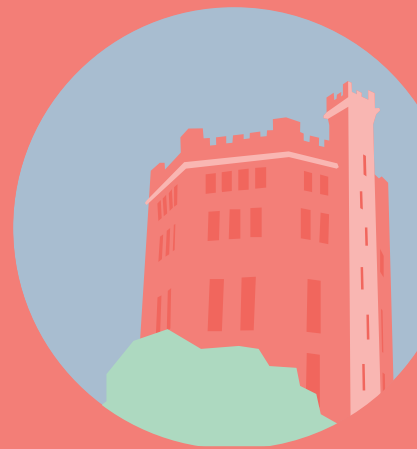
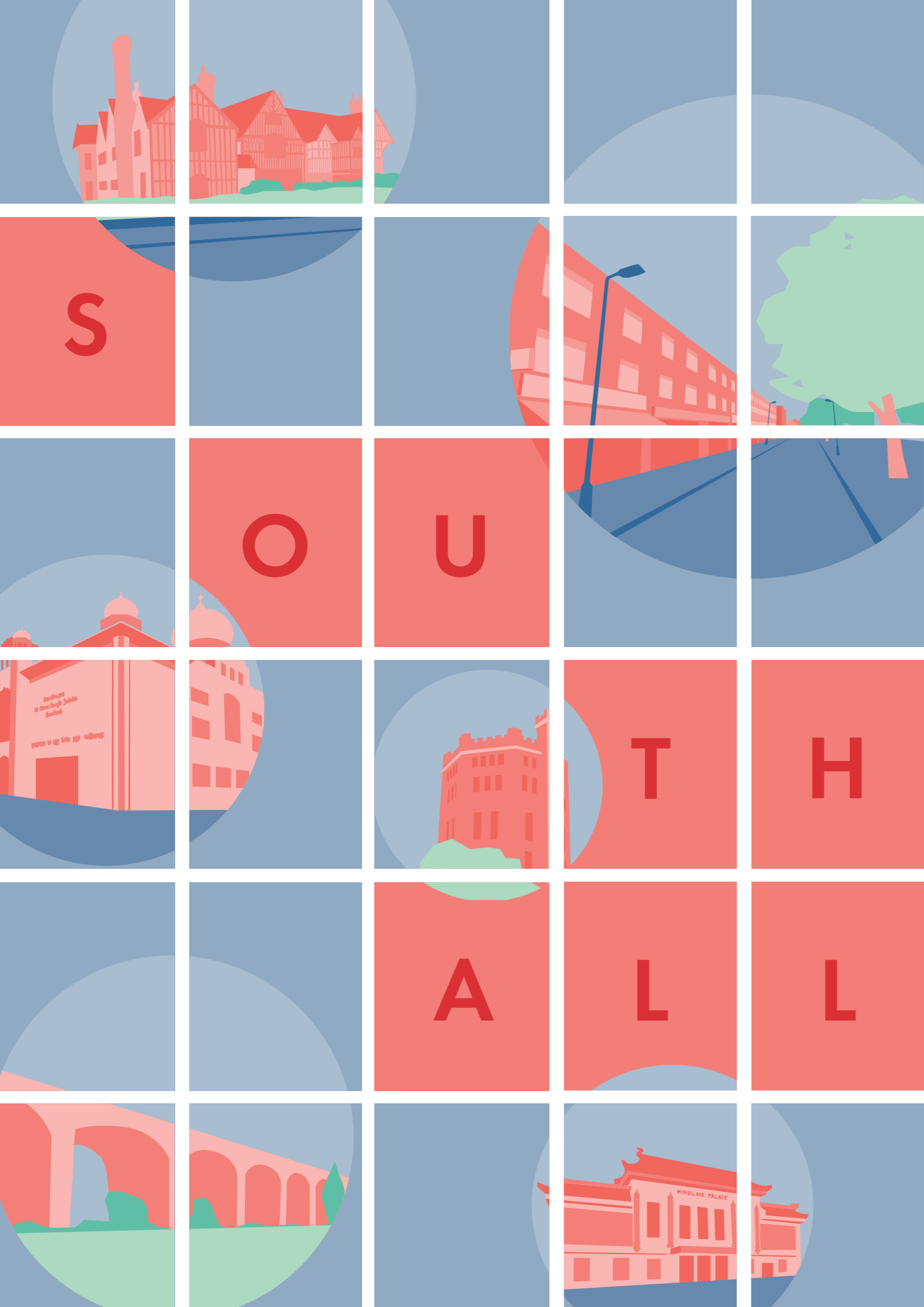


# SOUTHALL BASELINE STUDY

APRIL 2022



Allies and Morrison  
Urban Practitioners



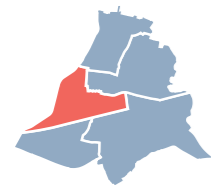
# Contents

<b>1</b>	<b>PORTRAIT OF SOUTHALL</b>	<b>04</b>
	DEMOGRAPHIC SUMMARY .....	06
	LOCAL LANDMARKS .....	08
	AMENITIES AND INFRASTRUCTURE .....	10
	SOUTHALL'S TOWN CENTRE .....	12
	SOUTHALL'S ECONOMY .....	14
<b>2</b>	<b>EVOLVING CONTEXT</b>	<b>18</b>
	MAJOR DEVELOPMENTS .....	20
	LAND USE SUMMARY .....	30
	DEVELOPMENT STATUS .....	34
	EVOLVING CONTEXT .....	36
	LAND USE SUMMARY PLAN .....	38
	BIRD'S EYE VIEW .....	40

# Portrait of Southall

# Demographic summary

1.1 Southall is a vibrant part of Ealing borough home to a rich variety of local people, places and jobs that each contribute to character and identity. This rich mix covers a range of demographics including ethnicity, age, sex, population density, residential and economic characteristics. This page summarises some key demographic data found across Southall, broken down by local ward.

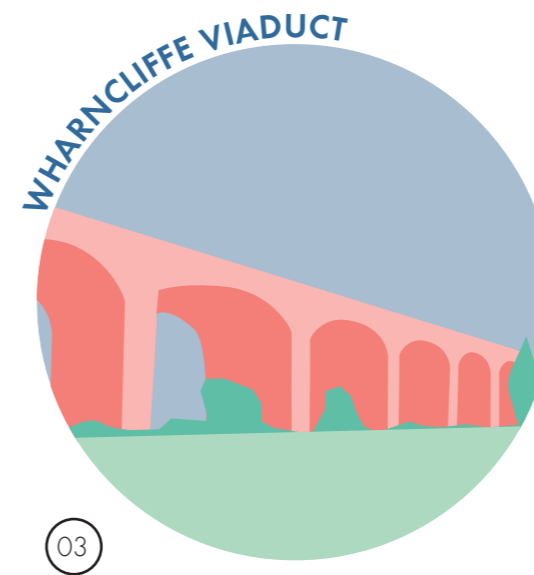
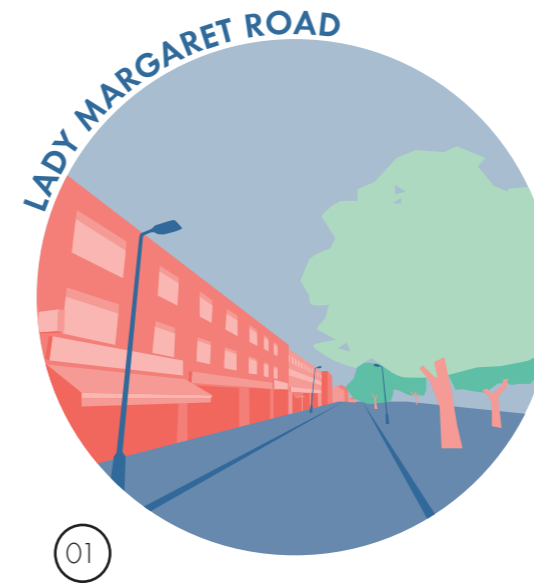


