

Southall Employment Audit 24.06.2022



Working with

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Revisions tracker

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Overview

Renowned for its bustling town centre and strong South Asian identity, Southall has also long been a site of industrial production and employment, serving the needs of its local population, a growing capital city as well as markets further afield. It is home to a cluster of designated industrial land and pockets of industrial activities, running contiguous with the rail line and Grand Union Canal and products of cheap land values and good connectivity. Today, the area continues to support key industrial activities and specialisms.

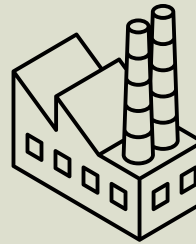
This study takes a closer look at the type of businesses, buildings and jobs that make Southall a productive place. It identifies the key challenges and opportunities in different industrial locations and for different sectors, and highlight key recommendations to consider by Ealing Council and its partners to ensure that Southall continues to grow as a successful productive and inclusive place.



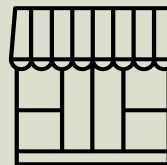
384 businesses



4,171 jobs



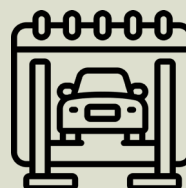
**428,269 sqm
of employment
floorspace**



**5.7% of vacant
units**



**More than 1/4 of
jobs in the food
sector**



**Strong
specialisms in
construction,
vehicle repair
and wholesale**



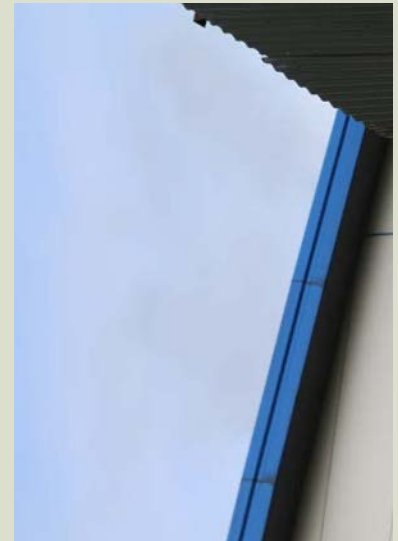
Beaver Industrial Estate



Collett Way, Great Western Industrial Estate



PCH Group, Collett Way (Great Western Industrial Estate)



Dilloway Industrial Estate



Beaver Industrial Estate



W Hanson, Uxbridge Road

01

Introduction

Purpose and Methodology
Context

Purpose and methodology

On-the-ground research has informed this study which assesses Southall local business base and gathers evidence of its role in the local and London-wide economy.

The London Borough of Ealing has commissioned a detailed employment study of Southall. This study aims to create a better economic understanding of the area's industrial activities, and will be used as evidence to inform the review of the Local Plan and other strands of work in the context of Southall's regeneration. This includes the wider Industrious Ealing commission, which seeks to develop and test approaches to protect, intensify, create and re-imagine some of Ealing's key industrial sites towards strengthening Ealing's position as a key provider of industrial floorspace in London.

This work utilises a mix of qualitative and quantitative research methods to provide a careful and nuanced understanding of the area's local economy. At its core, the study aims to collate the most up-to-date and accurate business activity information through on-site primary research. In order to do so, observational assessments, detailed audits and discussions with local businesses have been carried out within Southall industrial areas. The study also outlines the planning and commercial context of the Southall Opportunity Area (OAPF) in order to capture the current and upcoming changes that affect workspace provision and the collective local economy. This allows for a better understanding of the type of workspaces, both being lost or created, in the context of Southall regeneration.

This study should be understood as a snapshot in time, capturing uses and premises in operation in early 2022.

Observational research and data gathering

The audit was carried out over 3 weeks from January to February 2022. The different industrial estates across Southall were mapped to establish different study areas. A door-to-door assessment was then carried out to gather basic information on each business, focusing on the following data:

- Name of business
- Address
- Units occupied
- Primary activity
- Type of space occupied
- Number of employees (or estimated number where unknown)

In addition to the data gathered during site visits, businesses were allocated a Standard Industrial Category (SIC) code based on primary business activity. These codes were used, in conjunction with on-the-ground knowledge of operations to group businesses into 'business activity' categories which have been used to analyse the prevalence of different sectors across the study sites and as the basis of comparison with other industrial sites in London.

Additionally, each building within the study boundaries was assigned a building type in order to better classify and understand the built form and urban fabric that host the range of businesses across the study site as well as to identify vacancy.

Detailed surveys

Alongside this comprehensive quantitative audit, researchers carried out a number of longer interviews with 20 businesses representing different business sizes, sectors of activity and designation statuses.

These interviews aimed to get a more detailed picture of the business activity, the number of employees, and the integration of the business within the wider economy in terms of customers, suppliers and other partnerships. Enquiries on the impacts of Covid-19 and Brexit were also made, leading to broader discussions on the main opportunities and challenges of local businesses today.

Definitions and categories used to categorise and map businesses are presented and explained in Appendix.

Context

Policy context and background evidence

The London Borough of Ealing is currently in the process of reviewing its Local Plan. Its development is driven by the cross-cutting themes of creating good jobs, tackling the climate crisis and fighting inequality, aligning with Ealing Council's key priorities.

Southall is earmarked as an Opportunity Area in the London Plan (2021), identifying its capacity to deliver 9,000 homes and upwards of 3,000 jobs. The emerging local plan will therefore be required to clearly set out how the borough will encourage and deliver Southall's growth potential and support development which creates employment opportunities and housing choice for Londoners. Of particular importance will be the proactive management of industrial, logistics and related uses essential to the functioning of the economy in Ealing and London as a whole, in line with national and London-wide policy.

At present, there is little evidence detailing the specific activities undertaken across Southall's industrial land. Previous studies have tended to focus on the supply and demand of industrial workspace across the borough or provided high-level data and forecast of economic growth across West London.

The West London Employment Land Evidence (GL Hearn, 2021 update) reveals that Southall hosts a key industrial corridor for Ealing, containing the largest concentration of industrial stock above 1,000 sqm in the Borough. It finds that Southall's only Strategic Industrial Land (SIL), the Great Western Industrial Estate, comprises around 6% of the Borough industrial floorspace and characterizes the SIL as dominated by service (catering and hospitality) and distribution with some trade counter occupiers. It also identifies the International Trading Estate as contributing a majority share of the supply of Locally Significant Industrial Sites (LSIS) space in Ealing and as an important supplier to Heathrow. According to the report, Southall's industrial land has enjoyed substantial rental growth over the past 20 years.

A number of relevant concurrent studies are being undertaken to support Ealing's Local Plan process. A Town Centre Health Check including character analysis, consumer surveys and floorspace provision is considering opportunities for improvements to the

accessibility and wider quality of Ealing Town Centre. An Affordable Workspace Study is informing LBE's strategy regarding flexible and SMEs workspaces across the borough. It has thus far revealed a borough specialisation in food manufacturing, wholesale and transport and storage as well as future opportunities in construction activities and advertising and market research. It finds a high number of SMEs in computer programming, consultancy and related activities which are noteworthy in the context of workspace demand.

Finally, a survey of Southall town centre businesses has been undertaken simultaneously with this study (February 2022). It has revealed significant impacts of Covid-19 and Brexit on business climate. Businesses have been found to be suffering from a severe lack of footfall and the diversity of retail on offer has been shown to require a nuanced approach to support.

Development landscape

Southall is in a period of considerable change. The anticipated arrival of Crossrail has meant that Southall Station will be connected via the Elizabeth Line to Paddington in under 15 minutes. Southall Station has seen extensive renovations in preparation for of the new line including a new station entrance, ticket hall and footbridge.

The opportunities of Crossrail have quickened the pace of residential development in recent years and Southall was designated as an Opportunity Area in 2014. The expectation is that this area has the capacity to host significantly increased homes and jobs. In the new London Plan, Southall Town Centre is also identified as hosting a high residential growth potential and medium commercial growth potential.

Much of the anticipated development is coming through as major schemes, with a significant amount of new floorspace in the pipeline. Much of this is occurring within or adjacent to industrial land, some schemes even embracing the industrial heritage of this area in their branding and positioning. Significant sites with planning approval include Quayside Quarter, which will see the delivery of 1,997 new homes and creative industrial, light industrial and retail space and Havelock Estate, which will see 92,568sqm of housing delivered alongside commercial uses.

Designated as an Opportunity Area, Southall is subject to important changes with the planned delivery of 9,000 homes and 3,000 jobs, supported by the arrival of Crossrail.

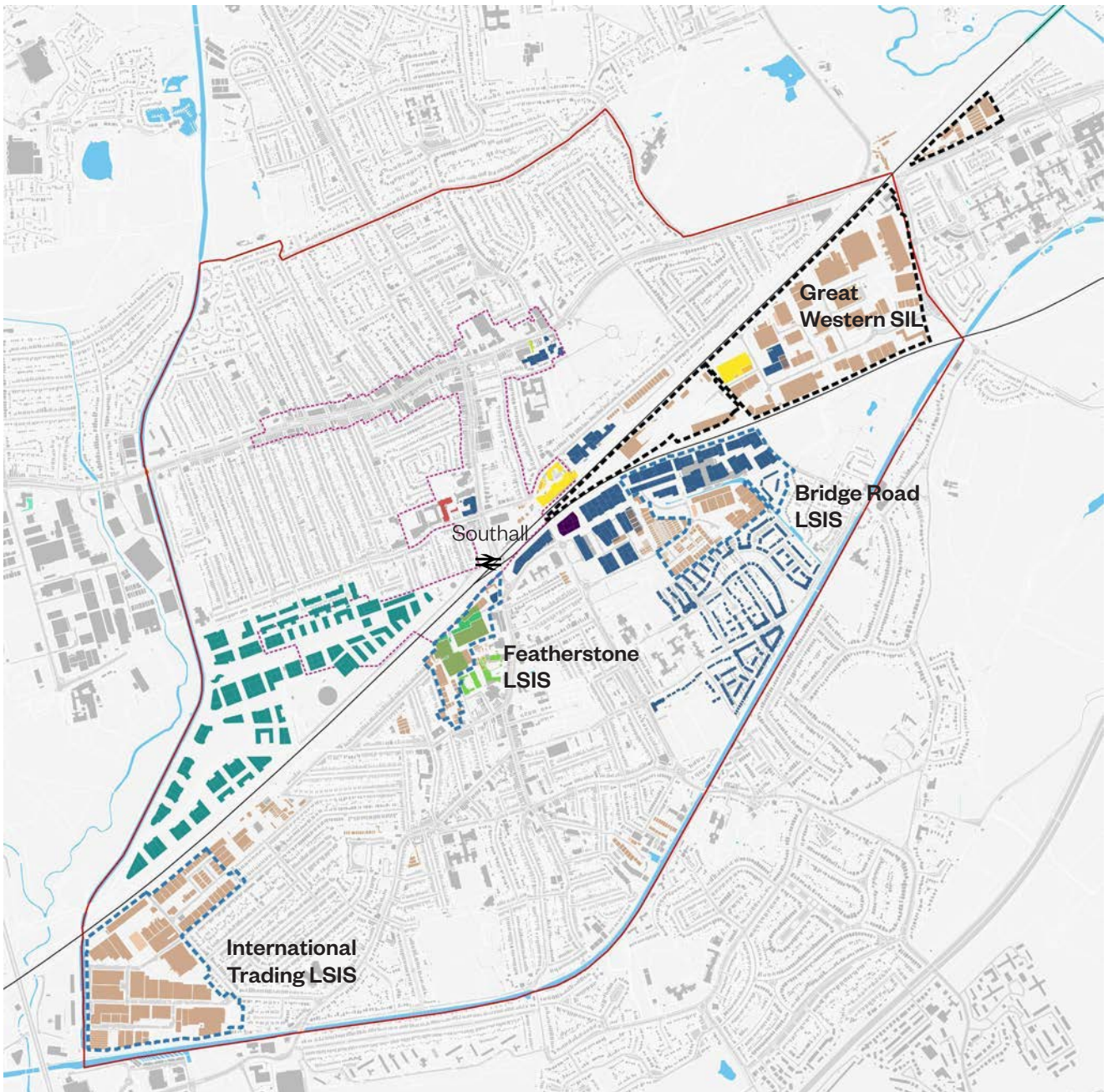
Key

Planning context

- Pending consideration
- Awaiting decision
- Awaiting legal agreement
- Conditional consent
- Phase 3 granted
- Planning approved
- Under construction
- Completed

