

Enfield Employment Land Study

Final Report

December 2006

*Prepared for:
London Borough of Enfield*





London Borough of Enfield

Enfield Employment Land Study *Final Report*

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Halcrow Group Limited

in association with Accent Market Research Limited and Glenny LLP

Halcrow Group Limited

Vineyard House, 44 Brook Green, London W6 7BY, UK Tel +44 (0)20 7602 7282 Fax +44 (0)20 7603 0095 www.halcrow.com

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Enfield Employment Land Study *Final Report*

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Abbreviations

AAP	Area Action Plan	SEL	Strategic Employment Location
ABI	Annual Business Inquiry	SIC	Standard Industrial Classification
EELS	Enfield Employment Land Study	SOA	Super Output Area
GDP	Gross Domestic Product	SPG	Supplementary Planning Guidance
GLA	Greater London Authority	SRDF	Sub-Regional Development Framework
GVA	Gross Value Added	SREDIP	Sub-Regional Economic Development and Implementation Plan
IBP	Industrial Business Park	TfL	Transport for London
LBE	London Borough of Enfield	UDP	Unitary Development Plan
LDA	London Development Agency	ULV	Upper Lee Valley
LEPS	[PACEC] Local Economic Profiling System		
LSCP	London-Stansted-Cambridge-Peterborough [Growth Corridor]		
MCA	Multi-Criteria Analysis		
MPC	[Bank of England] Monetary Policy Committee		
NLELS	North London Employment Land Study		
NLSA	North London Strategic Alliance		
NLSRDF	North London Sub-Regional Development Framework		
PEL	Primary Employment Location		
PIL	Preferred Industry Location		
PPS	Planning Policy Statement		
PPG	Planning Policy Guidance		
PTAL	Public Transport Accessibility Level		
ODPM	Office of the Deputy Prime Minister		
RTP	Roger Tym and Partners		

Executive Summary

The information presented within the report (including all assessments, findings and recommendations) are solely based on the views of the Consultant Team, and has been prepared using site information collected during March and April 2005. As a result this report, and the information presented within it, does not constitute the views of the London Borough of Enfield (LBE).

Introduction

This study has been undertaken to assess the current usage and future need for employment land within the London Borough of Enfield in order to inform the ongoing economic, planning and development activities within the borough. The LBE commissioned this work and it has been undertaken by a multi-disciplinary team from Halcrow, Accent and Glenny¹.

The key drivers for the commission of this study include:

- The need to develop a stand alone and borough wide employment land report (with associated maps and data)² that provides the employment land related evidence base for the forthcoming Enfield Local Development Framework (LDF)

¹ Accent provided the business survey data collection activities, Glenny provided borough and cluster market commentaries, and Halcrow provided the overall assessment along with all other appraisal and specialist inputs.

² To the standard set out within the *Employment Land Reviews: Guidance Note* (ODPM, 2004)

- A requirement for the Enfield employment land supply and demand data to be analysed and presented on a Area Action Plan (AAP) basis in order to facilitate the production of the Enfield LDF

The following objectives were agreed for the study:

- To undertake a borough wide employment land study that builds upon and takes forward the Enfield information contained within the *North London Employment Land Study (NLELS)*
- To achieve this the following activities were undertaken:
 - Production of a more detailed socio-economic assessment that considers the key issues at both borough wide and sub-district levels
 - Extension of the property market analysis, including the production of individual cluster market assessments
 - A business survey of existing businesses to provide detailed information on business characteristics, intentions and behaviour, along with location and site requirements
 - Use of more detailed local employment density information to improve the employment land demand analysis
 - More detailed employment cluster appraisals
 - Presentation of employment land policy recommendations
- Revising and extending the *NLELS* analysis to produce the study deliverables

The study covers the 25 employment land clusters identified by LBE and presents analysis at the borough level, and also (where possible) for the Area Action Plan areas of North East Enfield, North Circular and Central Leaside³.

Study context

Policy context

The analysis of employment land in Enfield is set within the context of the range of current / emerging planning and economic policies that are relevant to the retention of, and potential land-use changes to, existing employment land.

At the national policy level, planning policies including PPS1, PPG3, PPG4, PPS6 and PPG13 provide a framework that:

- Recognises the wider benefits of economic development
- Ensures suitable locations for employment uses are available so the economy can prosper
- Supports the release of employment land where re-use does not undermine local economic development or regeneration
- Acknowledges the interaction between employment and other land uses
- Encourages employment and mixed use development to the most appropriate locations
- Promotes a safe, efficient and integrated transport system to support a strong and prosperous economy.

³ While the socio-economic review includes analysis of all AAP areas, the North Circular AAP area is excluded from the land supply analysis because there is very limited employment land in the area.

The regional policy context promotes a range of policy designations that seek to promote sustainable development and direct development locations. For employment purposes this includes Opportunity Areas, Areas for Intensification, Areas for Regeneration, Strategic Employment Locations (including Industrial Business Parks and Preferred Industrial Locations). While the continued contraction of London's manufacturing sector is acknowledged, regional policy recognises that other types of industrial activities (including logistics, waste management and recycling, and transport activities) will increasingly require land within the Capital.

At the sub-regional level, a range of existing and emerging policies provide the vision, development and economic framework for North London and Enfield's role within the sub-region. The heavy concentration of industrial / warehousing land within Enfield is reflected and the economic role of the borough is strongly supported. Of particular relevance is the importance of the North East Enfield and Central Leaside Area Action Plan areas in the economic restructuring of the area.

Socio-economic context

The prevailing socio-economic context of Enfield is defined by the following characteristics:

- In terms of GVA and average wages, the Enfield economy is a relatively low value economy that is growing at a slower rate than the Greater London economy. For example, average workplace-based average wages in Enfield (2005) were 82% of the London average.
- Employment in the borough has fallen by 6% in the period 2000 to 2004, reflecting the economic restructuring that has taken place in the borough. Of the 91,608 workplace jobs in

the borough, 17% are located in the North East Enfield AAP area.

- While the borough economy is dominated by the service sector (54% of employment), the characteristics of the Central Leaside and North East Enfield AAP areas have an over reliance on manufacturing and warehousing sectors.
- Education attainment and skill levels are both significantly below regional and national averages, resulting in a lower occupational structure.
- In terms of deprivation there are significant pockets of deprivation, mainly focused in the east of the borough around the Central Leaside and North East Enfield Area Action Plan locations.