	Population (2020)	Projected population (2030)	Population density (people per sqkm)		Age (%)	Sex	Ethnicity	Average household size	Economically active population (%)
<b>Southall Broadway</b>	<b>15.1k</b>	<b>25.1k</b>	<b>13.2k</b>		65+ 12.1 16 - 64 65.5 0 - 15 22.4	male 8.1k female 14k	asian 11.6k white 0.9k black 1k	<b>3.7</b>	<b>63.4</b>
<b>Southall Green</b>	<b>16.7k</b>	<b>21.1k</b>	<b>11.5k</b>		65+ 10.4 16 - 64 65.5 0 - 15 24.1	male 9k female 7.7k	asian 10.2k white 1.2k black 1.8k	<b>3.6</b>	<b>65.4</b>
<b>Norwood Green</b>	<b>14.6k</b>	<b>17.9k</b>	<b>5k</b>		65+ 13.6 16 - 64 65.7 0 - 15 20.7	male 7.3k female 9k	asian 7.6k white 4.2k black 2.3k	<b>3.2</b>	<b>63.8</b>
<b>Dormers Wells</b>	<b>14.2k</b>	<b>15.5k</b>	<b>8k</b>		65+ 15.7 16 - 64 61.4 0 - 15 22.9	male 7k female 8.1k	asian 8.2k white 3.2k black 2.3k	<b>3.2</b>	<b>64.5</b>
<b>Lady Margaret</b>	<b>13.1k</b>	<b>12.9k</b>	<b>9.5k</b>		65+ 15.2 16 - 64 63.9 0 - 15 20.9	male 6.6k female 6.4k	asian 11.8k white 4k black 1.8k	<b>3.5</b>	<b>69.2</b>

Sources:  
Population, age, sex - 2020-based trend and housing-led demographic projections by GLA  
Population density, ethnicity - Super Output Area Population (LSOA, MSOA), London by ONS  
Average household size, economically active - Census 2011 by ONS

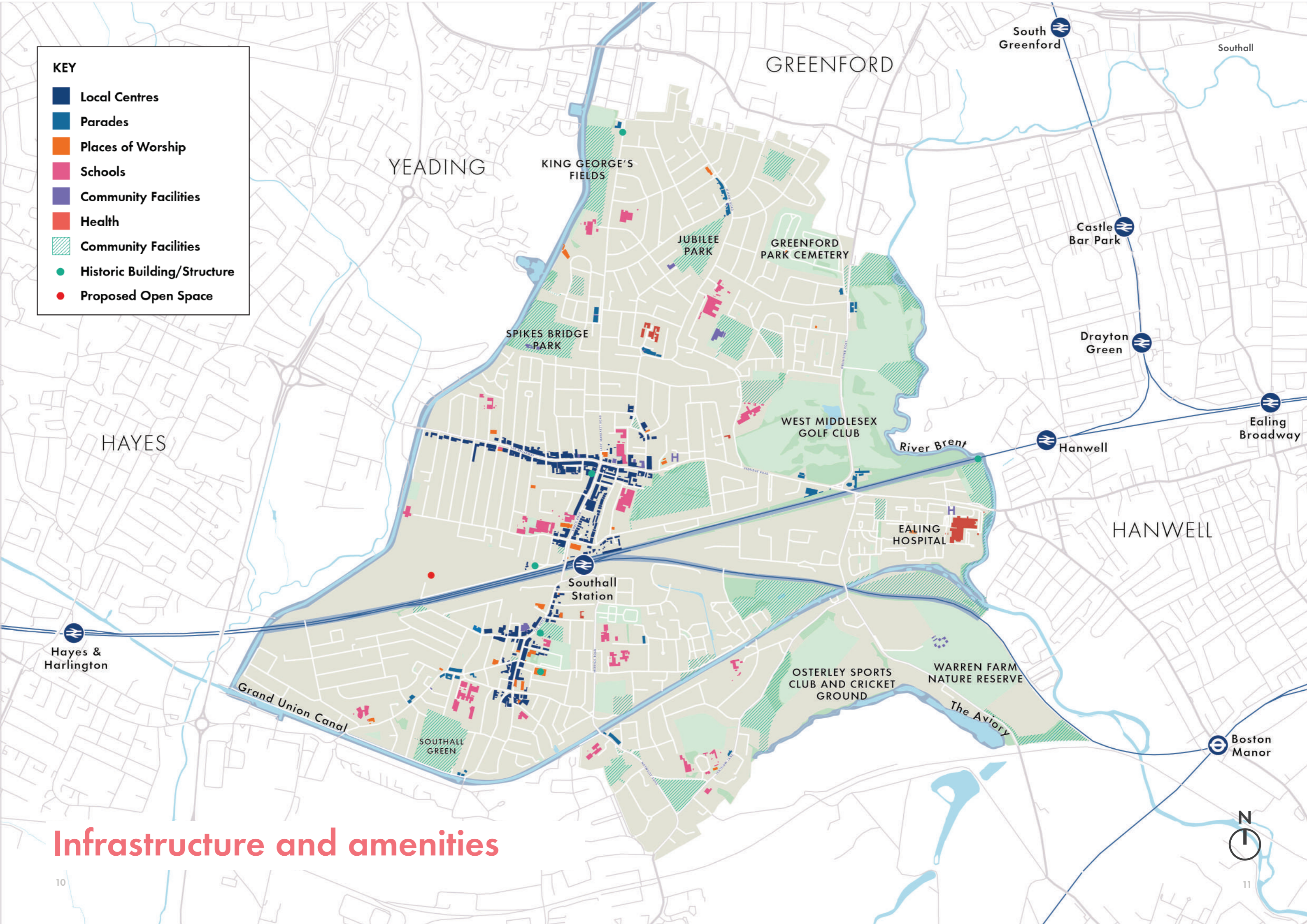
# Local landmarks

1.2 Southall has a rich and varied built character with a number of local landmarks found across the area. These landmarks tell a story of the area's local heritage and the diverse communities that call Southall home. A series of six key landmarks are illustrated opposite and annotated on the diagram of Southall below.



**KEY**

- Local Centres
- Parades
- Places of Worship
- Schools
- Community Facilities
- Health
- Community Facilities
- Historic Building/Structure
- Proposed Open Space



# Infrastructure and amenities

# Southall's town centre

- 1.3 Southall's town centre is a vibrant and animated place home to a high concentration of public-facing mixed uses. It comprises two main shopping parades including along the A4020 'The Broadway' and A3005 'South Road'. Much like a traditional town centre it has a wide provision of shops, places to eat and drink, workplaces and social infrastructure.
- 1.4 A 2022 Town Centre Health Check undertaken by ARUP identified the following in their assessment:

### Strengths

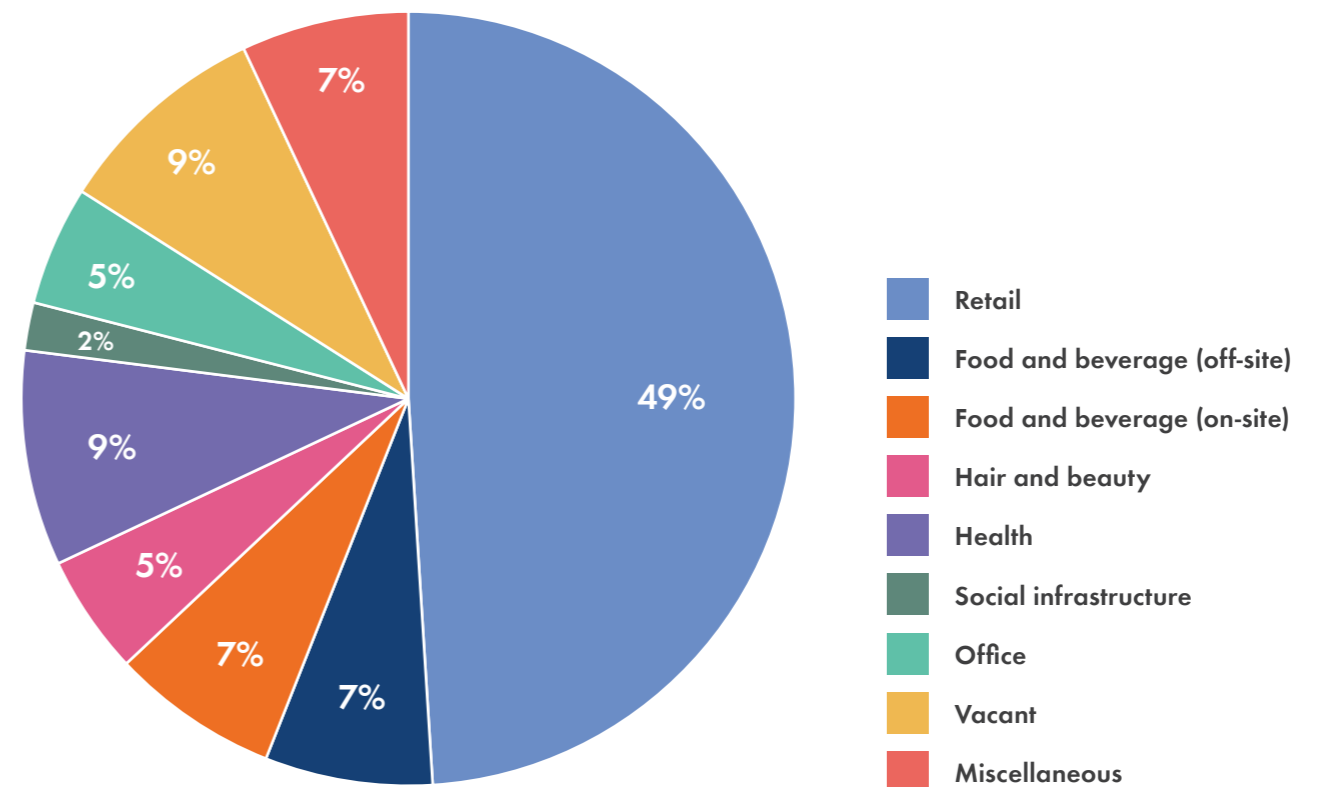
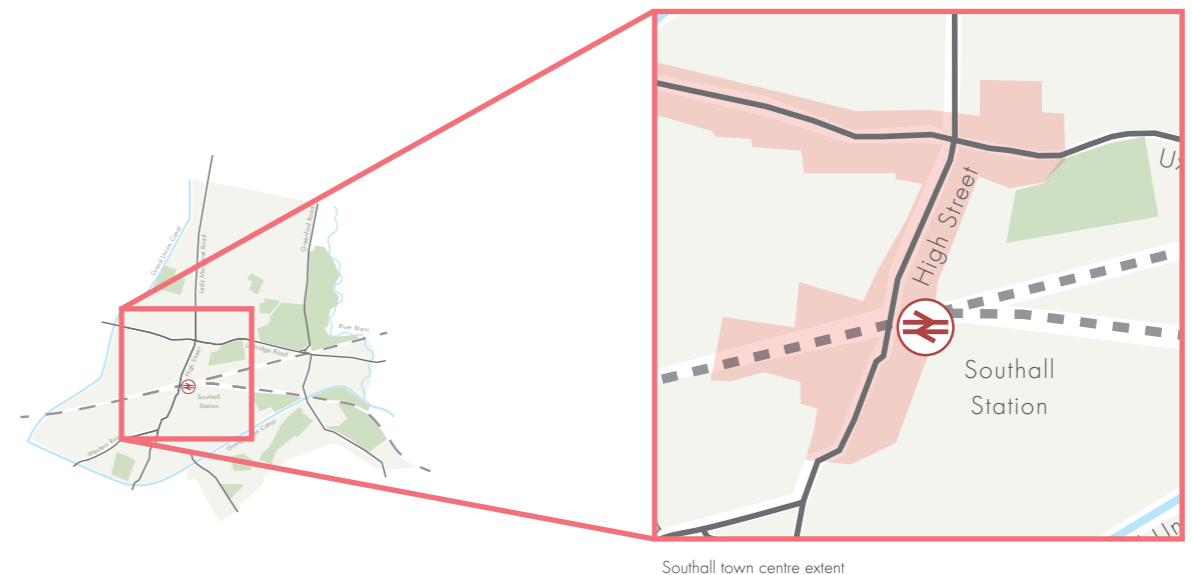
- Southall has a very strong identity and character which is distinctive from town centres across the Borough and London.
- There is a good range of town centre uses and offer, providing lots of reasons to visit the town centre.
- Higher spend post-COVID on eating and retail - retail here is primarily comprised of comparison shopping, which could therefore be indicative of people choosing to shop more locally.
- There is a very strong presence of local businesses.
- There are very good public transport links which help provide access to a range of visitors and residents.
- During site visits it was observed that the town centre was very busy.
- Visitor footfall has predominantly returned to normal or slightly higher.

### Challenges

- The environment is somewhat appealing but incidental greenery in the streetscape is limited.
- There is no digital infrastructure which provides WiFi to visitors and feedback to businesses / the council.
- The leisure offer is average but could be enhanced beyond takeaways.
- Cycling infrastructure is limited and there are few cycle parking facilities and cycle lanes.
- Resident footfall has decreased marginally below normal of pre-COVID levels.

### Opportunities

- Better integration of incidental greenery into the streetscape and better provision of spaces to sit and relax in the town centre.
- An enhanced leisure offer to help increase footfall during both the weekday and weekend.
- Better cycle infrastructure to help facilitate mode shift away from car reliance.
- Promotion of Southall's strong identity to the wider Borough and London.



Source: Town Centre Health Check Southall, 2022. By ARUP

# Southall's economy

- 1.5 A 2022 study undertaken by We Made That for Ealing Council gathered information on Southall's local economy, its businesses and physical make-up. The following statistics and commentary are based on their findings.
- 1.6 Southall has an economy characterised by a mix of productive activities often located within designated industrial sites and undesignated industrial buildings. A high concentration of businesses are clustered in the designated site Great Western Strategic Industrial Land, with a number of smaller clusters including International Trading, Featherstone and Bridge Road - all of which are designated Locally Significant Industrial Sites.
- 1.7 The economy comprises a number of mixed sectors and activities, with the most common including wholesale; manufacturing; services; vehicle sale, repair and hire; and transport and logistics. This variety is also complemented with instances of more specialised activities including prop hire and recording studios.
- 1.8 The biggest sector in Southall are businesses and jobs related to the food industry. This includes food manufacturing, catering and wholesale particularly specialising in South Asian food and products - many of which are independent with their origins in Southall. Whilst some businesses rely partly on international trade, a number of them are well integrated with the community - supplying high street retailers and restaurants in Southall.



Source: Industrious Ealing Southall audit, 2022. By We Made That.