- Southall Opportunity Area
- Town Centre
- SIL
- LSIS

- Surveyed areas



02

Overall audit findings

**Businesses and Sectors
Density**

Building Types

Vacancy

Cross-Borough Analysis

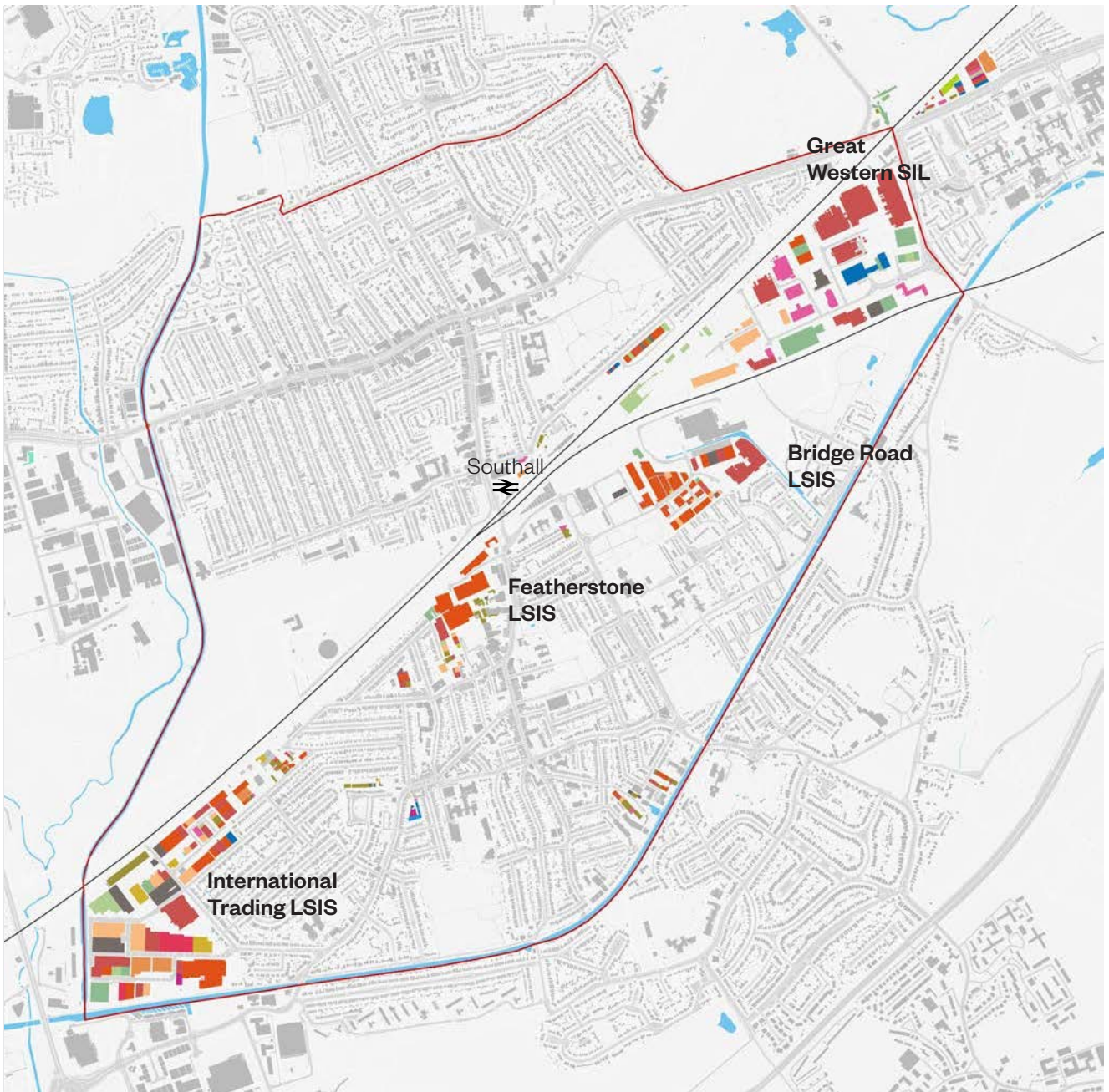
02. Overall audit findings

Southall's industrial activities are diverse. Food-related activities, vehicle repair services and wholesale are particularly prevalent.

Key: Business Sectors

- Manufacturing
- Wholesale and Warehousing
- Transportation and logistics
- Construction
- Construction-related
- Utilities
- Vehicle sale, repair and hire
- Retail and high street uses
- Restaurants, cafes
- Arts, creative industries
- Services
- Multi-occupancy
- Unknown
- Vacant

Southall Opportunity Area

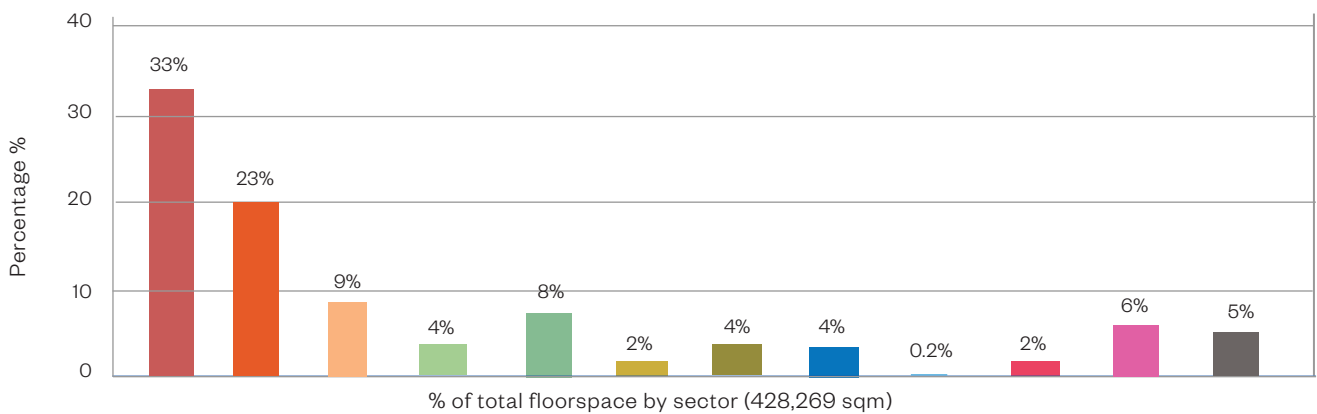
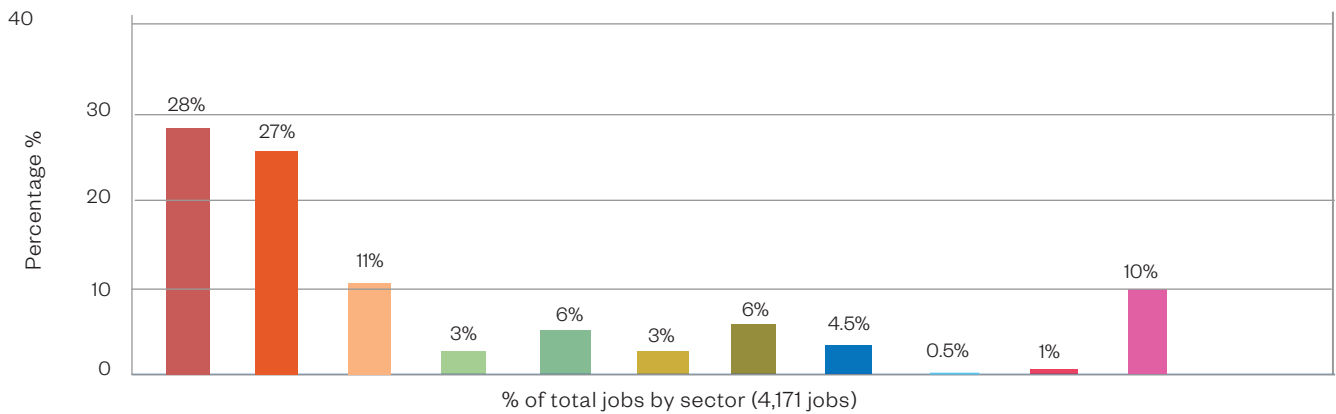
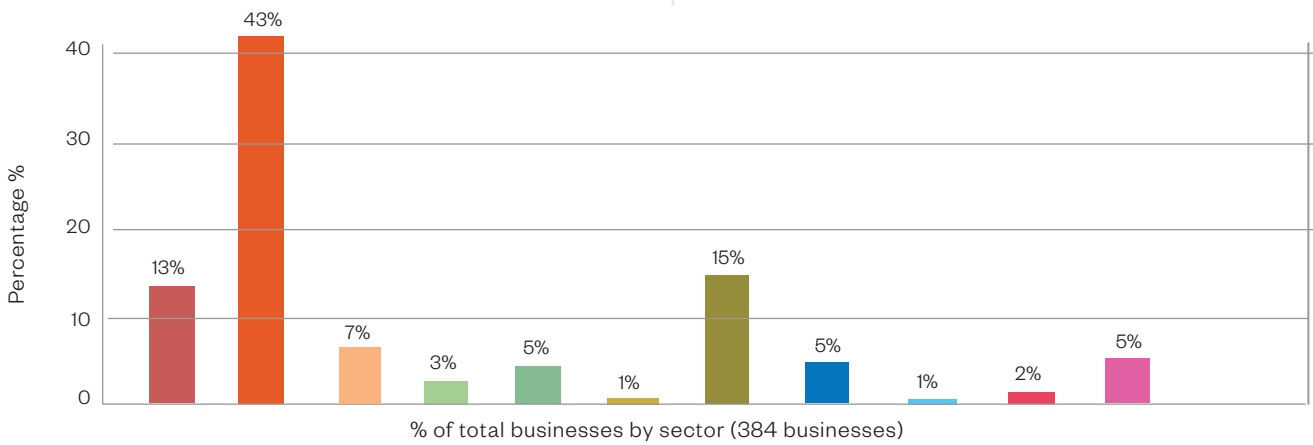


02. Overall audit findings

Industrial areas in Southall are home to a total of 384 businesses, 4,171 jobs and 428,269 sqm of employment floorspace.

Key: Business Sectors

- Manufacturing
- Wholesale and Warehousing
- Transportation and logistics
- Construction
- Construction-related
- Utilities
- Vehicle sale, repair and hire
- Retail and high street uses
- Restaurants, cafes
- Arts, creative industries
- Services
- Unknown
- Vacant
- Southall Opportunity Area



02. Overall audit findings



Manufacturing activities are diverse, ranging from food production, metal and woodwork manufacturing, glazing, and stonepolishing.



The **Wholesale and Warehousing** sector is made of a large number of food wholesalers as well as electronic devices and household goods wholesale businesses. The area is also home to a few fashion and textile wholesale businesses as well as a few storage spaces for high street clothing companies.



The **Transportation and Logistic** sector is mainly composed of freight and courier services and import/export businesses.



The **Construction** sector in Southall is mainly composed of small businesses and includes a number of building contractors, including kitchen and bathroom fitters, joinery specialists and carpenters. **Construction-related activities** include building supply retailers, construction vehicles hire as well as timber merchants.



The **Utilities** sector is made of two key recycling and waste management businesses (general waste and paper) located with the Brent Park Estate.

02. Overall audit findings



The **Vehicle sale, repair and hire** sector is mainly composed of small and micro car repair businesses providing a range of repair services, including MOTs.



Retail businesses are scarce in industrial areas but are occasionally found on non-designated sites. Retail activities seem to occur in businesses primarily identified as wholesalers/cash and carry businesses.



Restaurant and cafes can be found within Southall industrial stock. This is mainly take aways and fast food businesses catering for local workers.



Arts, culture and creative industries businesses include a large prop hire company, a recording studio and a video distribution company.



The **Services** category is a broad category made of a range of different activities from funeral, taxi, travel, and legal services, to removal and dry cleaning services.

02. Overall audit findings

At an average density of 70 employees/ha, industrial sites are operating at a slightly higher employment density than the London average for industrial land.