Market context

Enfield contains the largest concentration of industrial/ warehousing activity in the sub-region and experiences the strongest demand, which comes from both local and national companies. The early 1990s property crash effectively halted all speculative commercial development in this region and the first new industrial buildings developed (without pre-lets or pre-sales) was circa 1997. Subsequent to that there have only been a handful of further “schemes” although a number of opportunities are now beginning to arise following developers purchase of sites or buildings.

The major industrial / commercial zones are concentrated along the A1055 (north-south route) which is effectively a corridor running against the borough’s north eastern boundary, and the smaller cluster around Southbury Road / A10. The benefit of such clearly defined industrial / commercial areas is that pressure to transfer uses of this valuable commodity into other uses are not easy to achieve, thus concentrating development

interest on those opportunities which are generally smaller and within the core residential zones.

Enfield, in line with the vast majority of South East England, has seen a huge decline in the true manufacturing industries over the last decade or so. This is a national trend and one which is probably irreversible given the comparatively low labour and transport costs associated with production available in the developing world. In the borough however the gap in employment terms has been largely filled by the trend for business diversification into distribution, re-packaging and service sector.

It is estimated there is potentially 450,000 sq ft of new small and medium sized warehouse/industrial building in the planning pipeline or under construction. This will almost entirely be based upon sites which were formerly occupied by single or larger users.

Business survey

The Enfield Business Survey highlights some important characteristics of Enfield companies that influence the demand for land and premises.

- The overall picture presented by the business survey is of a localised/sub-regional demand for land and premises from businesses. Most businesses were founded in Enfield or North London.
- In terms of characteristics, Enfield businesses were predominantly single site businesses (62%) or a branch/subsidiary of a UK business (34%); serving customers within North London or the wider Greater London area; and with a strong supply base in the area.

- Businesses on the whole are very satisfied with Enfield as a business location, with two-thirds rating their premises as good or very good and the same amount rating the surrounding area as good or very good.
- As a source for future demand for employment land the survey presents an optimistic scenario for the short-term. Almost two-thirds anticipate business growth in the next three years and 32% plan to change premises in the same period.
- The motivation for changing premises is varied but key factors include the need for larger premises, better quality premises, and lease arrangements coming to an end. Of those wishing to move, 33% want to stay in Enfield and a further 21% in North London.

- 115ha accounts of almost a third of Enfield employment land area.
- A good spectrum of employment land sites are found within Enfield from very small (less than 250m²) through to the very large (172,000m² plus). However the top 18% of sites cover just over 2.7million m² (272ha). This equates to around 76% of the net area covered by all Enfield employment sites.
- Just over 2.7 million m² of employment floorspace was identified within Enfield
- While the building stock within Enfield is generally identified as either 'Good' or 'Reasonable' a higher proportion of buildings have been identified as 'Poor' or 'Very Poor' than was the case at the North London level

Employment land supply

Within the London Borough of Enfield, 807 individual employment sites were identified within 25 employment land clusters. These clusters covered around 404ha of land, which equates to approximately 4.9% of the Borough. A summary of this employment land supply is provided in **Table ES1**.

The key findings of the Enfield employment land supply assessment were:

- The top three land use categories by site area are food and tobacco, wholesale, and warehousing which combined account for 41% of employment site land area (136ha) and 39% of employment sites (276 sites)
- Just over two thirds of the Enfield employment land is located within 7 very large employment clusters (28% of the identified clusters) each of which is 15ha or larger. The Brimsdown Industrial Area is the largest of these and at

Table ES1: Enfield land supply summary

Number of clusters and sites	
Number of clusters	25
Number of sites	807
Employment land areas (ha)	
Gross employment land	404.2
Net employment land (excl roads/ public space)	359.1
Net employment land in industrial / warehousing use (including unclassified uses)	333.2
Vacant or derelict land	65.0
'Unknown'	14.2
Gross borough area	8,192
Employment land areas (%)	
Gross employment land as percentage of borough	4.9

Source: Halcrow (April 2005)

With regards to land supply in the North East Enfield and Central Leaside Area Action Plan areas:

- Between them the North East Enfield and Central Leaside AAP areas account for 74% of borough employment sites and 83% of gross employment land. As the larger area, North East Enfield AAP accounts for 56% of Enfield's gross employment land alone.
- They also account for almost all of the borough's vacant employment land. North East Enfield incorporates 30.2ha of vacant land and Central Leaside 31.8ha. The vacancy level in Central Leaside is much higher than in North East Enfield (33.6% and 17% respectively).
- Within the North East Enfield AAP area, employment land is dominated by the Brimsdown Industrial Area. This cluster accounts for 68% of sites in North East Enfield, and 60% of net employment land. Outside of this area only three other clusters are larger than 10ha (net).
- In Central Leaside the employment land offer is more diverse and spread across a number of similar sized clusters. The largest area is Eley's Estate with 25ha (net), but five of the six clusters have gross land areas of 14ha or more.
- There is a distinctly different land use character in each area. In North East Enfield the dominant land uses are warehousing (25.2%) and wholesale (17.7%), with a strong representation of food and tobacco manufacturers (9.5). In Central Leaside, while warehousing is the largest sector, at 10.2% it is not as dominant.
- This land use character has translated through in to a different offer in terms of the cluster size and range of net site sizes. For example, North East Enfield has a greater percentage of land accommodated on large clusters (88% of net employment land is accounted for by the three biggest clusters), and has a significantly higher proportion of land associated with sites over 20,000 m².
- The premises stock in North East Enfield is a better quality than the stock in Central Leaside and also considered to be more recently developed stock. Around 50% of the former's stock was classed as 'good' quality and identified as built since 1985.