**384 businesses** (but only 120 within designated industrial areas)



**4,171 jobs** (3,223 within designated industrial areas)



**428,269 sqm of employment floorspace**



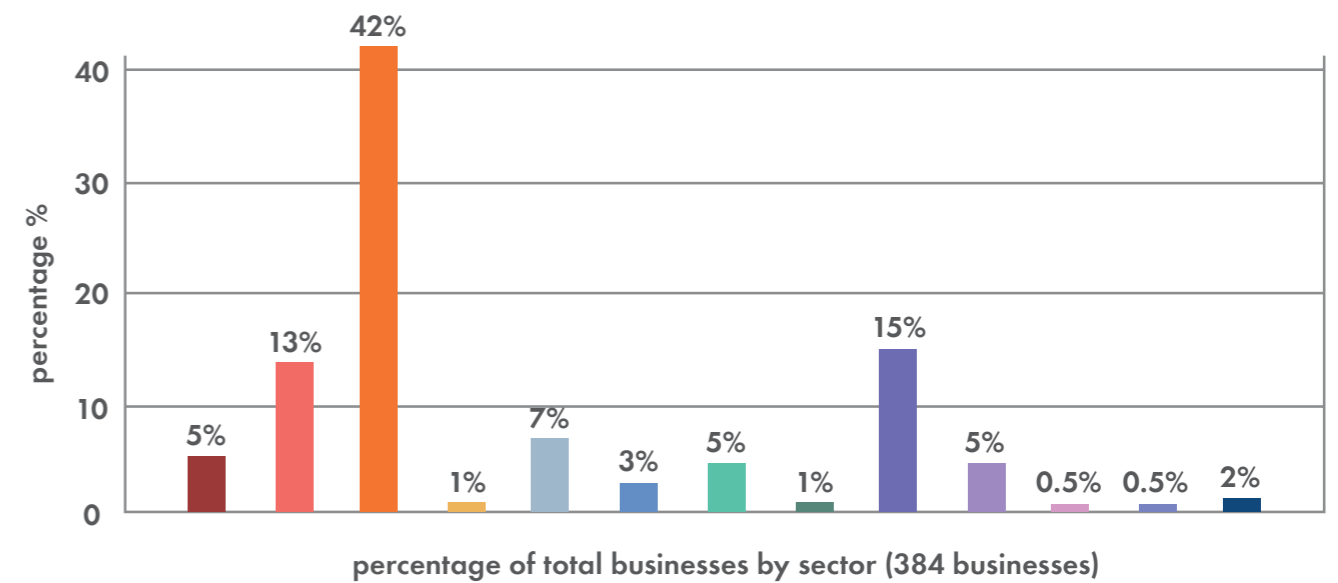
**5.7% vacant units**



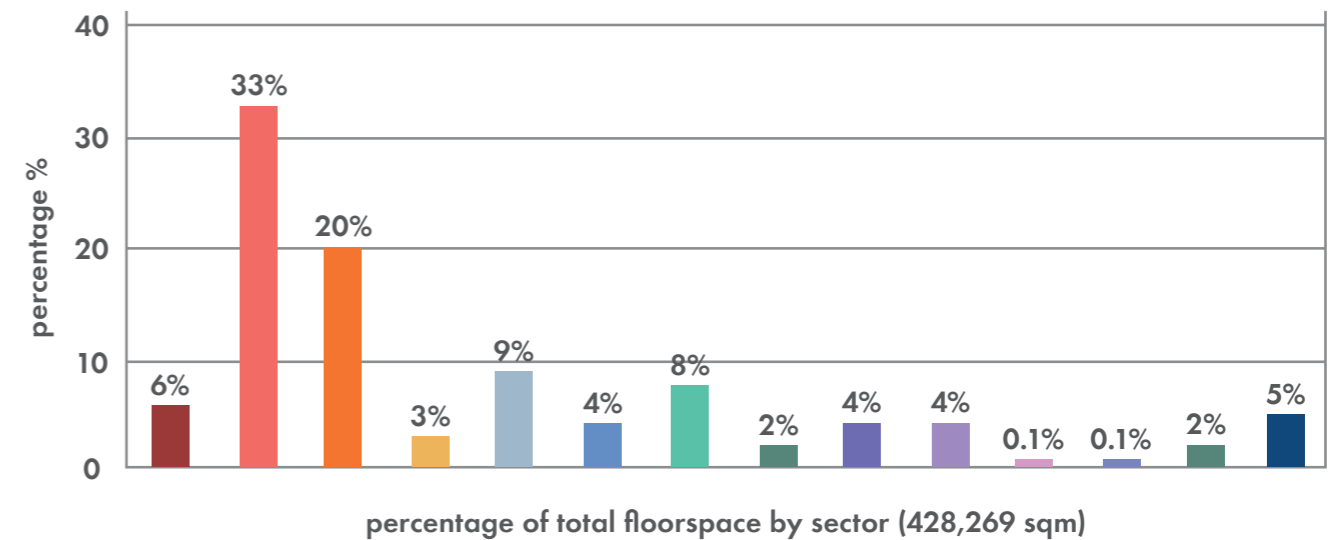
**More than 200 businesses located areas e-marked for redevelopment**



**More than 1/4 of jobs within food related sector**



Source: Industrious Ealing Southall audit, 2022. By We Made That.

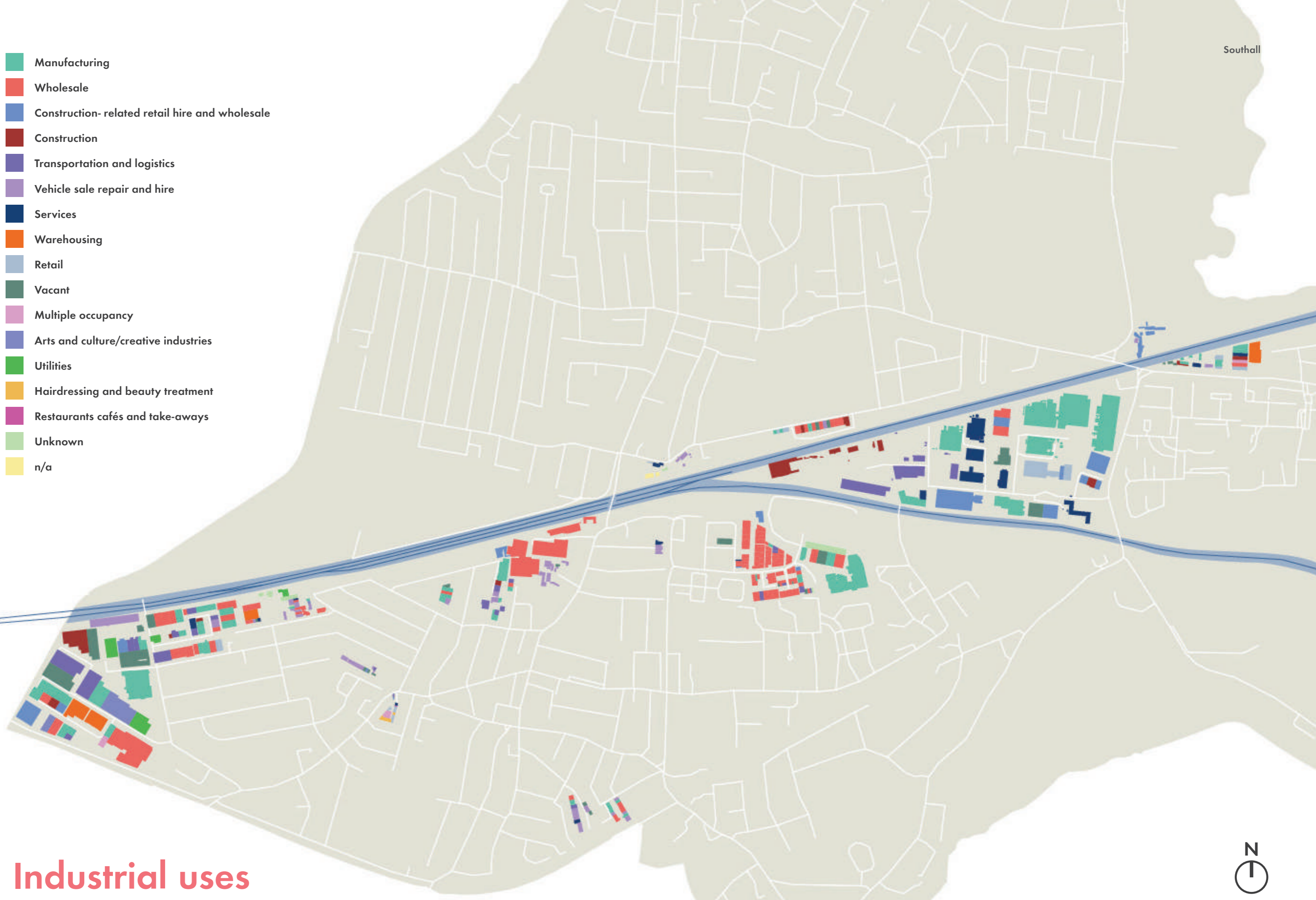


Source: Industrious Ealing Southall audit, 2022. By We Made That.