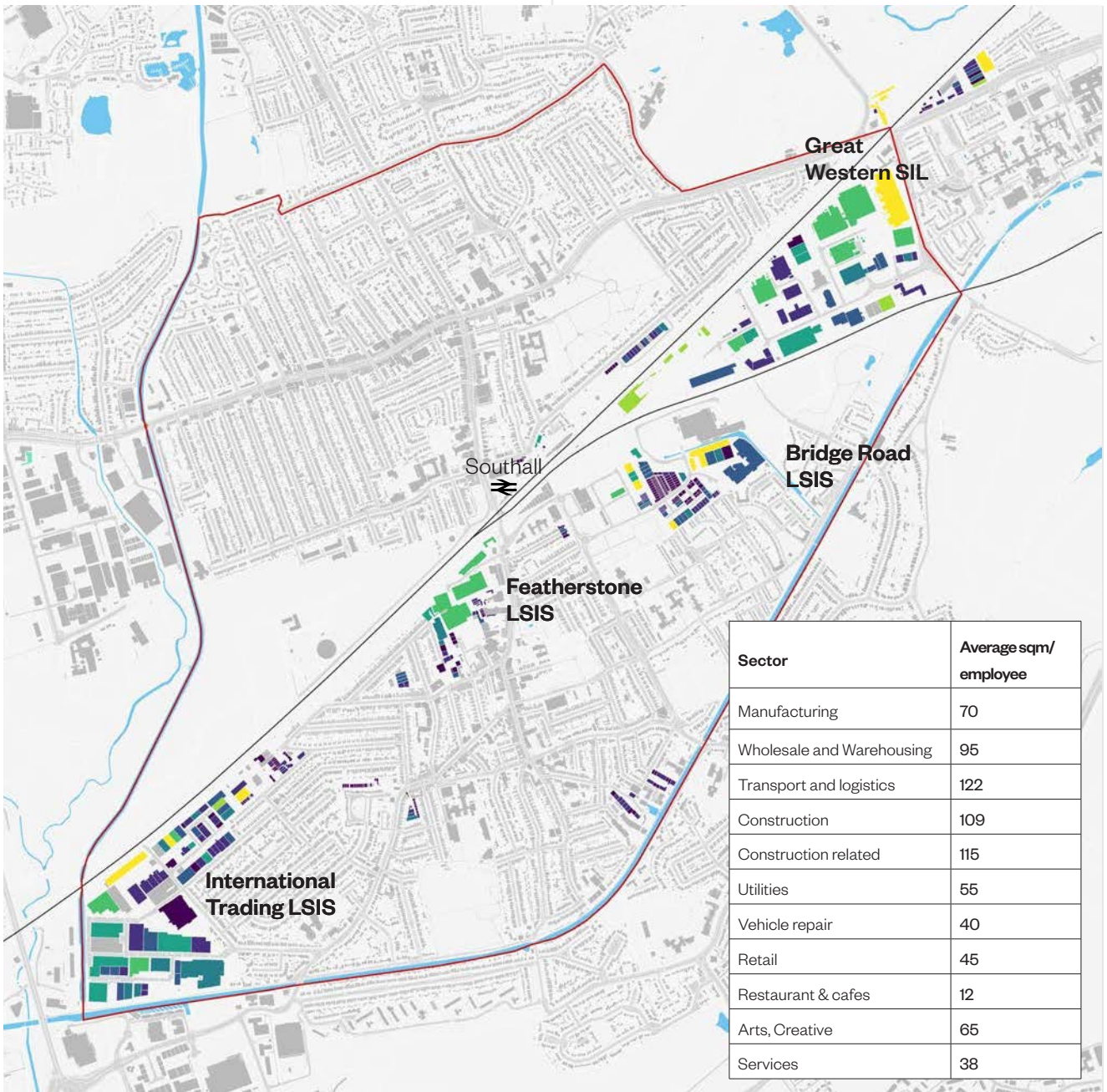
Key: Employment density

- > 280 sqm/employee
- 240-280 sqm/employee
- 200-240 sqm/employee
- 160 - 200 sqm/employee
- 120 = 160 sqm/employee
- 80 - 120 sqm/employee
- 40 - 80 sqm/employee
- < 40 sqm/employee

Southall Opportunity Area



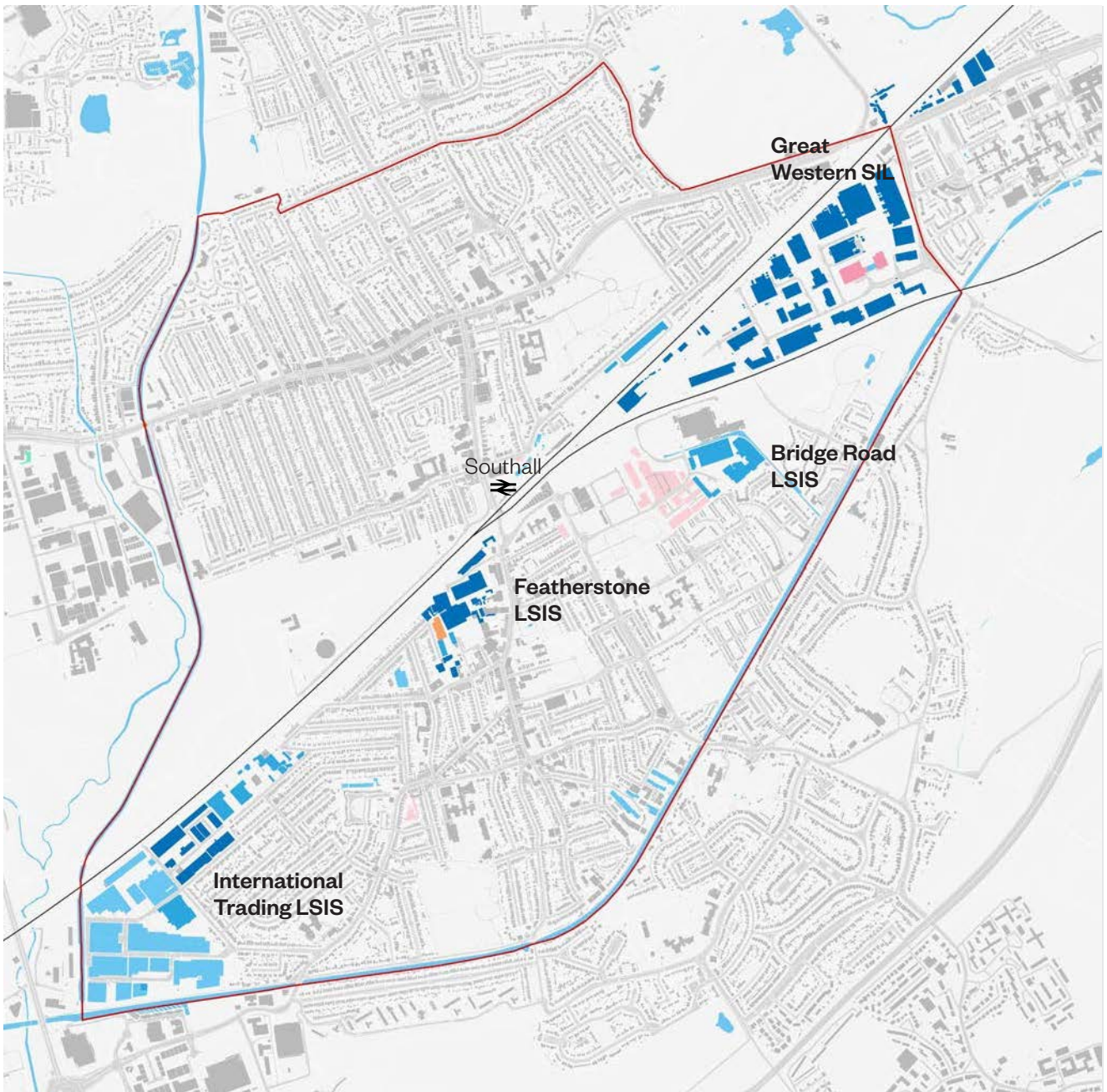
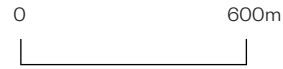
0 600m



The overall quality of stock is average. While new developments in Southall have multiplied in the past 5 years, the vast majority of industrial sites pre-date 2005 and have lacked investment.

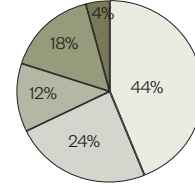
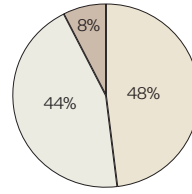
Key: building type

- Post-1945 industrial building
- Post-1990 industrial building
- Post-2005 industrial building
- Office building
- Retail/wholesale development
- Small retail unit
- Southall Opportunity Area



02. Overall audit findings

6% of the units and 5.5% of the industrial floorspace are vacant. This is slightly below what is estimated to be a 'healthy' vacancy friction rate. 4%



Vacant units x quality

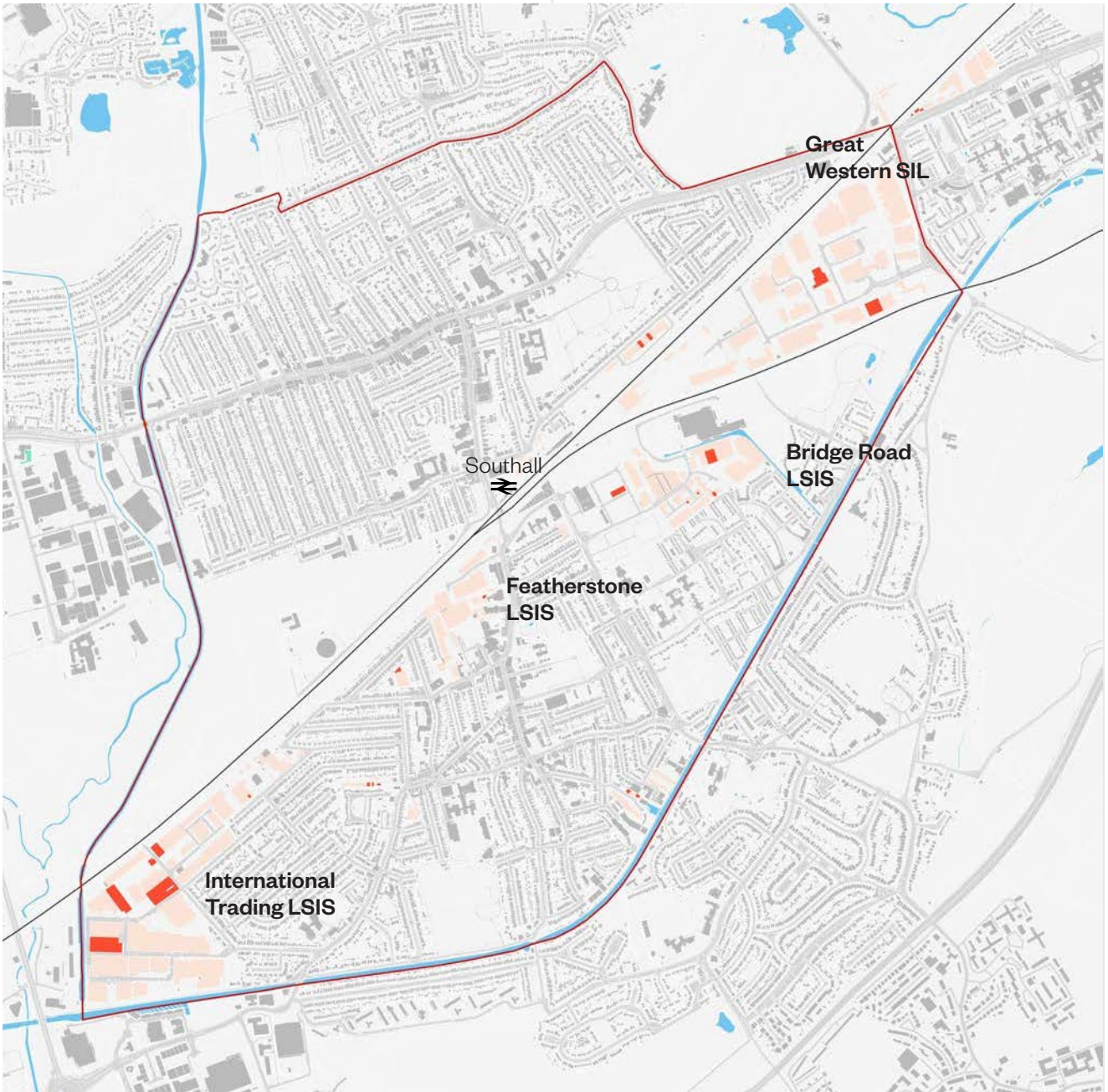
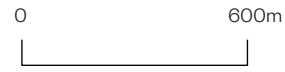
- Poor quality building
- Average quality building
- Good quality building

Vacant units x size

- < 150 sqm
- 150-500 sqm
- 500-1500 sqm
- 1500-5000 sqm
- > 5000 sqm

Key

- Vacant
- Other
- Southall Opportunity Area



02. Overall audit findings

Cross-borough analysis

In order to understand the composition and strategic role of the study site in relation to London, it is useful to compare Southall industrial areas with other well-known industrial clusters located within the Greater London Area: Purley Way (PW), Thamesmead (TM - LB Greenwich/Bexley), Surrey Canal Road & New Cross Gate (NXG - LB Lewisham) and Old Kent Road (OKR - LB Southwark).