Employment land demand

With regards to demand, the forecast for employment land is subject to a high level of sensitivity, reliant as they are on employment forecasting data, employment density and plot ratios. Under the Core Enfield employment demand scenario the forecast employment

land demand in 2016 ranges between 327ha and 388ha. This represents an increase in demand between 2001-2016 of 11ha and 15ha. **Taking the mid-point, we estimate that employment land demand in 2016 will be 357ha, an increase of 13ha in the period 2001-2016.**

Table ES2: Net Employment Land Demand (2001-2016)

	Core Enfield Scenario (ha)						
	2001	2005	2006	2011	2016	Land Demand Forecast 2001 to 2016	Land Demand Forecast 2005 to 2016
Core Plot Ratio – High Employment Densities	315	301	304	318	327	11	26
Core Plot Ratio – Low Employment Densities	373	357	361	377	388	15	31
Mid-range	344	329	332	348	357	13	28

Source: Halcrow Note: Figures may not add due to rounding

‘Land requirement’ for Enfield

The context for the EELS study is the NLELS study which assumed that *‘at any point in time, the planned supply and market demand for industrial/warehousing land will be in balance if supply equals the demand for occupied land, plus margins of vacant land and vacant floorspace to allow for smooth operation of the market’*.

Therefore, the important consideration for policy purposes is to focus on *change* in supply and demand over the relevant planning period with this change referred to as the **‘land requirement’** (or land release if negative). In this respect the desired change in planned supply equals structural change in demand, plus

required change in vacant land / floorspace, plus intensification.

As noted above, the **change in demand for employment land is forecast to be between 11ha and 15ha for the period 2001-2016**. However, it also shows that in the period 2005-2016 the demand increase is higher (26ha to 31ha) and implies that a greater adjustment to the supply of employment land is required for this period.

With regards to **vacant land and floorspace**, there needs to be a natural level of vacant land to facilitate the effective operation of the market. Within Enfield the

site survey identified that 65ha (19.5%) of net industrial/warehousing land is vacant⁴, which is higher than the generally considered natural percentage rate of around 10%. Reducing vacant land to 10% of existing net industrial/warehousing stock (approximately 33ha) indicates a potential vacant land release of 32ha by 2016.

Intensification has been considered through the sensitivity of employment density and plot ratios. While the employment density underpins the range in demand requirements, demand is not sensitive to plot ratios and therefore this has not been incorporated in the land requirement calculation.

The conclusion is that Enfield Borough's land requirement for the period 2001-2016 is -17ha to -21ha. It is considered possible to accommodate this requirement without constraining the economy of the borough. However, the analysis estimates that in the period 2005-2016 the potential land requirement is significantly lower at between -1ha to -6ha on the basis that the most significant structural change in the industrial and warehousing sectors has already taken place.

⁴ 'Vacant land' as defined by the survey includes vacant/derelict sites and sites containing vacant/derelict floorspace.

TableES3: North London Land Requirements, 2001-2016

	2001-2016 (ha)	2005-2016 (ha)
Change in Structural Demand	+11 to +15	+26 to +31
Change in Vacant Land required	-32	-32
Total Land Requirement	-17 to -21	-1 to -6

Source: Halcrow

Therefore we consider there to be very limited scope for employment land release within Enfield. The analysis suggests that the existing stock of vacant land and premises can be used to meet future demand and still leave sufficient 'vacancy' levels to allow smooth market operation. Limited and small scale land release may be appropriate where sites are clearly not marketable or where intensification / redevelopment for employment use creates opportunities for other adjacent uses.

Appraisal and recommendations

To conclude, the Enfield Employment Land Study presents an appraisal of each of the employment clusters and provides broad policy advice on the potential or otherwise for land release (within the context of the key findings above). The aim is to provide analysis and comment to help inform Enfield Council on potential Employment Land Policy and issues associated with individual sites.

The appraisal brings together the supply and demand analysis to provide analysis of the constraints and opportunities for the borough and individual site clusters. Two specific appraisal techniques have been used to derive the policy response:

- Market Appraisals that consider the current market context and potential future opportunities of each employment land cluster in Enfield
- A Multi-Criteria Appraisal (MCA) of each cluster in order to be able to create a ranking system for the borough's clusters.

Three tiers of policy response recommendations (red, yellow and green) have been prepared for the Enfield employment land clusters based on the combination of the market appraisals and the MCA results.

- **Red clusters** – These typically contain vibrant and robust businesses, have predominately good quality modern buildings and are reasonably well connected to the existing transport systems. It is recommended that they are retained for employment use.
- **Yellow clusters** – These clusters have a mix of building and access quality and in some cases are located close to sensitive receptors. It is recommended that while the majority of the cluster should be retained for employment uses it may be appropriate for a portion of the cluster to be released for other uses.
- **Green clusters** – These clusters were found to typically be run down, poorly connected to transport infrastructure and largely surrounded by

sensitive receptors (such as housing). As a result it is recommended that an appropriate change of use is allowed for these clusters.

The analysis concludes that:

- **Thirteen** of the Enfield clusters are identified as **Red Clusters** (i.e. any change of use should be strongly contested).
- **Eight** of the Enfield clusters are classified as **Yellow Clusters** where a partial change of use could be considered, provided that it is used to assist with the retention of employment uses on the remaining areas
- Only **two** of the Enfield clusters have been categorised as **Green Clusters** where a change of use is considered appropriate

These are summarised overleaf.

Table ES4: Cluster policy responses

Cluster Number and Name	Response Tier
EN001 – Chase Side Works	Green
EN003 – Regents Avenue	Green
EN004 – Oakthorpe Dairy	Yellow
EN005 – New Southgate Industrial Estate	Yellow
EN006 – Redburn Trading Estate	Yellow
EN007 – Queensway	Yellow
EN008 – Harbert Road Estate	Red
EN009 / EN014 / EN026 – Meridian Way Land / Glover Drive / Kimberly Road	Red
EN010 – Montagu Industrial Estate / Kenninghall Estate / Railtrack Lands	Red
EN011 – Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	Yellow
EN012 – Langhedge Lane Industrial Estate	Yellow
EN013 – Commercial Road and North Middlesex Estate	Yellow
EN015 – Eley's Estate	Red
EN016 – Innova Park	Yellow
EN017 – Hertford Road / Mollison Ave	Red
EN018 – Meridian Business Park	Red
EN019 – Aztec 406 Development Site	Red
EN020 – Brimsdown	Red
EN021 – Great Cambridge Inds Estate	Red
EN022 – Great Cambridge Road (Martinbridge Trading Estate)	Red
EN023 – Great Cambridge Road	Red
EN024 – Great Cambridge Road	Red
EN025 – Alma Industrial Estate	Red

Source: Halcrow

1 Introduction

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1.1 Background

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The key drivers for the commission of this study include:

- The need to develop a stand alone and borough wide employment land report (with associated