- Manufacturing
- Wholesale
- Construction- related retail hire and wholesale
- Construction
- Transportation and logistics
- Vehicle sale repair and hire
- Services
- Warehousing
- Retail
- Vacant
- Multiple occupancy
- Arts and culture/creative industries
- Utilities
- Hairdressing and beauty treatment
- Restaurants cafés and take-aways
- Unknown
- n/a

Southall



# Industrial uses



# Evolving context

# Major Developments

- 1.9 Southall is undergoing transformation through the consent of a number of major planning applications found across the area. These applications are creating a built form and character in Southall, one that is typically higher density and taller than has is often associated with Southall's tightly packed streets of Victorian urban terraces.
- 1.10 These developments are coming forward for a number of strategic priorities driving change in Southall and across London. These can be summarised under the following headings:

## Housing shortage and population growth

- 1.11 There is a nationally-recognised housing shortage owing to a chronic under delivery of new homes that has failed to keep pace with a growing population. The impact of this housing shortage has been acutely felt in London, where the population has grown by over 2 million people in the past 20 years.
- 1.12 Indeed, Southall's population growth has been greater than the wider borough of Ealing as a whole, with this having grown 1% compared with 0.3% respectively in the past 10 years. This means new homes need to be built across London and Ealing to meet housing targets set by the government and the London Plan (2021).

## Opportunity Area designation and arrival of the Elizabeth Line

- 1.13 A large part of Southall was designated an Opportunity Area in the 2011 London Plan, identifying a potential for 9,000 new homes and 3,000 new jobs by 2041. The designation was driven by a combination of a number of former industrial brownfield sites and the planned arrival of the Elizabeth Line at Southall Station.

- 1.14 Investing in transport infrastructure to create a better connected city means more places can accommodate higher residential densities. Put simply, the arrival of the Elizabeth Line to Southall means more people can live in the area, alongside similar scales of investment in other social infrastructure and amenities.

## Local Plan policies

- 1.15 Southall forms a key part of Ealing Council's spatial strategy within both their current adopted Local Plan and emerging new Local Plan review. Policies will continue to target growth towards Southall due to its town centre and associated services and amenities; planned improvements to public transport including the Elizabeth Line; and its collection of remaining brownfield sites lined up for transformation.
- 1.16 Whilst the majority of opportunities for development in Southall may well be delivered or close to being delivered in the next few years, a number of wider improvements can be planned to best support the lives of existing and new communities (residential and employment based) in the area.
- 1.17 A suite of studies and engagement events are being prepared to understand the needs of local people and the ways in which development can contribute towards improvements - either in the way they are designed; the uses and activities the support; or the improvements they directly deliver or indirectly fund e.g. through affordable housing, Community Infrastructure Levy



The majority of new development is concentrated within and around the Southall Opportunity Area (marked in orange below) and former industrial land surrounding Southall Station.

### Southall Waterside



Redevelopment of the Southall Gasworks site. The scheme includes the provision of 20 ha of public realm and parkland and 3,750 new homes (30% affordable) in a range of different sizes and tenures.

**Status:** Under construction  
**Applicant:** Berkley Homes  
**Architect:** John Thompson & Partners

-  **3,750**  
new homes max.
-  **25,300**  
sqm flexible commercial space
-  **20,050**  
sqm retail space  
(included in flexible commercial space)
-  **14,090**  
sqm community uses
-  **9,650**  
sqm hotel space

### Southall Park Avenue



The scheme includes the erection of five housing blocks between 5 and 25 storeys. Also proposed is commercial / community floorspace, possible uses being flexible workspace, cafe, childcare facilities and gym uses. There will also be improvements to landscaping such as new open space, play areas and vegetation to improve urban greening.

**Status:** Pending consideration  
**Applicant:** Paragon Asra Housing  
**Architect:** Gort Scott, Maccreanor Lavington

-  **513**  
new homes
-  **1,131**  
sqm flexible commercial space

### The Arches (Merrick Place)



The development of 4 towers, ranging from 15 to 23 storeys and comprising residential units, office and commercial space. The development includes the construction of a boundary wall along railway line, new access arrangements, as well as additional landscaping, play and amenity space.

**Status:** Planning approved  
**Applicant:** Network Homes  
**Architect:** Cartwright Pickard

-  **575**  
new homes
-  **2,549**  
sqm flexible commercial space

### Margarine Works



The scheme ranges in height from 4 to 27 storeys which increase in scale towards the north. This predominantly residential development also includes office / community space, a hotel, commercial space and parks and amenity space.

**Status:** Planning approved  
**Applicant:** Montreaux Developments  
**Architect:** Assael Architecture

-  **2,083**  
new homes
-  **10,076**  
sqm flexible commercial space
-  **2,688**  
sqm retail space
-  **7,199**  
sqm hotel space

### Quayside Quarter



The masterplan is located on the former Honey Monster factory site along Bridge Road. Alongside 1997 homes, the development will provide a creative industrial hub, light industrial units, commercial space and high quality public realm.

**Status:** Planning approved  
**Applicant:** Galliard Homes  
**Architect:** EPR Architects

-  **1997**  
new homes
-  **2,275**  
sqm flexible commercial space
-  **964**  
sqm community uses
-  **27,873**  
sqm business / industrial space

### Southall Sidings



Scheme includes 7 building blocks ranging from 4 to 16 storeys, a series of connected public and semi-public spaces and associated landscaping and vegetation. The entrance space to the development will include a number of internal amenity spaces, including a gym and workspace.

**Status:** Planning approved  
**Applicant:** Connected Living London  
**Architect:** Assael Architecture

-  **460**  
new homes

### Havelock Estate Regeneration



The masterplan will provide 922 new homes, of which 53% will be affordable. The scheme will be predominantly low-rise, with a few larger scale apartment buildings ranging from 6 to 8 storeys. Included in the masterplan is a new community centre, commercial units, canalside park and associated public space.

**Status:** Under construction  
**Applicant:** Catalyst Housing  
**Architect:** Pollard Thomas Edwards



### The Green



The scheme will provide a mixture of new homes, retail and business space, alongside public realm improvements and a high quality pedestrian environment linking to public and green spaces.

**Status:** Awaiting legal agreement  
**Applicant:** Peabody  
**Architect:** Hunters



### Malgavita Works



The Malgavita Works site is located within the wider Middlesex Business Park area. The scheme will provide 302 residential units along with commercial and retail space, a small cafe, a gym, an undercroft car park and landscaped public realm.

**Status:** Under construction  
**Applicant:** Aria Properties Limited  
**Architect:** Barton Wilmore



### Former Esso Petrol Site



The scheme involves the redevelopment of the former Esso Petrol Filling station site, to the east of Merrick Road. The buildings range from 16 to 19 storeys and comprises residential units, commercial floorspace and landscape, play and amenity space.

**Status:** Planning approved  
**Applicant:** Redrow  
**Architect:** Boon Brown



### Kings House



King's House comprises a 22 storey tower containing 77 homes and ground floor commercial and cafe space and upper floor office space.

**Status:** Planning approved  
**Applicant:** TR Suterwalla & Sons  
**Architect:** Barton Wilmore



### Land South of 80-92 High Street



The scheme will provide 125 affordable homes along with public and semi-private communal amenity space and will re-provide the existing on-site public car park.

**Status:** Planning approved  
**Applicant:** MacKenzie Homes  
**Architect:** Stockwool



### Toplocks, Glade Lane



The development proposes 26 new affordable homes and associated landscaping, access and parking. Also proposed is a new footbridge over the Maypole Dock canal, creating a pedestrian and cycle link.

**Status:** Planning approved  
**Applicant:** Catalyst Housing  
**Architect:** Conran + Partners

 **26**  
new homes

### Parkview



Located to the rear of the Red Lion Pub on High Street, the scheme provides both new homes and flexible commercial space divided between three blocks, 4 - 14 storeys high. Included in the masterplan are new amenity spaces which will also help in developing a connection to the neighbouring Southall Park.

**Status:** Planning approved  
**Applicant:** Red Lion Development  
**Architect:** Starc Architects

 **150**  
new homes

 **592**  
sqm flexible commercial space

### 80-92 High Street



The construction of a 4 storey building comprising residential units and ground floor retail space. The proposals also include the re-location of Southall Market onto the land in front of the Lidl supermarket, facing High Street.