Sectors	Southall 2022	PW 2021	TM 2020	NXG 2019	OKR 2019	Southall 2022	PW 2021	TM 2020	NXG 2019	OKR 2019
	% businesses					% jobs				
Manufacturing	13%	11%	24%	11%	14%	28%	9%	42%	8%	10%
Utilities	1%	3%	1%	1%	3%	3%	3%	1%	2%	4%
Vehicle sale and repair	15%	15%	10%	5%	4%	6%	11%	5%	3%	2%
Construction	8%	15%	11%	5%	5%	9%	9%	21%	3%	4%
Wholesale	42%	8%	11%	4%	7%	26%	6%	8%	2%	7%
Transport and storage	8%	9%	4%	6%	6%	12%	21%	2%	3%	22%
Services	5%	14%	28%	30%	23%	10%	12%	14%	44%	25%
Retail	5%	14%	2%	15%	16%	4%	14%	3%	10%	12%
Restaurants/cafes	0.5%	3%	0%	16%	11%	0.5%	3%	0%	7%	5%
Arts, Culture, Leisure and Faith	2%	8%	6%	8%	11%	1%	8%	4%	17%	9%
Vacancy	5%	5%	5%	6%	16%	-	-	-	-	-

03

Southall Industrial Areas

**Great Western SIL
International Trading LSIS
Featherstone LSIS
Bridge Road LSIS
Non-Designated Sites**

Great Western SIL

Overview

The Great Western Industrial Park is the only SIL in Southall, located to the north east of the district. A section of the estate is located outside the Southall Opportunity area, close to the neighbouring district of Hanwell.

Workspace

There is a notable contrast between the main section and the easternmost section of the site, the former featuring mostly well-maintained buildings and large employers, and the latter being dominated by smaller independent businesses and a lower-quality building stock

Traffic congestion within the estate was mentioned as a major issue by surveyed employers. Safety concerns were also raised regarding the subway between Park Avenue and Collett Way, used by local employees and visitors to access the site

Employment

The SIL concentrates the majority of large businesses in Southall (over 50 employees), with a higher proportion of businesses head quartered outside Southall. A variety of sectors are found across the site, including food manufacturing, transport and logistics, as well as a cluster of large-scale retailers mostly specialised in construction

Key figures

- 41 businesses
- 1,239 jobs
- 172,000 sqm of employment floorspace



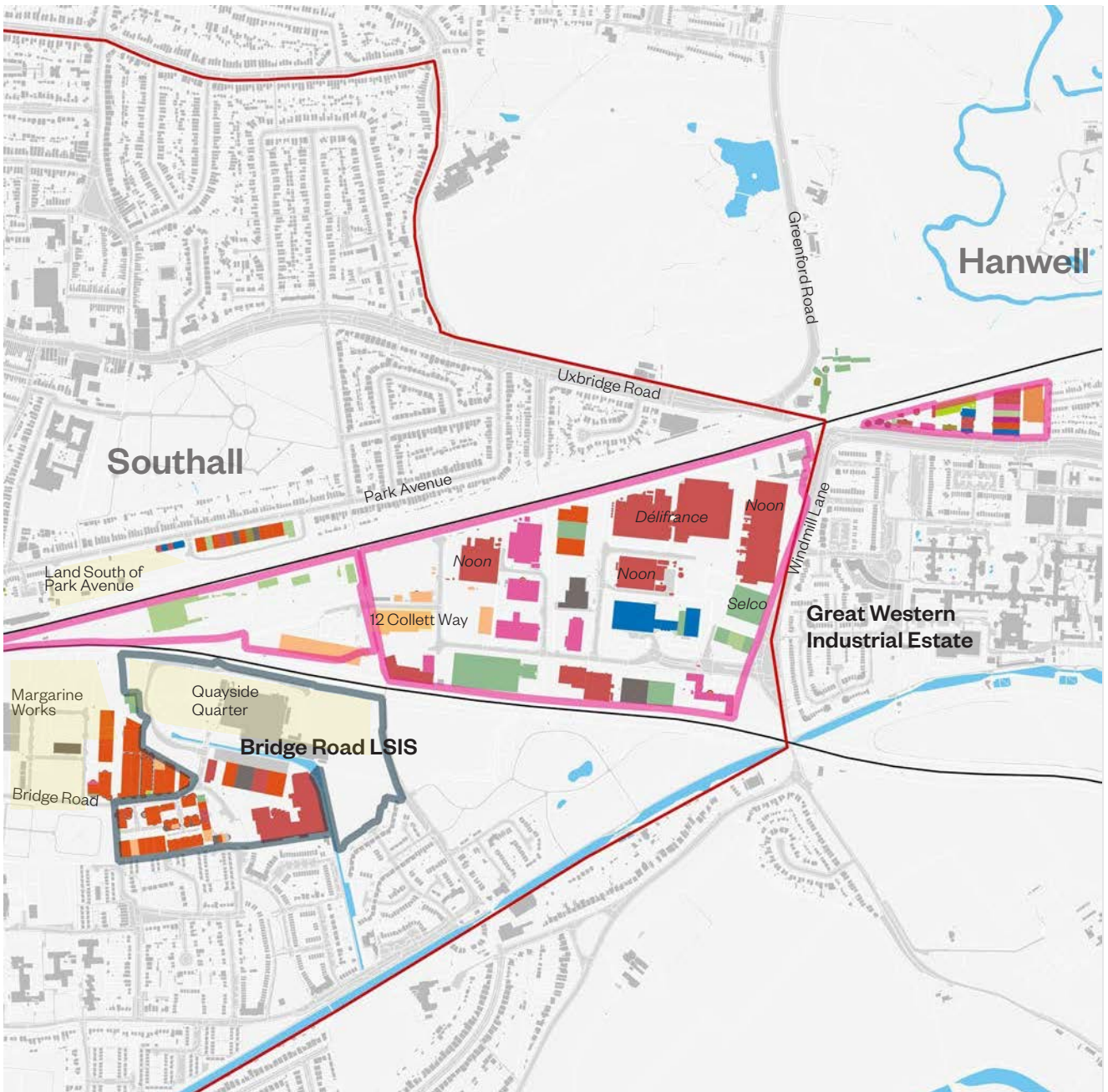
Collett Way, Great Western Industrial Estate

03. Southall industrial areas

Great Western SIL is the only SIL in Southall, concentrating many of the district's largest employers.

Key: Business Sectors

- Manufacturing
 - Wholesale and Warehousing
 - Transportation and logistics
 - Construction
 - Construction-related
 - Utilities
 - Vehicle sale, repair and hire
 - Retail and high street uses
 - Restaurants, cafes
 - Arts, creative industries
 - Services
 - Multi-occupancy
 - Unknown
 - Vacant
- Southall Opportunity Area
 - SIL
 - LSIS
 - Forthcoming development



Great Western SIL

Strengths

Overall quality of stock

The western portion of the SIL comprises several large, well-maintained industrial buildings and warehouses dating primarily from the 1980s and 1990s. These buildings accommodate a relatively diverse range of activities including food manufacturing, logistics, construction-related manufacturing and hire and laundering. Business owners surveyed report that the existing stock functions well for their needs.

Accessibility

Located close to Uxbridge Road, one of Ealing's two main axes, the SIL provides good road access to Central London, where many businesses report customers to be located.

Great Western is also located between Southall and Hanwell stations, and close to Uxbridge Road, which has several bus routes providing reliable public transport access for local workers and visitors.

Construction clustering

The southeastern section of SIL (off of Windmill Lane) concentrates retail counters for building supplies (Selco, Screwfix, Toolstation, etc). This is located in proximity to other construction-related activities including product manufacturing, tool hire, kitchen/bathroom fitting and furniture retail/rental. This allows for shared custom and makes Great Western SIL a hub for construction-related activities in Southall.

Weaknesses

Safety and quality of public realm

Businesses report concerns over the safety of their staff accessing Southall station, as the underpass from the estate to Park Avenue on its northern edge is poorly maintained, poorly lit and characterised as dangerous at night.


Uxbridge Road SIL triangle

The quality and character of the eastern portion of the SIL, lying across Uxbridge Road, contrasts strongly with that of the western portion.

With smaller and less well maintained units, this area suffers from poor signage and parking and traffic concerns as well as evidence of unlawful activities (e.g. nonconforming uses and unlicensed food and beverage activities).

Traffic disruptions

Occasional traffic disruptions (especially during roadworks) and issues surrounding parking impact servicing and deliveries, which is essential for the majority of businesses in SIL. Businesses report that the location of bus stops near the entrance to the Great Western estate on Windmill Lane impede access for large lorries.



Opportunities

Improved connectivity

The arrival of Crossrail to Southall and Hanwell will improve connectivity to both Central London and Heathrow, easing travel for employees, visitors and customers.

A distinctive industrial identity around food related activities

Great Western hosts both major food manufacturers such as Noon Products Ltd. and Delifrance in close proximity with some of their suppliers, who have specialisms as niche as vegetable dicing. This both emerges from and continues a rich tradition of food production in Southall. These spaces of production in the SIL lie cheek by jowl with spaces of consumption on the high street, including a concentration of both local and international South Asian restaurants. With surrounding schemes (including Quayside Quarter and Margarine Works) bringing thousands of new residents to the area, there is an opportunity to make more visible this distinctive local food ecosystem and celebrate Southall as a place of production.

Recent investment

A recent planning application for a new building at 12 Collett Way (awaiting decision) proposing significantly increased industrial floorspace evidences an active market and interest in investment in upgraded stock within this SIL. Great Western Industrial Estate, the western portion of the SIL, is relatively consolidated in terms of land ownership, with most of the estate held by just three landowners.



Threats

Recruitment challenges

Several large employers in the area report difficulties recruiting appropriate staff due to a shortage of relevant skills.

Supply chain disruptions

Several industries represented in the SIL are especially vulnerable to international supply chain disruptions. Brexit, fuel prices and other shifting international dynamics have impacted particularly heavily on the long-term security of food-related activities such international exporters and others relying on international suppliers and customers.

Non-conforming uses

The eastern portion of the SIL has seen the occupation of smaller units by non-industrial businesses, including retail and offices for sectors including online retail and social care.

Businesses occupying these premises had in some cases been priced out of Ealing Broadway and Acton and report this to be an ideal location due to the affordability of the spaces and the ease of access for staff who travel by car.

International Trading LSIS

Overview

The International Trading LSIS is located to the west of Southall and is bordered by the Grand Union canal. It encompasses the International Trading Estate, the Brent Road Industrial Estate and the Beaver Industrial Estate, as well as the Délifrance building. Two smaller industrial sites to the north east of the site, the Southall Enterprise Centre and the Balfour Business Centre, are currently non-designated but will be reintegrated to the LSIS in the emerging Local Plan.

Workspace

The majority of industrial buildings in the area were built between 1980 and 2005. The currently non-designated area has a concentration of lower-quality buildings, many operating as car repair businesses. The vacancy rate is currently higher than the Southall industrial estate average (11.2% vs. 5.7% of floorspace across study area).

Despite the limited integration of the site to the Southall road network, perception of public transport connectivity was mostly positive. Concerns were

raised by local businesses regarding traffic, safety (especially concerning thefts) and also food options for local employees.

Employment

The LSIS contains a variety of sectors including wholesale, manufacturing and logistics, but also creative industries (recording company, prop hire). Most businesses are independent, and some have operated in Southall for over a decade.

Key figures

- 57 businesses
- 1,215 jobs
- 122,000 sqm of employment floorspace

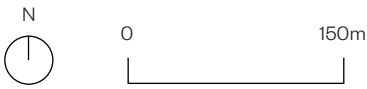


Trident Way, International Trading Estate

03. Southall industrial areas

**International Trading
LSIS includes a rich
mix of activities
including creative
industries not found
elsewhere in Southall.**

- Key**
- Manufacturing
 - Wholesale and Warehousing
 - Transportation and logistics
 - Construction
 - Construction-related
 - Utilities
 - Vehicle sale, repair and hire
 - Retail and high street uses
 - Restaurants, cafes
 - Arts, creative industries
 - Services
 - Multi-occupancy
 - Unknown
 - Vacant
 - Southall Opportunity Area
 - LSIS



International Trading LSIS



Strengths

A healthy mix of activity

International Trading LSIS hosts the most mixed sector composition of any study area, including representation from all sectors studied in Southall. This diversity suggests a potential future resilience to challenges and disruption.