⁵ Accent provided the business survey data collection activities, Glenny provided borough and cluster market commentaries, and Halcrow provided the overall assessment along with all other appraisal and specialist inputs.

maps and data)⁶ that provides the employment land related evidence base for the forthcoming Enfield Local Development Framework (LDF)

- A requirement for the Enfield employment land supply and demand data to be analysed and presented on a Area Action Plan (AAP) basis in order to facilitate the production of the Enfield LDF

This report is one of a number of deliverables that have been produced for this study with the others including:

- An **Employment Land Map** that provides an overview of the existing Enfield employment land
- An **Employment Land GIS / Database** that provides a range of detailed information on each site surveyed during the study
- A **Business Survey Database** (without business names) that provides the information collected during the business telephone surveys

1.2 Study objectives

The following objectives have been identified and agreed for this work:

- Undertake a borough wide employment land study that builds upon and takes forward the Enfield

⁶ To the standard set out within the *Employment Land Reviews: Guidance Note* (ODPM, 2004)

information contained within the *North London Employment Land Study (NLELS)* (Halcrow, 2006)

- To achieve this the following activities were undertaken:
 - Production of a more detailed socio-economic assessment that considers the key issues at both borough wide and sub-district levels
 - Updating and extending of the property market analysis, including the production of individual cluster market assessments
 - Undertaking a telephone survey of existing businesses to provide detailed information on business characteristics, intentions and behaviour, along with location and site requirements
 - Use of more detailed local employment density information to improve the employment land demand analysis localisation
 - Undertaking more detailed employment cluster appraisals
 - Presentation of employment land policy recommendations
- Revising and extending the *NLELS* analysis to produce the study deliverables

1.3 Study and analysis area

The study area covers the 25 employment land clusters that were identified within Enfield and outlined on the following page (**Figure 1-1**). Analysis is presented primarily at the borough level to provide a

comprehensive assessment of all employment land in Enfield. Additional analysis and information is presented for the North East Enfield, North Circular and Central Leaside Area Action Plan (AAP) areas to support the development of the LDF⁷. For statistical purposes each AAP is defined at the Super Output Area (SOA) level, as shown in **Figure 1-2**.

1.4 Report structure

To address these objectives this report has been structured as follows:

- **Section 2** outlines the study context in terms of the policy, socio-economic, and property market conditions
- **Section 3** presents the analysis and results of the business telephone surveys
- **Section 4** considers the existing quantity and quality of employment land within Enfield
- **Section 5** considers current and forecast demand for employment land in Enfield
- **Section 6** presents the key findings and conclusions on the supply and demand balance in Enfield; and finally
- **Section 7** presents the policy response to these findings by considering the cluster appraisals and land release issues.

⁷ While the socio-economic review includes analysis of all AAP areas, the North Circular AAP area is excluded from the land supply analysis because there is very limited employment land in the area.

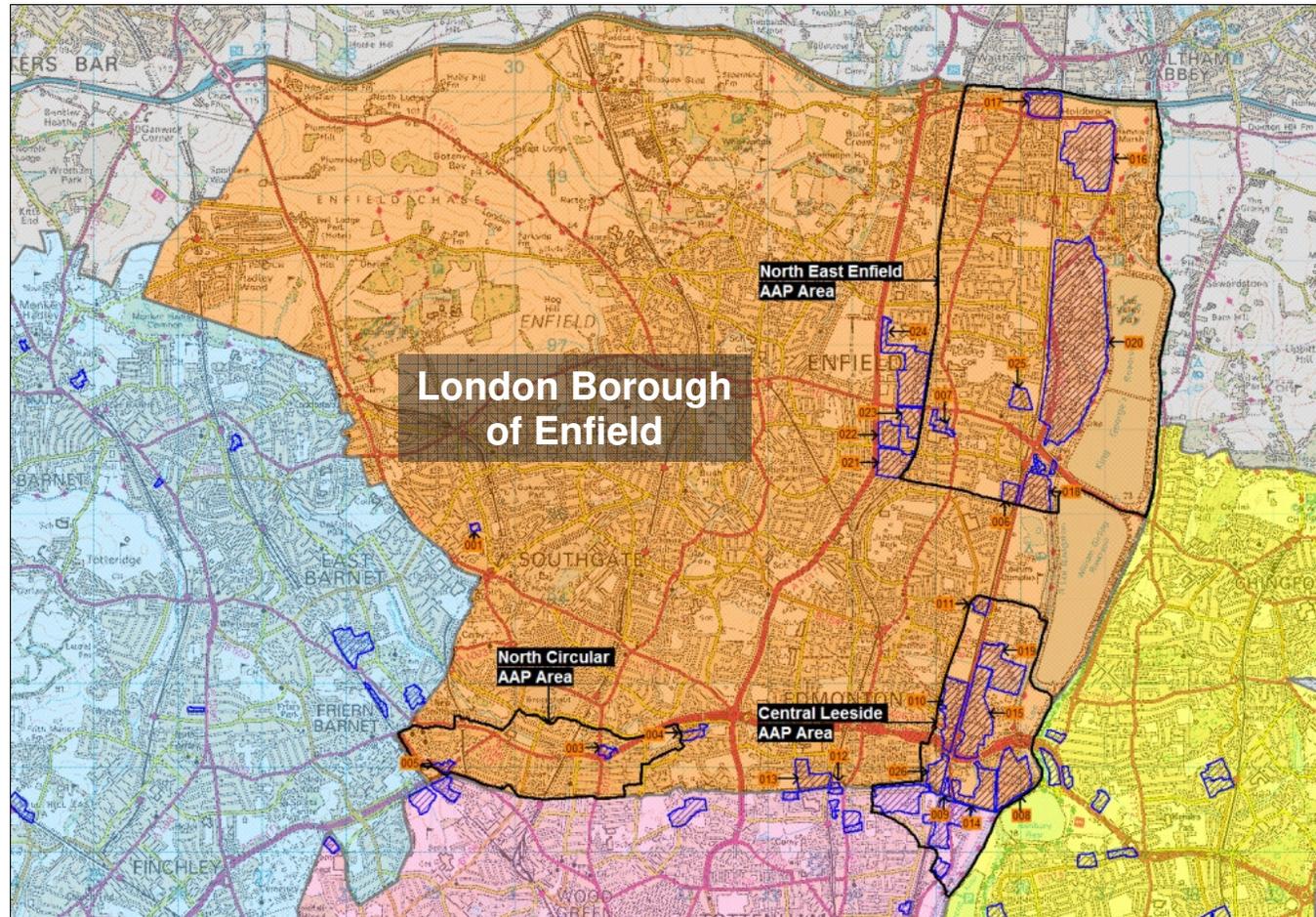


Figure 1-1 Enfield employment land study areas (Source: Halcrow)