**Status:** Awaiting decision  
**Applicant:** Unknown  
**Architect:** Stockwool

 **9**  
new homes

 **136**  
sqm flexible commercial space

### Land at Beaconsfield Road

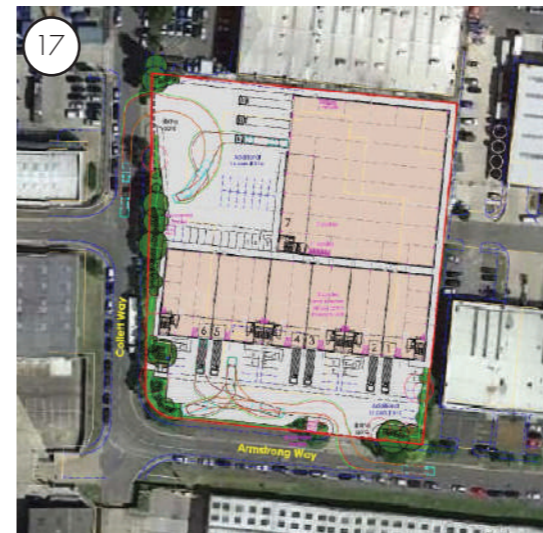


Located on the former Southall College site, the scheme includes 118 new apartments along with shared amenity space and 35% affordable housing.

**Status:** Completed  
**Applicant:** Stonegate Homes  
**Architect:** ECE Architecture

 **118**  
new homes

### 40 Armstrong Way

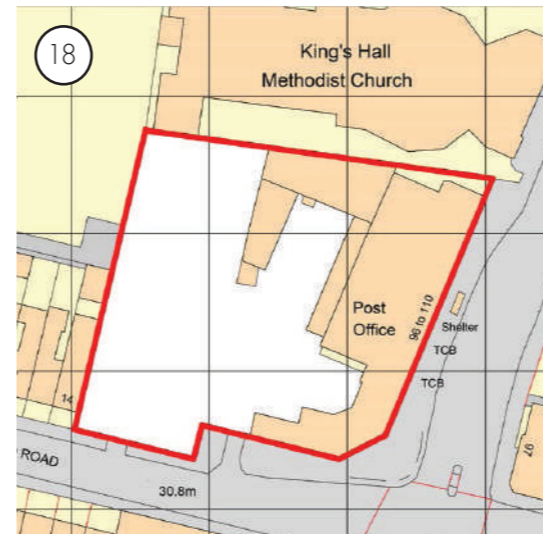


Located on Armstrong Way and Collett Way, the scheme involves the development of 7 single-storey industrial units.

**Status:** Planning approved  
**Applicant:** Universities Superannuation Scheme Limited  
**Architect:** Ian C King Associates Architects

 **5,390**  
sqm business / industrial space

### 96 South Road



This mixed use development comprises new residential homes along with 10 commercial ground floor units and car and cycle parking.

**Status:** Planning approved  
**Applicant:**  
**Architect:** GA&A Design

 **41**  
new homes

 **1,622**  
sqm flexible commercial space

LBE to share info

Collett Way

19



The proposed scheme comprises of a single building consisting of outboard offices. The site will be accessed off Collett Way via the existing access point and will also provide designated parking areas.



7,241 sqm flexible commercial space

**Status:** Pending consideration  
**Applicant:** Bridge industrial  
**Architect:** UMC Architects



Hambourgh Tavern

20



The proposed development comprises a new 15 storey block and 4 storey block along The Broadway in Southall.



580 sqm flexible commercial space

Along with 161 hotel rooms, a bar/restaurant and conferencing space will be provided.

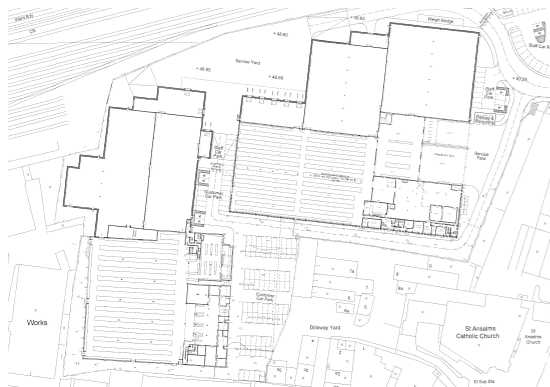


7465 sqm hotel space

**Status:** Planning approved  
**Applicant:** Hayre Group Limited  
**Architect:** Claridge Architects



Site Of TRS Wholesale



The existing Cash and Carry building will be demolished and replaced by a new structure of the same use, a new warehouse building is also proposed.



7,247 sqm business / industrial space







**Status:** Conditional consent  
**Applicant:** T R Suterwalla and Sons  
**Architect:** Robertson Francis Partnership



Photography from Southall town centre

# Land use summary

## Key







-  **Pre-Sept 2020** - Class C3 uses  
**Post-Sept 2020** - Class C3 uses
-  **Pre-Sept 2020** - Class A1 - A5, B1 uses  
**Post-Sept 2020** - Class E(b), E(c), E(g)uses
-  **Pre-Sept 2020** - Class A1 uses  
**Post-Sept 2020** - Class E(a) uses
-  **Pre-Sept 2020** - Class D1, D2 uses  
**Post-Sept 2020** - Class E(d), E(e), E(f), F(1), F(2) uses
-  **Pre-Sept 2020** - B2, B8  
**Post-Sept 2020** - B2, B8
-  **Pre-Sept 2020** - Class C1 uses  
**Post-Sept 2020** - Class C1 uses



	NAME	New Homes	Flexible Commercial Space (sqm)	Retail Space (sqm)	Community Uses (sqm)	Business / Industrial Space (sqm)	Hotel Space (sqm)
01	Southall Waterside	3,750	25,300	20,050 <small>(inc. in flexible commercial space)</small>	14,090	-	9,650
02	Southall Park Avenue	513	1,131	-	-	-	-
03	The Arches	575	2,549	-	-	-	-
04	Margarine Works	2,083	10,076	2,688	-	-	7,199
05	Quayside Quarter	1997	2,275	-	964	27,873	-
06	Southall Sidings	460	-	-	-	-	-
07	Havelock Estate Regeneration	922	840	-	280	-	-
08	The Green	564	2,502	-	420	-	-
09	Malgavita Works	302	423	-	538	-	-
10	Former Esso Petrol Site	166	117	-	-	-	-
11	Kings House	77	488	-	-	-	-
12	Land South of 80 - 92 High Street	125	-	-	-	-	-
13	Toplocks, Glade Lane	26	-	-	-	-	-