Growing presence of creative industries businesses

Several creative activities not found elsewhere in Southall are located on the International Trading Estate. This includes prop hire company Classic Prop Hire and Passion Music Ltd., a recording studio.

Positive perception of accessibility

Despite limited integration of the LSIS due to physical barriers, business perception of accessibility for employees is generally positive and seen to be a benefit of locating here.



Weaknesses

Physical barriers and severances

With the physical barriers of the railroad to the north and canals to the west and south, International Trading LSIS experiences fragmented road accessibility, with significant burden on the eastern Brent Road, Scotts Road and Johnson Street to accommodate servicing and distribution lorries. This has previously contributed to the decision to de-designate Southall Business Park and Balfour Business Centre.

Ageing stock

Brent Road Industrial Estate, Beaver Industrial Estate, Southall Business Centre and Balfour Business Centre all feature dated and degraded mid-century building stock, some of which is vacant. Units on the southern portion of the SIL tend to be more recently updated and better maintained.

Safety concerns

Local businesses report their employees and customers are the targets of theft in and around the LSIS, creating an unpleasant environment.

Lack of amenities

Physically cut off from the high street or any food retail, there is a lack of amenities for employees within and around the LSIS.



Opportunities

Intensification and co-location

With many premises operating at medium to low employment density and given the wider need for upgraded stock, there is potential to spatially intensify employment in the LSIS or seek to attract more employment intensive industries.

With rents having the potential to exceed £12 per square foot, reasonably good transport access and a compatible occupier profile, International Trading LSIS also has favourable conditions to be considered for co-location with non-industrial use. Approximately 50% of the LSIS is under a single ownership which may facilitate opportunities to intensify.

Consolidation of LSIS

Southall Business Centre and Balfour Business Centre are currently undesignated but continue to host predominantly industrial activities, with recent planning proposals for industrial space on these estates demonstrating an active market. With undesignated floorspace anticipated to be lost through forthcoming development in Southall, the redesignation of these business centres should be pursued.

Improved public realm

The situation of the LSIS along the Grand Union Canal presents an opportunity to create an attractive public realm and enhanced environment for local workers.



Threats

Vehicle repair businesses at risk

Currently undesignated, Southall Business Centre and Balfour Business Centre are home to a cluster of vehicle repair and MOT services heavily reliant on longstanding relationships with local customers, suppliers and inexpensive space.

These businesses are typically considered to be challenging to relocate so new models should be considered.

Featherstone LSIS

Overview

The Featherstone LSIS is located in the centre of Southall, close to the main train station. Over half of the estate is occupied by TRS, a large cash and carry historically based in Southall. The rest of the designated area extends to the south west of TRS, which includes the Dominion Industrial Estate..

The Dilloway Industrial Estate, a non-designated site adjacent to the Featherstone LSIS, is earmarked for redevelopment (along with the central car park and other surrounding areas as part of a large mixed-use scheme).

Workspace

The estate is occupied mostly by TRS, a large Southall-based cash and carry established in 1959 based in a series of large buildings built more recently than the rest the Featherstone LSIS. The non-designated Dilloway Industrial Estate, containing mostly car repair services and generally based in low-quality building stock, is set to be replaced by a mixed-use development.

Employment

In addition to the cash and carry TRS, specialised in Asian food products, other activities found on site include manufacturing, wholesale and logistics, mostly based in small and medium-sized businesses.

Key figures

- 13 businesses
- 254 jobs (299 including Dilloway Industrial Estate)
- 33,600 sqm of employment floorspace



Dominion Road, Featherstone Industrial Estate

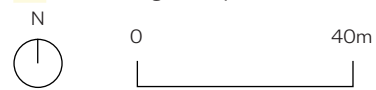
The Featherstone LSIS, dominated by TRS, will soon be adjacent to a large mixed-use development.

Key

- Manufacturing
- Wholesale and Warehousing
- Transportation and logistics
- Construction
- Construction-related retail, hire and wholesale
- Utilities
- Vehicle sale, repair and hire
- Restaurants, cafes and bistros
- Vacant

LSIS

Forthcoming development



Featherstone LSIS



Strengths

TRS as key employer and anchor business

TRS Cash and Carry dominates Featherstone LSIS and employs approximately 100 people. A longstanding local business, it also concentrates critical supply and customer chains for the local food manufacturing ecosystem as well as informal business relationships with other food manufacturing businesses in Southall.

A mixed-use environment

The designated LSIS and surrounding area is home of high visible commercial spaces with ground floor and high street presence, as well as pockets of industrial activities with limited visibility, making the area suitable and interesting for mixed uses.



Weaknesses

Poor stock quality

While TRS Cash and Carry's buildings are of relatively high quality with plans to invest in upgrades, the stock on Dominion Industrial Estate and Featherstone Industrial Estate are of relatively poorer quality.

Fragmented ownership

Outside of the TRS buildings, ownership on Featherstone LSIS is relatively fragmented among individual business owners, presenting a challenge to collective upgrade or intensification.

Limited visibility of industrial uses

The existing industrial spaces have a very limited visibility and high street presence. They are not seen as contributing positively to placemaking.



Opportunities

Fostering the development of local supply chain

Hosting a major employer in the food ecosystem as well as transportation and logistics companies important for the movement of products made in Southall, Featherstone LSIS extends the local culinary ecosystem. There is an opportunity to make this role visible as new businesses and residents occupy The Green.

With the proposals for The Green including commercial and potential restaurant and cafe uses, there are also opportunities for TRS to more directly benefit from new custom.



Threats

Loss of vehicle repair jobs

The Green development occurs on the site of the current Dilloway Industrial Estate, which comprises almost entirely vehicle repair businesses. These businesses accommodate an estimated 65 jobs, which are reliant on relationships with local customers, suppliers and inexpensive space.

Re-provision of suitable spaces for car related activities is challenging and often seen as not compatible with residential uses. While this is outside of the designated LSIS, opportunities to accommodate these businesses elsewhere in Southall should be further explored.

Bridge Road LSIS & Charles House

Overview

Bridge Road is the centre of a large industrial area encompassing both LSIS and non-designated industrial land. The western part of Bridge Road, formerly known as Middlesex Business Centre, has recently been converted into a large mixed-use development, with further development planned on remaining non-designated areas. The designated area is located to the east of Bridge Road.

Workspace

The area is composed of different industrial estates, including the Charles House building containing a shopping arcade with small units. Unlike other industrial sites in Southall, the area has a high number of visitors on a daily basis, at peak times comparable in footfall to the local high street.

The most common concern for local businesses relates to traffic congestion among Bridge Road, which is the only vehicular access to the area for workers, deliveries and visitors. This issue is reportedly aggravated by the lack of parking rules enforcement. Many businesses considered the local infrastructure inadequate, in terms of road or public transport

access but also regarding the limited range of food options and toilet facilities in the area

Employment

Bridge Road is a centre for wholesale and retail businesses specialised in phone accessories, home ware and clothing. These small businesses are based in Charles House, Grand Union Enterprise Park and Southall Enterprise Centre. The activities on Bridge Road Industrial Estate and the Bridge Business Centre are more similar to other LSIS activities in Southall, primarily manufacturing. Bombay Halwa (part of the Noon group) is head quartered on site.

Key figures

- 59 businesses
- 503 jobs
- 42,000 sqm of employment floorspace



Southall Enterprise Centre, Bridge Road

03. Southall industrial areas

Bridge Road includes several different industrial estates which see a growing dominance of wholesale activities.

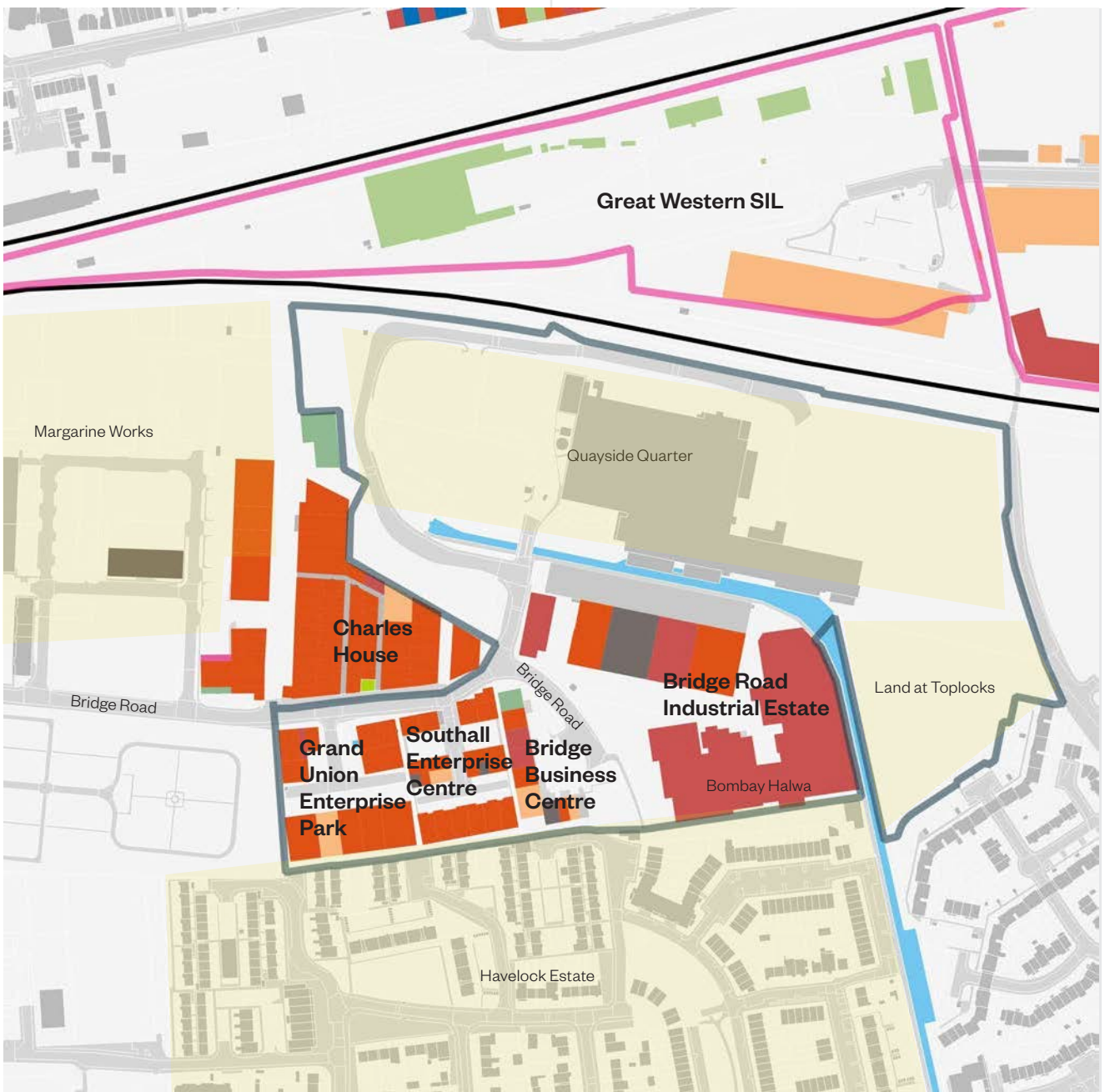
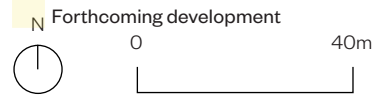
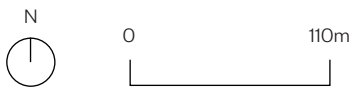
Key

- Manufacturing
- Wholesale and Warehousing
- Transportation and logistics
- Construction
- Construction-related retail, hire and wholesale
- Vehicle sale, repair and hire
- Multi-occupancy
- Vacant

fix key

- SIL
- LSIS

- Forthcoming development



Bridge Road LSIS & Charles House



Strengths

Flexible typologies

The diversity of workspace typologies on Bridge Road LSIS, including small retail units, industrial spaces and yards enables flexibility of use, as evidenced by the shift from manufacturing to wholesale activities on Grand Union Estate and Southall Enterprise Estate over last 10 years.

Street-level visibility and vibrancy

The western portion of the LSIS has notable street-level visibility, which is appropriate for the dominant wholesale sector. Bridge Road also sees footfall rivalling that of the local high streets, bringing vibrance and commercial potential to the area.

Presence of traditional industrial occupiers

The eastern portion of the LSIS concentrates some traditional industrial uses highly sensitive to location, important to the local economy and considered to be at-risk on London industrial land. This includes caterers and launderers as well as food manufacturing, a key sector for Southall.