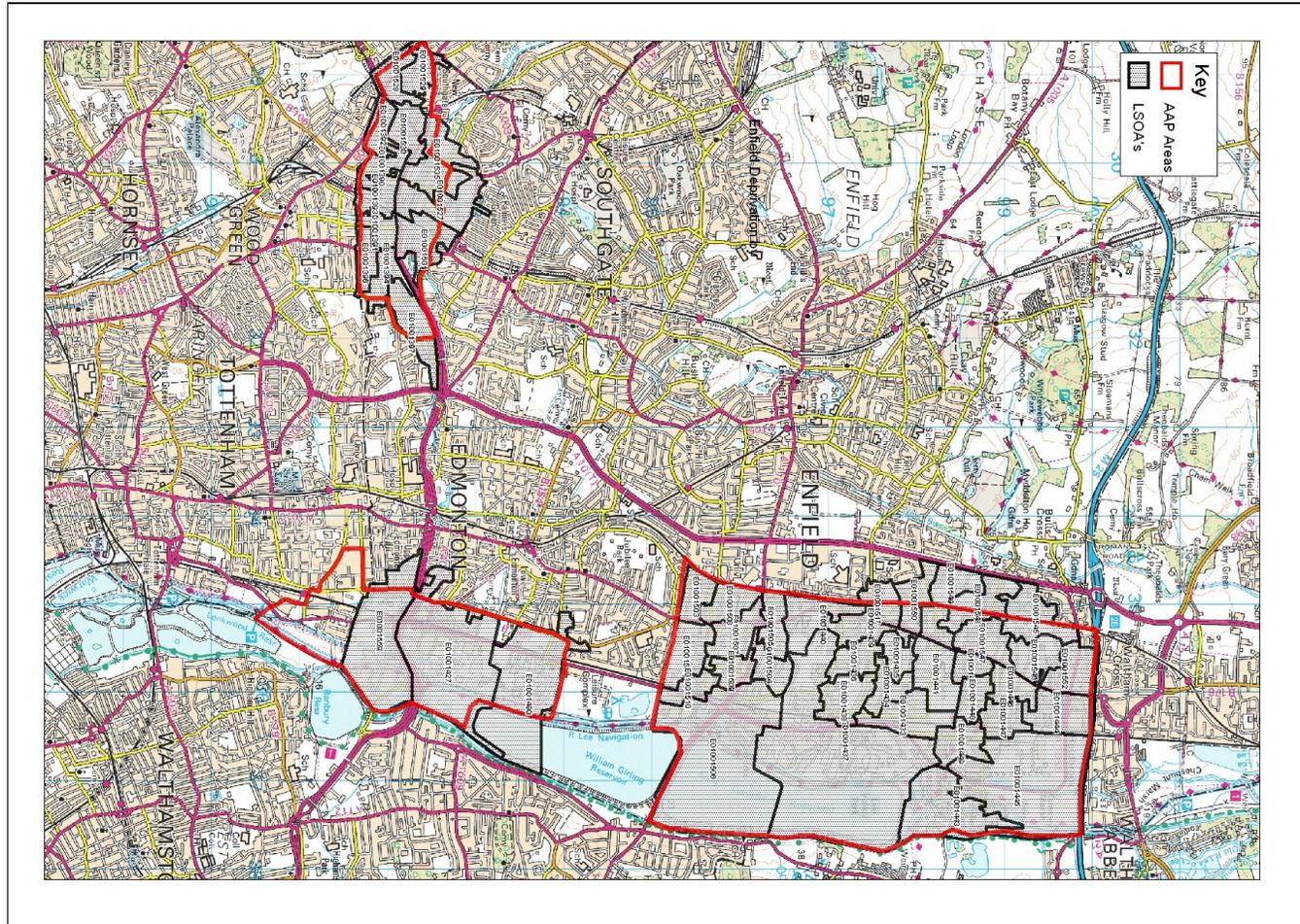


Figure 1-2: Super Output Area definition of AAPs (Source: Halcrow)

2 Context

2.1 Introduction

This section of the report provides a comprehensive context statement for the consideration of employment land in Enfield. Three key constituents of the context are covered:

- Policy Context
- Socio-Economic Context
- Market Overview

Each is presented in turn below.

2.2 Policy context

The UK has a comprehensive hierarchy of planning and economic policies, beginning with national guidance which provides a broad framework for regional plans and strategies through to local development plans and policies.

The Government is currently implementing the reforms to the planning system outlined in the *Planning and Compulsory Purchase Act 2004* with Planning Policy Statements (PPS) replacing Planning Policy Guidance (PPG), Regional Spatial Strategies (RSS) replacing Regional Planning Guidance (RPG) and Local Development Frameworks (LDF) replacing Structure and Local Plans and Unitary Development Plans (UDP).

As a result a range of current, consultation and draft planning and economic policies are relevant to the retention of, and any potential land-use changes to, existing employment land within Enfield. In order to set

the context for this study the key planning and economic development policies at national, regional and local levels have been reviewed and are presented below.

2.2.1 National policies

PPS1: Delivering Sustainable Development, 2005

PPS1 sets out the Government's objectives for the planning system. Sustainable development is the core principle currently underpinning planning. A spatial planning approach, which goes beyond traditional land use planning to integrate policies for the development of land with other policies and programmes that influence places and how they function, should be at the heart of all planning to ensure sustainable development.

The Government is committed to developing strong, vibrant and sustainable communities, including the promoting of a vital, stable and productive economy that aims to bring jobs and prosperity for all. As a result in planning for sustainable economic development, *PPS1* requires planning authorities to:

- Recognise that properly planned economic development can have positive social and environmental benefits
- Recognise the wider benefits of economic development, from the sub-regional level upwards
- Ensure suitable locations for employment uses are available so that the economy can prosper

- Recognise the dynamic nature of local economies and be sensitive to changes and the implications for development and growth
- Ensure the provision of sufficient, good quality, new homes in suitable locations that reduce the need to travel
- Ensure that infrastructure and services are provided to support economic development and housing

To deliver sustainable economic development, the general approach of planning authorities should include: bringing forward sufficient land of a suitable quality to meet expected housing and industrial development needs; and promoting a more efficient use of land through higher density mixed-use development and the use of suitable previously-developed land and buildings.