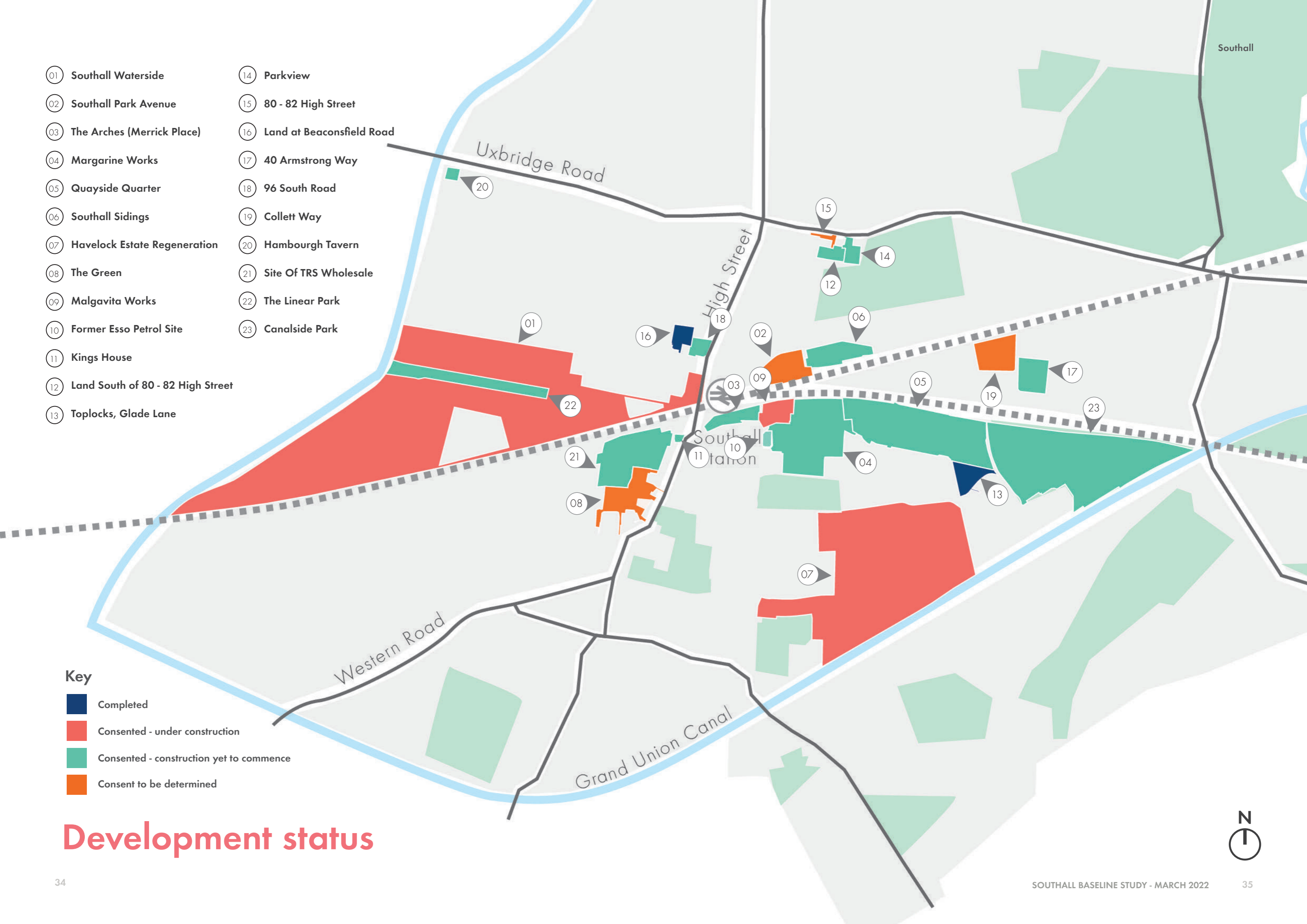
							
	NAME	New Homes	Flexible Commercial Space (sqm)	Retail Space (sqm)	Community Uses (sqm)	Business / Industrial Space (sqm)	Hotel Space (sqm)
14	Parkview	150	592	-	-	-	-
15	80 - 82 High Street	9	-	136	-	-	-
16	Land at Beaconsfield Road	118	-	-	-	-	-
17	40 Armstrong Way	-	-	-	-	5,390	-
18	96 South Road	41	1,622	-	-	-	-
19	Collett Way	-	7,241	-	-	-	-
20	Hambourgh Tavern	-	580	-	-	-	7,465
21	Site Of TRS Wholesale	-	-	-	-	7,247	-
	<b>TOTAL</b>	<b>11,878</b>	<b>55,736</b>	<b>22,874</b>	<b>16,292</b>	<b>40,510</b>	<b>24,314</b>

- 01 Southall Waterside
- 02 Southall Park Avenue
- 03 The Arches (Merrick Place)
- 04 Margarine Works
- 05 Quayside Quarter
- 06 Southall Sidings
- 07 Havelock Estate Regeneration
- 08 The Green
- 09 Malgavita Works
- 10 Former Esso Petrol Site
- 11 Kings House
- 12 Land South of 80 - 82 High Street
- 13 Toplocks, Glade Lane
- 14 Parkview
- 15 80 - 82 High Street
- 16 Land at Beaconsfield Road
- 17 40 Armstrong Way
- 18 96 South Road
- 19 Collett Way
- 20 Hambourgh Tavern
- 21 Site Of TRS Wholesale
- 22 The Linear Park
- 23 Canalside Park

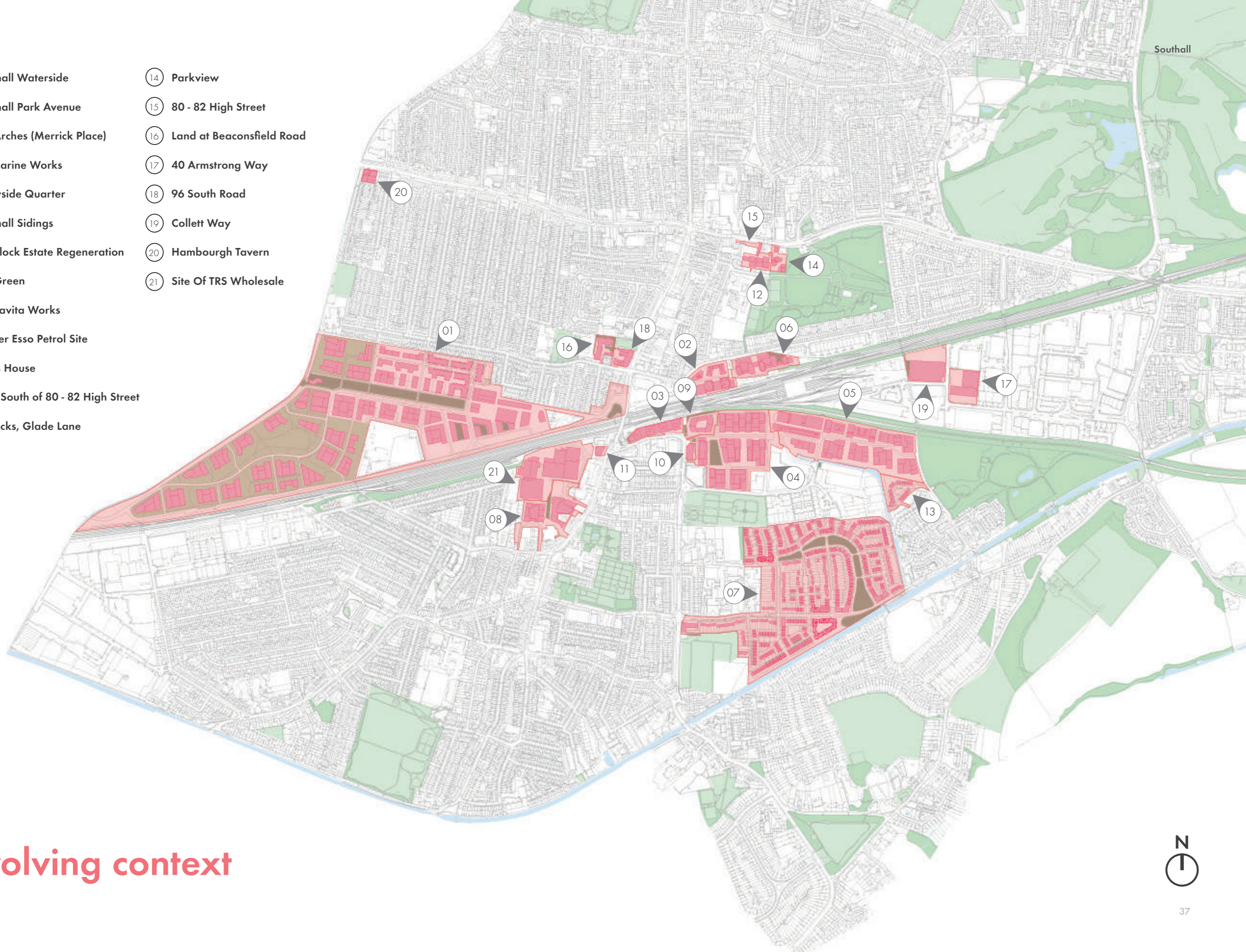
**Key**

- Completed
- Consented - under construction
- Consented - construction yet to commence
- Consent to be determined