Weaknesses

Road access and traffic

Bridge Road is the only road access to the LSIS and is reportedly frequently blocked by high volume of traffic and on-street parking despite double yellow lines, which are not enforced.

With poor public transport links and limited and unreliable parking, the LSIS is inaccessible for many wholesale customers, who tend to purchase large volumes of goods that are difficult to transport.

Poor maintenance

The LSIS public realm has significantly degraded due to poor maintenance of shared spaces. The failure of LBE to consistently manage waste on the site has also encouraged fly-tipping and placed a significant burden on local businesses, who have had to invest in private cleaning services.

Non-conforming uses

There is evidence that the wholesale uses in and around Bridge Road LSIS are operating as quasi-retail. Analysis of Google Earth footage shows a significant change in occupiers from a mix of more traditional industrial users such as caterers, launderers and food manufacturers to these uses over the past 10 years.

There have also been reports of other unlawful activities occurring on these premises. The nature of these businesses and contribution to the local economy should be further explored.



Opportunities

Links with high street

A surge in wholesale and retail activities in and around Bridge Road LSIS in the past 10 years suggests the area has potential to become a wholesale hub for the local area, especially for phone accessories, tobacco products and home ware.

Many customers of the wholesale businesses located here are businesses owners based on the high street, creating an opportunity to connect this area more visibly with the high street to highlight Southall's spaces of production and consumption.

Development landscape and opportunity for new employment floorspace

Residential developments at Quayside Quarter and Margarine Works will deliver over 4,000 new dwellings combined, with a potential to boost local customer base for wholesale, catering and launderers.

Margarine Works will provide 10,076 sqm. flexible commercial space, which may be compatible with absorbing wholesale and retail activities should relocation of these businesses be sought outside of Grand Union Estate and Southall Enterprise Estate.



Threats

Low resilience to global disruption

Turnover in wholesale occupiers in Grand Union Estate and Southall Enterprise Estate over the past five years has been high, as many businesses report struggles due to Covid-19, Brexit and supply chain disruption. This indicates that there should be some concern over the long-term resilience of these sectors. At the same time, many businesses attribute failure to lack of government support, reporting that due to the nature of their wholesale activities they were neither eligible for government support through Covid-19 nor allowed to remain open through lockdown. Should these wholesale uses be considered appropriate for the LSIS context, more targeted support for these kinds of businesses should be explored.

Erosion of LSIS

The redevelopment of the former Honeymonster site through the Quayside Quarter and Toplocks schemes have already contributed to the loss of industrial space within the LSIS serving the food manufacturing sector. The planned 27,873 sqm. of workspace is spread across B1 and B2 uses, leading to a potential net loss of industrial space should predominantly B1 be delivered. The protection of existing floorspace used by at risk traditional occupiers should therefore be prioritised and the re-designation of Charles House considered.

Congestion

With few road links into the LSIS, there will likely be increased congestion along Bridge Road as new development arrives. If wholesale activities expand in the LSIS and traffic from new residential communities increases, congestion will become unmanageable.

Non-designated sites

Overview

Other non-designated industrial estates are located across Southall, some of which are adjacent to designated industrial sites, others surrounded by more residential areas.

Workspace

Overall, non-designated industrial estate are in average to poor condition compared to designated industrial sites, with reported issues around inadequate infrastructure for industrial activities, particularly regarding road access and traffic. Due to their status, most of current non-designated industrial land is currently earmarked for future development. This poses a risk to existing industrial activities, some of which being nonetheless compatible with mixed-use developments.

Employment

Most remaining non-designated industrial land contains small independent businesses. Some of these estates are specialised in one particular sector. The Sussex Road industrial estate is for instance

dominated by car repair services, while the Waamo Shopping Centre contains a range of small shops specialised in Somali products. The other industrial estates usually contain a mix of different activities (especially manufacturing and wholesale), similarly to designated industrial sites in Southall.

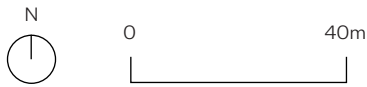
Key figures

- 225 businesses
- 964 jobs
- 56,000 sqm of employment floorspace
- 4,000 sqm planned loss



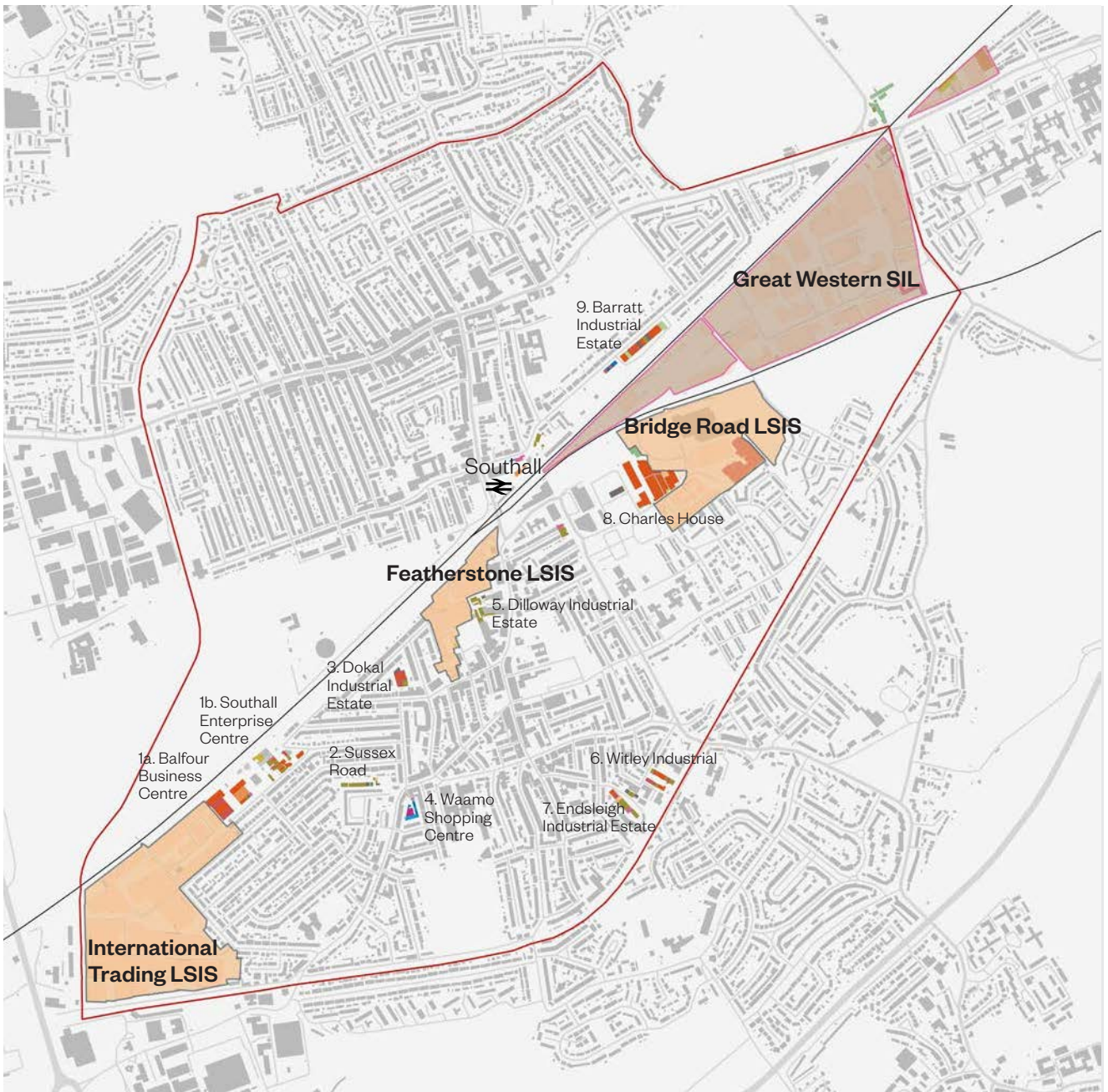
Dokal Industrial Estate

Non-designated sites, located across Southall, concentrate smaller businesses and is usually of poorer building stock condition than designated areas.



Key

- Manufacturing
- Wholesale and Warehousing
- Transportation and logistics
- Construction
- Construction-related
- Utilities
- Vehicle sale, repair and hire
- Retail and high street uses
- Restaurants, cafes
- Arts, creative industries
- Services
- Multi-occupancy
- Unknown
- Vacant
- Southall Opportunity Area
- SIL
- LSIS



Non-designated sites

1. Balfour Business Centre and Southall Entreprise Centre



- 54 businesses
- 270 jobs
- 13,760 sqm of floorspace

4. Waamo Shopping Centre



- 54 businesses
- 270 jobs
- 13,760 sqm of floorspace

7. Endsleigh Industrial Estate



- 10 businesses
- 50 jobs
- 2,500 sqm of floorspace

2. Sussex Road



- 14 businesses
- 47 jobs
- 1,420 sqm of floorspace

5. Dilloway Industrial Estate



- 15 businesses
- 45 jobs
- 2,500 sqm of floorspace

8. Charles House



- 75 businesses
- 200 jobs
- 8,790 sqm of floorspace

3. Dokal Industrial Estate



- 6 businesses
- 25 jobs
- 2,240 sqm of floorspace

6. Witley Industrial



- 9 businesses
- 56 jobs
- 2,030 sqm of floorspace

9. Barratt Industrial Estate



- 16 businesses
- 93 jobs
- 5,860 sqm of floorspace

04

Key Sector Findings

**Food-Related Activities
Vehicle Sale and Repair
Electronics Sale and Repair
Transport and Logistics**

Food manufacturing and wholesale

Food-related activity are found across most industrial areas in Southall and encompass a wide variety of business activities, sizes and building types. This sector is also strongly linked to high street activity in the area with multiple examples of local supply chains.

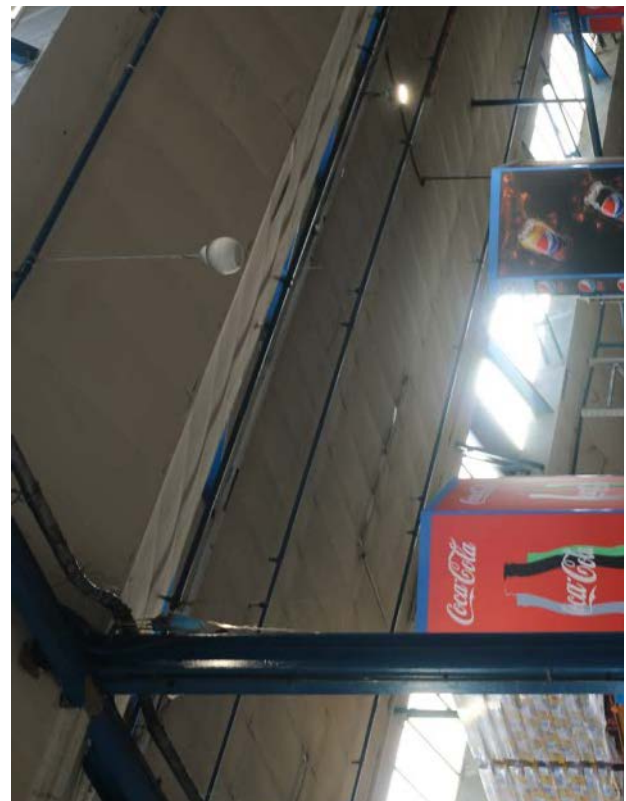
Businesses specialised in South Asian food and products feature prominently in this sector, a sign of Southall's history as a home for one of the largest Indian communities in the UK since the 1950s. This applies to small businesses but also to large employers such as Noon, a ready-meal manufacturer based in Southall since 1987.