PPS3: Housing, 2006

PPS3 provides the new national policy framework for planning for housing at the local and regional levels. It provides an enabling framework for local planning authorities, working with their stakeholders, including developers, to deliver both the right quantity of housing to address need and demand in their areas and the right quality and mix of housing for their communities. PPS3, along with other Government housing policy and planning policy statements provides the context for plan preparation in relation to housing development. Other documents due to be published shortly include *“Delivering Affordable Housing – a statement on affordable housing policy”*

PPS3 states four main housing objectives as follows:

- To achieve a wide choice of high quality homes, both affordable and market housing, to address the requirements of the community.
- To widen opportunities for home ownership, and ensure high quality housing for those who cannot afford market housing, in particular those who are vulnerable or in need
- To improve affordability across the housing market, including by increasing the supply of housing
- To create sustainable, inclusive, mixed communities in all areas, both urban and rural.

Below are housing policy objectives. These provide the context for planning for housing through development plans and planning decisions. The specific outcomes that the planning system should deliver are:

- High quality housing that is well-designed and built to a high standard
- A mix of housing, both market and affordable, particularly in terms of tenure and price, to support a wide variety of households in all areas both urban and rural
- A sufficient quantity of housing taking into account need and demand and seeking to improve choice
- Housing developments in suitable locations, which offer a good range of community facilities and with good access to jobs, key services and infrastructure
- A flexible, responsive supply of land – managed in a way that makes efficient and effective use of land, including re-use of previously developed land, where appropriate.

With regards to the latter bullet point, Local Planning Authorities are required to consider a range of incentives or interventions that could help ensure previously-developed land is developed, which includes considering whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development (in accordance with the local Employment Land Review).

PPG4: Industrial, Commercial Development and Small Firms, 1992

PPG4 states that encouraging continued economic development which is compatible with environmental considerations is one of the Government's key aims. Development plans should give industrial and commercial developers and local communities greater certainty about the types of development that will be permitted in a given location and take account of economic considerations by providing for choice, flexibility and competition.

Any approach to employment land needs to take account of the interaction between employment and other land-uses and should encourage such development towards the most appropriate and sustainable locations. *PPG4* identifies that within the local policy framework, employment development should be supported and that due consideration should be given to mixed use development.

PPS6: Planning for Town Centres, 2005

PPS6 encourages the creation of vital and viable town centres as an essential component of successful, thriving, safer and inclusive communities. More sustainable patterns of development can be delivered by ensuring that appropriate locations are fully exploited through high-density, mixed-use development

and promoting sustainable transport choices, including reducing the need to travel and providing alternatives to car use.

By making more efficient use of land and buildings, increasing the density of development where appropriate, it should be possible to accommodate growth within existing centres. Where this is not possible provision should be made by planning for town centre extensions. If a new or expanded out-of-centre facility is considered necessary, it should be addressed through the regional spatial strategy.

PPG13 – Transport, 2002

PPG13 refers to the need for a safe, efficient and integrated transport system to support a strong and prosperous economy. The key employment land objective in planning for transport is to ensure that employment development offers a realistic choice of access by public transport, walking and cycling. Therefore planning policies should aim to:

- Make better use of previously-developed land, including integrating housing and employment development to promote more sustainable transport choices
- Focus major generators of travel demand in city, town and district centres, and near to major public transport interchanges
- Encourage mix-use development to promote walking as a primary mode of travel

2.2.2 Regional policies

The London Plan, 2004

The *London Plan* provides the Mayor's spatial development strategy for Greater London. Borough local development frameworks will need to conform to the strategy. The Mayor's vision for London is presented in the *Plan* as six broad objectives:

1. To accommodate London's growth within its boundaries without encroaching on open spaces
2. To make London a better city for people to live in
3. To make London a more prosperous city with a strong and diverse economic growth
4. To promote social inclusion and tackling deprivation and discrimination
5. To improve London's accessibility
6. To make London a more attractive, well-designed and green city

The *Plan* proposes that the North London sub-region should accommodate 47,000 additional dwellings and 26,000 new jobs by 2016. Policy 5E.1 sets out the following relevant priorities for the sub-region:

- To deliver the London element of the government's priority for the London-Stansted-Cambridge-Peterborough growth corridor
- To identify capacity to accommodate new job and housing opportunities and appropriate mixed-use development
- To improve the variety, quality and access to available employment sites, particularly within Strategic Employment Locations

The Plan includes a range of policy designations that seek to promote sustainable development and direct development to identified locations. These include the following overarching spatial designations:

- **Opportunity Areas**, identified on the basis that they can accommodate substantial new jobs or homes. The Upper Lea Valley in Enfield is identified as an area that should accommodate 10,000 new jobs up to 2016.
- **Areas for Intensification** (none within Enfield)
- **Areas for Regeneration** (including south-east Enfield), where deprivation and social exclusion need to be tackled
- **Strategic Employment Locations**, which contain important concentrations of industrial and warehousing activity

Strategic Employment Locations (SELS) are central to policies for the retention and development of industrial and warehousing employment within the capital and comprise two types of area: **Industrial Business Parks** (IBP), for businesses requiring a high quality environment, (an example of this within Enfield is parts of the Great Cambridge Road employment land clusters); and **Preferred Industrial Locations** (PIL), for businesses with less demanding requirements (Brimsdown in North East Enfield and parts of Central Leaside are PILs).

Outside of SELs, Boroughs should develop local policies for employment sites having regard to their accessibility, quality and fitness for purpose and the potential release of surplus land for other uses to achieve more efficient use of land.

Draft Further Alterations to the London Plan, 2006

The Mayor of London has produced a consultation draft of further alterations to the *London Plan* that acknowledge the continued contraction of London's manufacturing sector. The changes however also recognise that other types of industrial activities require a London location or are important to the wider economy. These include logistics, waste management and recycling, and transport related activities. The importance to London's competitiveness of an efficiently operating logistics system is emphasised, with strategic provision suggested in 'Preferred Industrial Locations' that are well located in relation to the trunk and main road network, rail and water based infrastructure.