# Development status



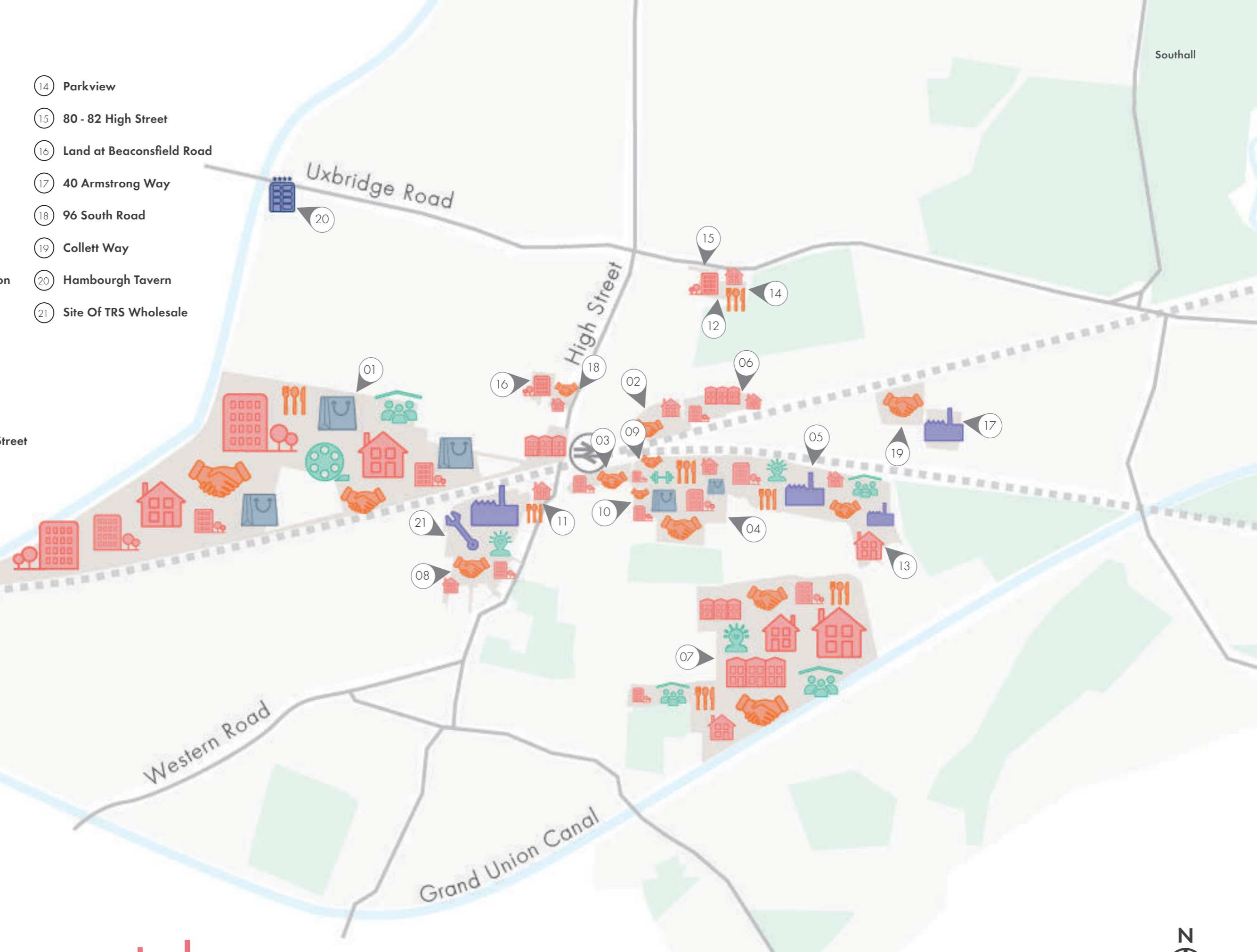
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# Evolving context



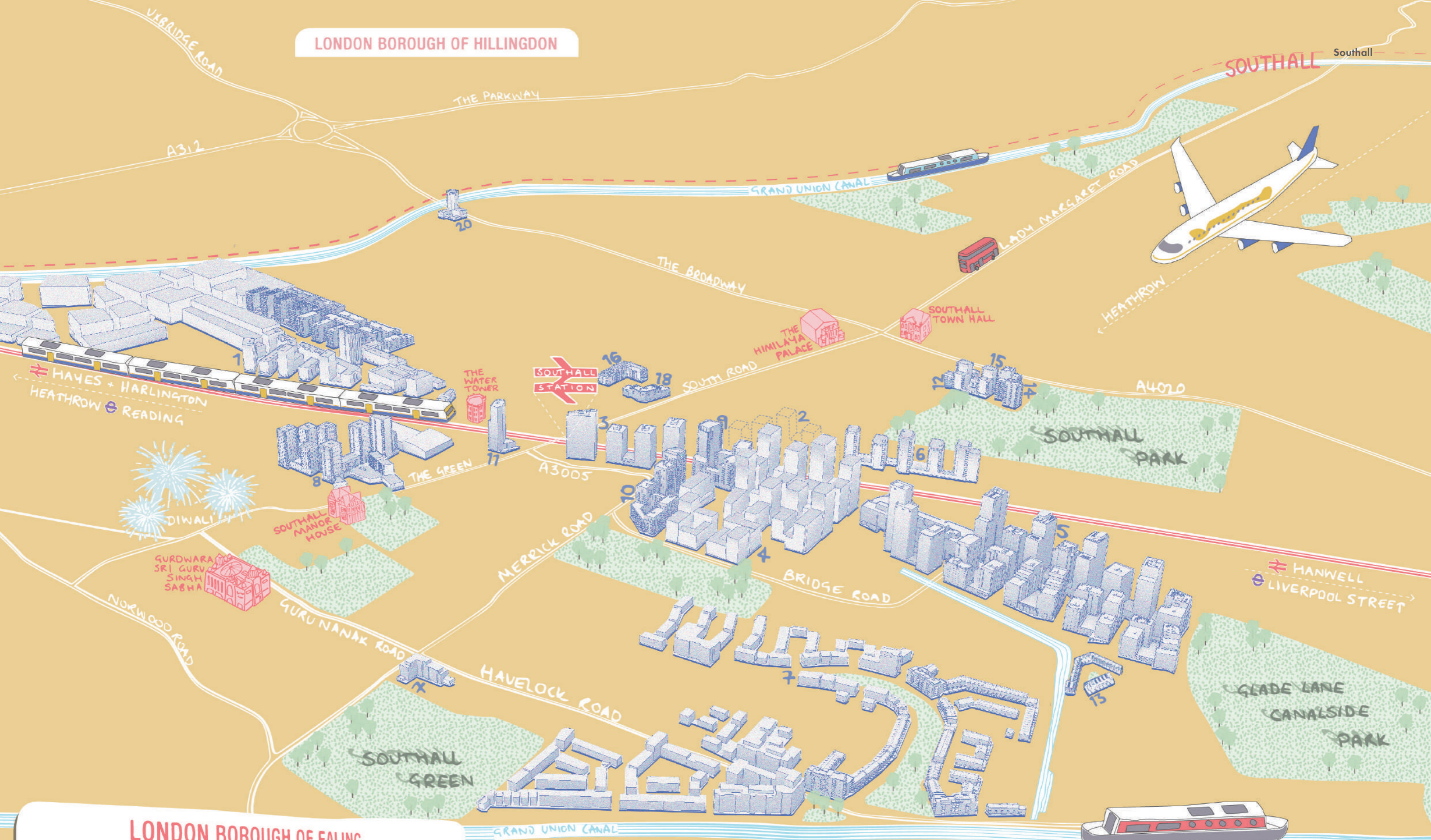
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# Land use concept plan



LONDON BOROUGH OF HILLINGDON



LONDON BOROUGH OF EALING

Welcome to Southall

ਜੀ ਆਇਆਂ ਨੂੰ, ਸਾਉਥਹਾਲ

- |                              |                                    |                              |
|------------------------------|------------------------------------|------------------------------|
| 1 Southall Waterside         | 7 Havelock Estate Regeneration     | 13 Toplocks, Glade Lane      |
| 2 Southall Park Avenue       | 8 The Green                        | 14 Parkview                  |
| 3 The Arches (Merrick Place) | 9 Malgavita Works                  | 15 80 - 82 High Street       |
| 4 Margarine Works            | 10 Former Esso Petrol Site         | 16 Land at Beaconsfield Road |
| 5 Quayside Quarter           | 11 Kings House                     | 18 96 South Road             |
| 6 Southall Sidings           | 12 Land South of 80-82 High Street | 20 Hambourgh Tavern          |