Key figures

- 58 businesses
- 1,387 jobs
- 85% of independent businesses



TRS Cash and Carry, Featherstone Industrial Estate



Best Way, International Trading Estate

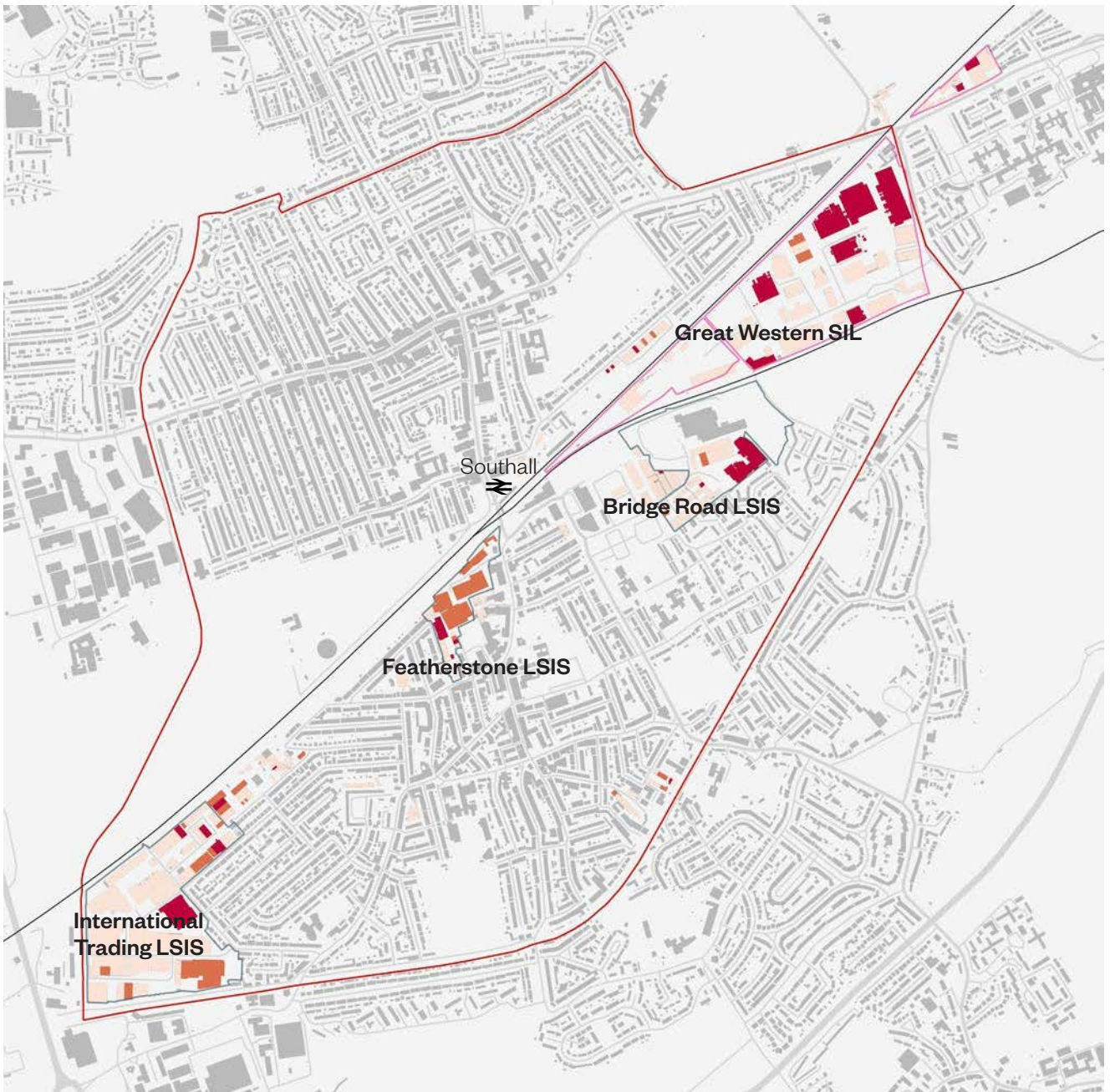
04. Key sectors findings

Food-related businesses constitute a major sector in Southall, covering a large range of activities with a focus on South Asian food and products.

Key

- Manufacturing (food, sale and catering)
- Food wholesale
- Restaurants, cafés and takeaways
- Other

Southall Opportunity Area



Vehicle sales and repair

Vehicle repair services are mainly operated by small businesses (under 10 employees). These businesses are often found in clusters, the largest ones being Sussex Road and Dilloway Industrial Estate. The majority of these businesses are found on non-designated industrial land. This suggests that the future of this sector in Southall is uncertain, as certain areas such as the Dilloway Industrial Estate are expected to be redeveloped in the near future.

Key figures

- 62 businesses
- 244 jobs
- 85% of businesses located on non-designated industrial land



JB Auto Crash Repairers, Dilloway Industrial Estate



Pameer Autos, Dilloway Industrial Estate

04. Key sectors findings

Vehicle sale and repair businesses are largely concentrated in certain non-designated estates and are particularly at risk of displacement.

Key

- Vehicle sale and repair
- Other

Southall Opportunity Area



Electronics wholesale and retail

This sector has emerged particularly in the past 10 years along Bridge Road. Largely based in small businesses (under 10 employees), many have reported to have been negatively impacted by Brexit and Covid-19, which has disrupted supply chains and footfall. This has caused a relatively high level of turnover among these businesses,

many of those surveyed having operated for under 12 months.

Key findings

- 59 businesses
- 237 jobs
- 40% of businesses located on non-designated industrial land



Bridge Road (Google Street View 2012)



Bridge Road (Google Street View 2022)

Electronics wholesale and retail businesses have surged in the past 10 years, clustered around Bridge Road.

Key

- Electronics wholesale and retail
- Other
- Southall Opportunity Area



Transport and logistics

Transport and logistics businesses can be found in most industrial estates across Southall. These range from large companies operating internationally such as DPD to smaller businesses based locally. This sector plays a key role in the supply chain of other businesses in Southall, some of which rely heavily on international freight (such as electronics or food wholesale).

Key findings

- 30 businesses
- 500 jobs
- 80% of businesses are independent



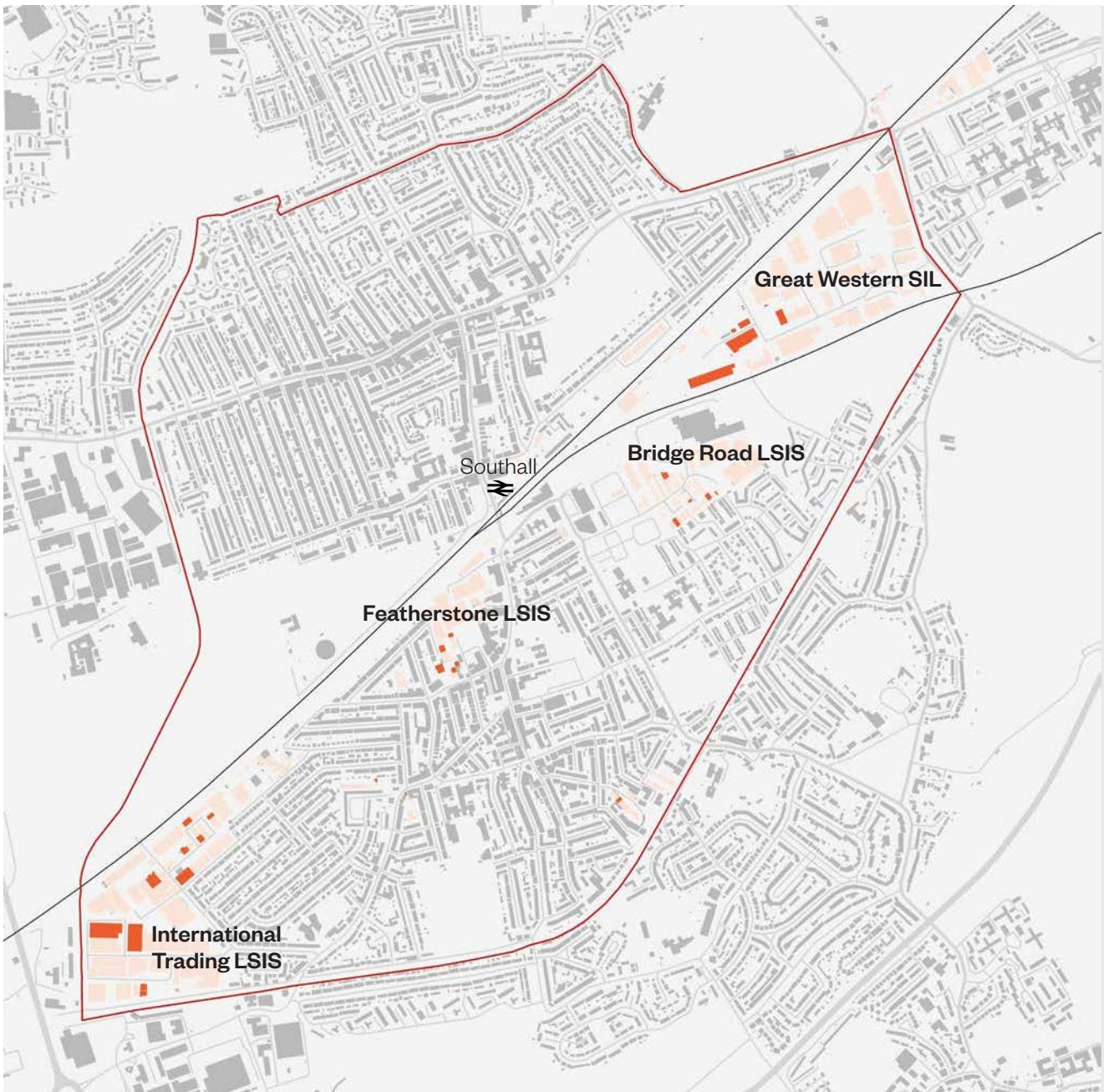
Rainbow Logistics, Endsleigh Industrial Estate

Transport and logistics businesses are a key element of the Southall local economy and different supply chains.

Key

- Transport and logistics
- Other

Southall Opportunity Area



05

Case Studies

**Nasco
Classic Prop Hire
Ajay Autos**

Nasco

Nasco Ltd is a wholesaler and exporter of food, drinks, and household goods based in Great Western Industrial Estate. Created in 2003, the company has been based in their current location since 2018. While they are overall satisfied with their working space, growing business has led to potential issues with the need of a bigger space.

They specialise in the export of British and European products to over 60 countries, and in particular to South Asian markets. These include canned goods, soft drinks, condiments, toiletries or pet food. Nasco ships over 100,000 cubic meters of goods annually.

Around 80 people are currently employed in their Southall site. Half of those jobs approximately are warehouse-based. A further 20 people work as drivers, while the remainder are based in the office. Approximately half of all employees are based in the borough of Ealing. Employees mainly get to work by public transport or cycling (40% each), the remaining 20% by car.



Nasco Ltd (loading area)



Nasco Ltd (yard)



Location of Nasco (1) in Southall

Opportunities

- Growing activity with limited impact from Covid-19 disruptions
- Business relationship with local businesses such as the TRS cash and carry

Challenges

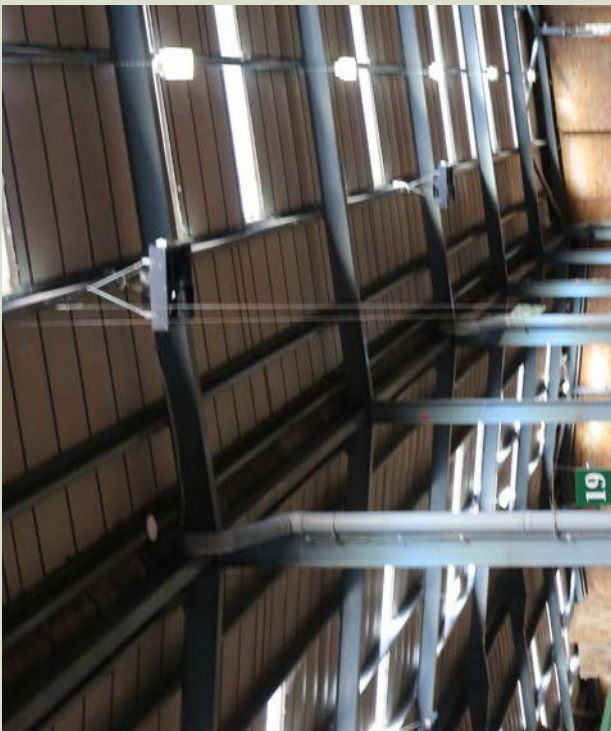
- Difficulties recruiting qualified staff for office-based jobs
- Lack of drivers causing disruptions across services

The Classic Prop Hire

The Classic Prop Hire Ltd specialises in prop, set dressing and textile hire for films, TV and events. Created in 2018, it is based on two different sites within the International Trading Estate. Their main location, on Trident Way, has 30 employees. A further 15 people are based in the Seasons Textile building on Boeing Way, which specialises in textiles specifically.

Half of the company's employees live within the borough of Ealing, the rest are based in the wider Greater London area. Two thirds of employees travel to work by car, the rest commuting either by public transport or cycling. Overall, the connectivity to the site was perceived as good.