The draft alterations also state that the retention of land in industrial use should be justified by integrated strategic and local demand assessments and that a managed approach to the release of land no longer required for industrial use should be undertaken. The document asserts that there is scope for a net employment land release of 39ha per annum over the period 2005 to 2016, mainly in parts of north east and south east London. The land released should be developed for other priority uses, notably housing and waste management.

Strategic Employment Locations are still central to policies for the retention and development of industrial and warehousing employment within the capital. However, it is proposed to rename these areas **Strategic Industrial Locations (SIL)**.

Industrial Capacity – Draft Supplementary Planning Guidance, 2003⁸

The objectives of this draft Supplementary Planning Guidance (SPG) are to provide detailed guidance about how the strategic policies in *The London Plan* should be applied to manage industrial development capacity. The draft SPG seeks to: ensure that sufficient land is available to meet future industrial needs; and bring surplus industrial land back into use to meet the wider objectives of the Plan. Specific guidance of relevance to this study includes:

- The requirement set out in SPG1 is for a positive plan-monitor-manage approach to planning for industrial land using Sub-Regional Development Frameworks. These frameworks need to justify and monitor changes to SELs, and manage a competitive stock of industrial premises while consolidating industry into appropriate locations.
- SPG2 seeks to promote SELs as the prime locations for industrial activity in London and resist the development of non-business uses on these areas.
- SPG3 aims to protect locally important industrial sites outside the SEL framework after testing them against demand.
- SPG4 requires planning authorities to develop criteria based policies to manage the release or retention of other industrial sites and ensure that any release meets wider policy needs (the first priority being for housing). North London Boroughs are classed as a 'Limited Transfer' area where local policies should reflect local difference in

⁸ This guidance remains in draft form.

- supply and demand, rather than adopting a restrictive or permissive approach to release.
- SPG5 refers to a positive approach to consideration of employment led mixed use development on strategically recognised industrial sites or parts of sites, as long as it does not incur a significant net loss of industrial employment capacity.
 - SPG8 promotes distribution facilities in suitable SELs with good transport accessibility.

Industrial and Warehousing Land Demand in London, 2004

This research, intended to inform the final version of the *Industrial Capacity Supplementary Planning Guidance*, confirms the draft SPG estimate that some 50 hectares per annum of industrial / warehousing land can be released London wide in 2001-2016.

The study recommends that employment land release in the North London sub-region is between 90 to 100 hectares over the period 2001 to 2016. This release should relate to a decline in industrial demand and a fall in the level of existing vacant land to bring it in line with a 'natural rate'.

North London Sub-Regional Development Framework, 2006

The *North London Sub-Regional Development Framework* (NLSRDF) presents the strategic development framework for North London, and pays particular attention to the concentration of industrial / warehousing land within Enfield. It noted that between 2000 and 2003 there was a 1.2% decline in the sub-region's industrial stock which comprises, inter alia, a 15% decline in 'industrial' space with a 13% increase in 'warehousing' space. This increase in warehousing has

been most marked within Enfield, which is significant as it is also the sub-regional focus for employment land demand.

Taking account of this strong demand for warehousing land and the emerging requirements for increased recycling and waste management facilities, the document recommends a benchmark release of about 5 hectares of industrial land per annum through to 2016.

It is also envisaged that demand for goods within London will increasingly be met by an efficient wholesale distribution sector rather than by local manufacturing. As a result the designation of **Strategic Logistics Parks** (SLP) should be considered, with good trunk road access being a significant prerequisite. Possible strategically important concentrations of such land could be within areas with good access to the M25, which is likely to include the Upper Lee Valley (especially if improvements to the North Circular and other trunk roads are undertaken).

North London Economic Development and Implementation Plan, (Draft April 2006)

The North London SREDIP establishes four priorities for the sub-region: the Upper Lee Valley (ULV), Town Centres, Transport and Growth Drivers; and four major investment themes to support these:

- *Investment in places and infrastructure* – to accommodate growth and ensure sustainable communities and enterprises in London;
- *Investment in people* – to improve economic inclusion and enable all Londoners to fulfil their potential;

- *Investment in enterprise* – to enable enterprise growth and competitiveness
- *Investment in marketing and promotion* – to make sure what London offers is understood, supported and valued

Of particular relevance to the employment land study is the first investment theme which highlights the importance of the North East Enfield AAP and Central Leaside AAP as opportunity areas, and Enfield's role in the provision of Strategic Employment Locations (SELS). The priorities within this theme include the need for improved transport infrastructure / accessibility; vibrant and sustainable town centres; improved waste management facilities; better access to open space (particularly in parts of ULV); and modest public sector leverage to support physical infrastructure.

Upper Lee Valley: A New Vision, Stage 1 Report (Draft - October 2006)

The document sets out a new Vision for the Upper Lee Valley as *'North London's Waterside, a place for people and businesses, a space to grow... to start and stay'*. The purpose of the Vision includes the restructuring of the economic, transport and housing structure of the area to provide a solid platform for growth and a framework for investment. The successful implementation of the Vision relies on certain major strategic commitments:

- Economic structuring by taking advantage of its location close to central London, the Olympics site and the London-Stansted-Cambridge-Peterborough growth corridor.

- Significant transport investment based on long term thinking but early decisions.
- Improved access to the waterside, park and key infrastructure to transform the image of the area.
- Bold decisions on restructuring the housing stock in terms of scale, stock and accessibility.

Emerging regional policies

We understand that a number of other regional policies are currently under development and will be issued over the next six months. These include the:

- The ***North London Development and Investment Framework*** covering Barnet, Enfield, Haringey, Redbridge and Waltham Forest is currently being prepared and is being coordinated by the London Development Agency (LDA). This document will present a strategic development framework for the area, identify key investment requirements and be a key document covering the London section of the London-Stansted-Cambridge-Peterborough Growth Corridor (similar to the *London Thames Gateway Development and Investment Framework*). Draft versions should be available during autumn 2006 with the final version to be produced in spring 2007.
- The Greater London Authority (GLA) is also currently undertaking the preparation of an ***Upper Lee Valley Opportunity Area Planning Framework*** which will cover Barnet, Enfield, Haringey and Waltham Forest.