The Classic Prop Hire has encountered substantial disruption at the early stage of the Covid-19 pandemic, but has since reported a positive increase in activity as the film industry is now back in action. However, they still face some barriers as Brexit has caused difficulties in import and export services, and recruiting staff with the necessary industry expertise has been challenging.



The Classic Prop Hire showroom



Location of The Classic Prop Hire (1) and Seasons Textile branch (2) in Southall

Opportunities

- Access to West London's film studios from Southall
- Easy access to the motorway
- Proximity to Central London

Challenges

- Disruptions in supply chain since Brexit
- Shortage of labour and contractors
- Traffic in and around the estate

Ajay Autos

Ajay Autos is an MOT and car repair business established in 1984. It is located on Merrick Road, near Bridge Road, across a residential development which replaced a car dealership and service station in 2018. There are currently five employees at Ajay Autos, all based in the boroughs of Ealing and Hounslow. They commute to work by car.

The majority of Ajay Autos' customers are based locally (within 3 miles), with others coming from Greater London or the South East more generally. Ajay Autos define themselves as a 'community garage', providing a service to many long-term residents of Southall and emphasising the relationship of trust established over the years with many customers.

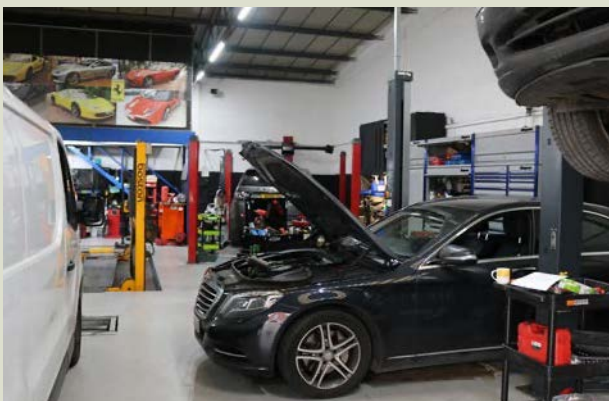
Faced with the rapid spatial and social changes in Southall in recent years, the business expressed concern over the future of car repair services in the area, sometimes displaced by new developments.



Location of Ajay Autos (1) in Southall



Ajay Autos frontage



Ajay Autos garage

Opportunities

- A strong sense of community in Southall
- Access to a large number of customers locally

Challenges

- New developments displacing other uses
- Lack of parking space for employees and customers

06

Key take-aways and recommendations

Key take-aways

'Glocalised' geographies of influence

Almost all businesses profiled are independent businesses with origins in Southall. Many revealed strong local networks, formal and informal, but this was particularly prevalent across the food sectors.

TRS Cash & Carry and Noon are examples of major employers with large footprints that have based their operations in Southall for over 20 years. Several long-time businesses surveyed cite Southall's strong South Asian community as a key reason for their original location in Southall.

This dynamic has created a distinct economy linking the hyper-local and international. Hosting both local networks and business relationships and international supply chains and spheres of influence, Southall's 'glocalised' economy enables goods and money to cross constantly between the UK and the rest of the world.

Overall, Southall has established itself as something of an operational 'sweet spot' for food companies as well as wholesalers who seem to continue to move into the area and drive ongoing investment.

A key location for independent and small businesses

Access routes and proximity to central London and key West London centres means that the area also provides workspace for independent, smaller businesses for which links with the local communities and London are vital. These workspaces are increasingly coveted as the city continues to shrink its supply of industrial land or rationalise smaller sites into sites for larger-scale logistics.

With low vacancy rates and a desire for more spaces for small scale operations reported across site interviews, there is a sense that small scale workspace provision remains under-served.

In the future and as Southall's industrial provision evolves, it is important that premises for small- to medium-sized industrial type activities, and their related diverse employment base, is retained in order to ensure that smaller and expanding businesses have a chance to gain a foothold.

Some key sector specialisms and evidence of supply chain

Mapping sector concentrations has helped to identify defining characteristics and specialisms across Southall.

Although exact inter-relationships between these clusters are difficult to quantify, case study visits and longer conversations with businesses provide informal indications of working relationships between clusters.

For example, food businesses getting their vans serviced by a local vehicle maintenance business, food manufacturers providing supplies to large online retail stocks, and businesses using local wholesalers for ad-hoc staff and stock provisions.

A changing labour market and some challenges around skills and recruitment

Conversations with industrial occupiers revealed that both long-term and recent labour market trends have had implications for Southall firms. Business including launderers and food manufacturers cite Southall's immigrant labour pool as a key motivation for their location in this area in past decades.

As many immigrant employees working in Southall have found success in the area, their children have become upwardly mobile. This has contributed to an inability of local firms to rely wholly on the skills of local residents to fill local vacancies, particularly in manufacturing and laundering.

This has coupled with more recent and large-scale trends to make recruitment one of the biggest challenges for businesses surveyed. For example, a national shortage of lorry drivers has put pressure on many in Southall who rely on road distribution for access to supply and customer chains.

Some emerging concerns around changes and aspirations for the area to be a productive place

The signs, pace and scale of change are omnipresent in Southall. Reflecting this, many businesses expressed anxiety over the future of their premises and concerns that their businesses would not be viable should they be required to move outside the area.

Particular concerns came from MOT and auto repair traders, who have recently seen other traders lose their premises to forthcoming development. Many referred to strong formal and informal networks within Southall and recognised that the cost of higher quality premises would be prohibitive to their continued operation.

However, very few businesses surveyed report intention to move off-site within the next year, and narratives around doing business in the area are generally positive and recognise the value of their location.

Southall and its cluster of industrial estates continue to attract and retain a wide mix of industrial activities and employment opportunities and businesses operating across the sites included in this study continue to see the area as a productive place to do business.

Potential presence of unlawful activity

The on-the-ground audit exposed some signs of potentially unlawful activity occurring on Southall's industrial land. While the vast majority of businesses observed appear to be operating wholly legitimately, there is some evidence of unlawful activity in small pockets of both designated and undesignated land. This evidently runs the gamut from under-reporting employment to unlicensed retail or commercial activities occurring on site.

The data gathered through this audit should be read with the understanding that it is likely some businesses are under-reporting employment numbers and that this may reflect a reticence to engage formally with the Council or other businesses.

The case for intervention

The London Plan sets out an ambitious target to accommodate new homes but also new jobs in Southall, in addition to the substantial existing employment.

Southall's existing industrial sites are diverse in nature and the study has worked to characterise them and to identify the key challenges and opportunities in each location. The findings from this study suggest that there is a potential for Southall to grow as an employment and industrial location, both in terms of scale and in terms of diversity of activities. Given the finite land resources available and the ambitious housing targets, future development will need to deliver fit for purpose working environments that are innovative both in delivering standalone employment schemes as in collocating different uses.

Considering the proposals coming forward, the current policy context and the broader development landscape, pro-active public sector approach is required in Southall to successfully retain existing businesses and accommodate new jobs and activities. Relying solely on the planning policy currently in place and the developer and investor community activities is unlikely to result in the kind of development compatible with the existing ambitions for the area. There is a need for a strong vision and a new policy for the area focused on the delivery of the right kind of employment floorspace with realistic additional employment and housing targets which would steer development in a more desirable direction and aid development management

Overall, Southall will require a mix of employment spaces, blending lower density distribution activity with workshop, office, studio and other types of space to allow existing businesses to grow and new businesses to locate here. Increasing the number of jobs in the area will also require some refocussing of the employment floorspace offer to secure a more significant proportion of higher density employment opportunities than exists today. This will require more proactive intervention to create the conditions and spaces that these businesses will want to populate — the delivery of Crossrail will undoubtedly help to change the market position of parts of Southall and support this shift.

However to achieve this the fundamental strengths of Southall industrial areas (in terms of accessibility, affordability and property proposition) will need to be protected and enhanced in order to provide the conditions that allow a range of businesses to succeed here. There is also a need to support key sector specialisms, including food related and wholesale activities. By doing so, the Council has the opportunity to hardwire a unique identity and economic role into the physical hardware of Southall's employment areas.

Overarching recommendations

The SWOT analysis presented in the report highlight the key challenges and opportunities that each designated industrial land faces. Below are resumed the broad recommendations directed to the Council and its partners coming out of the research.

Ensure that Southall's industrial sites are managed first and foremost for their capacity to provide industrial uses.

Across all designated industrial areas, non-conforming uses should be prevented:

- Great Western SIL should be safeguarded and improved as strategic employment land for heavier industrial activities and larger units. Non conforming uses should be prevented
- The LSIS across Southall should be protected and consolidated. Mixed intensification could be sought in and around Bridge Road, but any development proposal should take an industrial-led approach.

Place Southall's industrial land, activities and jobs at the heart of the Southall RESET Action Plan.

This should include finding opportunities to make the hidden but productive industrial economy of Southall more visible and educating people at all levels on the value of local spaces of production.

Re-designate Charles House, Balfour Business Centre and Southall Business Park as LSIS

Consider opportunities in the local plan-making process to re-designate industrial land which continues to host active market but is threatened by development pressure. This includes Charles House, Balfour Business Centre and Southall Business Park.

Create a positive business environment by improving public realm, connectivity and amenities.

Seek to create the right business environment within key employment location. Engage with key industrial landowners to find opportunities to improve public realm, infrastructure and amenities and address issues around connectivity, safety and wayfinding.

Businesses will need more than functioning space to be successful in Southall.

Site-specific development studies

Consider the development of site-specific development studies (potentially developed into masterplans or site-specific development briefs) for key locations likely subject to redevelopment to ensure the environments created are fit for purpose (eg Charles House, non-designated industrial estates). This can provide a basis for planning negotiations and can help to provide or increase certainty to landowners, from what is expected from development and positively support the delivery of functional employment space.

Actively broker relationships between developers and workspace operators

The council should seek to actively broker relationships between developers and potential employment space operators. A bespoke inward investment function in collaboration with the local agents, landowners could be set up targeting industrial and employment uses and promote opportunities in Southall. Furthermore, the council could play a more direct role beyond its statutory duties of setting policy and planning during pre-application process and help to curate the local business community.

Develop and implement a relocation strategy

Successful growth in Southall will balance the retention of existing businesses with the creation of new spaces for people to work in. Inevitably, as development happens, some business displacement will occur however it is vital that this is kept to a minimum if the character and economic value of the Southall is not to be lost. In this way, a relocation strategy should be sought where redevelopments happen.

Appendix

Definitions

This study has adopted a set of activity and workspace definitions in its working and reporting, as well as commonly adopted definitions within economic and workspace research.

Workspace building typologies

The following workspace categories have been used to define and map workspaces in the Purley Way area. These categories refer to spatial characteristics (access, scale, servicing), rather than activity. It is possible, for example, for food & drink related businesses to be recorded in re-purposed industrial spaces.

Building type	Definition
Pre-1945 industrial building	Older building stock of various forms for industrial uses
Post-1945 industrial building	Post-war building stock of various forms for industrial uses
Post-1990 industrial building	Typically single storey buildings, loading bay, with medium ceiling height (4-6m) potential internal mezzanine
Post 2005 industrial building	Typically double ceiling height (6-8m), loading bay, provision on ground floor
Retail development with car parking	Supermarkets, wholesalers and 'big-box' stores
Bespoke industrial or utilities premises	Building typically built for a specific activities/utilities
Office building	Typical lower ceiling (2.9 - 4.4m), provision possible on any floor
Small retail unit	Typically accommodating A1 uses, on ground with street- frontage
Yard space	Yard space used for the primary operations of a business, typically with a small or no ancillary building required

Appendix

Business activities

The following activity categories and associated SIC code grouping have been used to define and map economic sectors.

Activity group	Example SIC codes
Services	85600 - Educational support services
Manufacturing	25110 - Manufacture of metal structures and parts of structures
Wholesale	46520 - Wholesale of electronic and telecommunications equipment and parts
Warehousing	52103 - Operation of warehousing and storage facilities for land transport activities
Transport and logistics	49410 - Freight transport by road
Construction	43390 - Other building completion and finishing
Construction-related retail, hire and wholesale	31020 - Manufacture of kitchen furniture
Utilities	38110 - Collection of non-hazardous waste
Vehicle sales and repairs	45200 - Maintenance and repair of motor vehicles
Retail	47530 - Retail sale of carpets, rugs, wall and floor coverings in specialised stores
Hairdressing and beauty treatment	96020 - Hairdressing and other beauty treatment
Restaurants, cafés and takeaways	56103 - Take away food shops and mobile food stands
Creative industries	59200 - Sound recording and music publishing activities
Vacant	N/A

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