2.2.3 Local policies

Enfield Unitary Development Plan, 1994

The *London Borough of Enfield UDP* provides a framework for managing development within Enfield and sets out the Council's policies and proposals for the development and other use of land.

Part 1 of the UDP covers employment and economic development policies with key policies including:

- Policy (I) E1, which aims to foster Enfield as a location for business
- Policy (I) E2, which seeks to retain and enhance areas that provide commercial, industrial and distribution employment
- Policy (I) E3, which has regard to retaining and providing accommodation for small-scale developments
- Policy (I) E4, which seeks to facilitate the most efficient use of land within the employment generating areas

Within Part 2 of the UDP the key policies are:

- Policy (II) E2 seeks to concentrate activities in Use Classes B1 to B8 within identified **Primary Industrial Areas** (PIA)
- Policy (II) E3 encourages office development to locate in Preferred Office Locations
- Policy (II) E6 and Policy (II) E9 refer to giving favourable consideration, in general, to proposals for the diversification or redevelopment for housing of industrial and warehousing premises outside PIA, subject to the supply of employment land and demand for premises

Interim Amendments to the UDP, 1999

At the inquiry into objections to the UDP, the Inspector questioned whether PIAs could properly fulfil the role of accommodating industrial and business uses and recommended that an employment demand and supply study is undertaken to further assess provision. The findings of this study culminated in the employment land proposals contained within the *UDP Interim Amendments 1999*, which subdivide employment areas into three categories:

- **Prime Employment Areas** (PEA) comprising those areas containing large sites and good quality developments, and / or well located to transport infrastructure and/or capable of providing a quality business environment. The policy aim is to retain and enhance existing PEA, develop new PEA to attract inward investment / relocations, and to restrict use to Classes B1, B2 and B8.
- **Local Employment Areas** (LEA) comprising those areas catering for more locally based businesses, are capable of providing a wide variety of sites and premises, and are reasonably well located to transport infrastructure. While policy is to resist change of use in these areas, favourable consideration could be given subject to the general availability of sites / premises and the compatibility of the proposed use with employment uses in the LEA.
- **Other Employment Areas** include all sites and premises within Use Classes B1, B2 and B8 situated outside the PEA and LEA. Within these sites redevelopment for other uses, particularly housing, would generally be favourably considered by the council.

2.3 Socio-economic context

This section briefly sets out the prevailing socio-economic conditions in Enfield, and reviews how Enfield's position compares to London and England. *Due to unavailability of data at Super Output Area level, similar analysis for the AAP areas is only limited to review of local population and employment bases.*

2.3.1 GVA, prosperity, productivity and earnings

Great Britain experienced a 67.3% growth in Gross Value Added (GVA) over the ten-year period of 1991 to 2001 with a total GVA of £842 billion in 2001. Greater London marginally exceeded the national growth rate with an increase of GVA by 69.6% over the same period. Of the North London borough's, only Barnet exceeded the national and London-wide GVA growth with 73.4%; Enfield has underperformed relative to the national trend with a growth rate of 30.9%⁹.

Greater London performs stronger than national average for prosperity and productivity with values per person at £20,700 and £33,500, respectively. As functions of GVA, prosperity and productivity rates are lowest for Waltham Forest and Enfield, and higher for Barnet and Haringey though still at rates significantly lower than Greater London. Low prosperity and productivity rates will have far-reaching socio-economic impacts in term of local wealth of residents, composition of local business stock, attraction of the area for business start-up or relocation, etc.

⁹ Source: NLELS (2006)

The 2005 Annual Survey of Hours and Earnings: Workplace Analysis suggests an average gross weekly wage rate of £556 for London. This is considerably higher than the national average of £436. However, all four North London boroughs have earnings well below the Greater London value, which may imply potential for wage increases with changing industrial structure.

Table 2-1: Average Weekly Wages (2005)

Area	Workplace-based gross average weekly wage	Residence-based gross average weekly wage
England	£436.3	£437.6
London	£555.8	£527.0
Enfield	£458.3	£492.6

Source: Annual Survey of Hours and Earnings: 2005, NOMIS

Average weekly wages in Enfield, whilst relatively high within the national context, are significantly lower than those in London as a whole (for both workplace and resident wages). Indeed, workplace average wages are just 82% of the London level and residence based wages just 93% of the capital's average. Comparison with other North London boroughs shows that both Barnet and Haringey demonstrate higher average wage rates than Enfield, while those in Waltham Forest are marginally lower.

2.3.2 Population profile

In 2001, the population of Enfield as recorded by the 2001 Census stood at 273,563, the second highest population in North London after Barnet. From 1991 to 2001 Enfield has shown an overall population increase of 6.3%, compared to growth of 8.2% within Greater London and 7.2% for North London.

Table 2-2 shows the percentage of Enfield's total population which resides in each of the three AAP areas (as defined in **Figure 1-2**). The data suggests that 16.7% of Enfield's population is located in the North East Enfield AAP area, in comparison to just 6.8% and 1.7%, respectively, in the North Circular and Central Leaside areas.

Table 2-2: Percentage of Enfield's population located in the three AAP areas

Figure 2-1 shows the age structure of the population and how it has changed in the period 1991-2001. Due to unavailability of population trends data at Super Output Area level, our analysis for change in population is limited to changes at the borough level. It suggests that the number of 20-29 year olds in Enfield has declined from 1991 to 2001. This pattern is mirrored in national trends. There has however been an increase in the amount of 30-39 year olds in the same period. Approximately 59% of Enfield's population fall into the 20-64 age group category.

2.3.3 Economy and the labour market

Total employment

ABI (2004) data shows that there are a total of 22.5 million workplace jobs in England. 17.5% of these are located in London and 2% of these London jobs are based Enfield. There has been a 6% decline in the number of workplace jobs in Enfield from 2000 to 2004, compared to a 3% decline in the in the London region and a national growth of 3% over the same period.

Table 2-3 shows that out of 91,608 workplace jobs within the Borough of Enfield, 17% of them are located in the North East Enfield area, 6% in Central Leaside are and 4% in the North Circular AAP area.

AAP Area	Total Population	% of Enfield's total population
Central Leaside	4,660	1.7%
North Circular	18,708	6.8%
North East Enfield	45,579	16.7%
Enfield	273,563	100.0%

Source: Census 2001, NOMIS

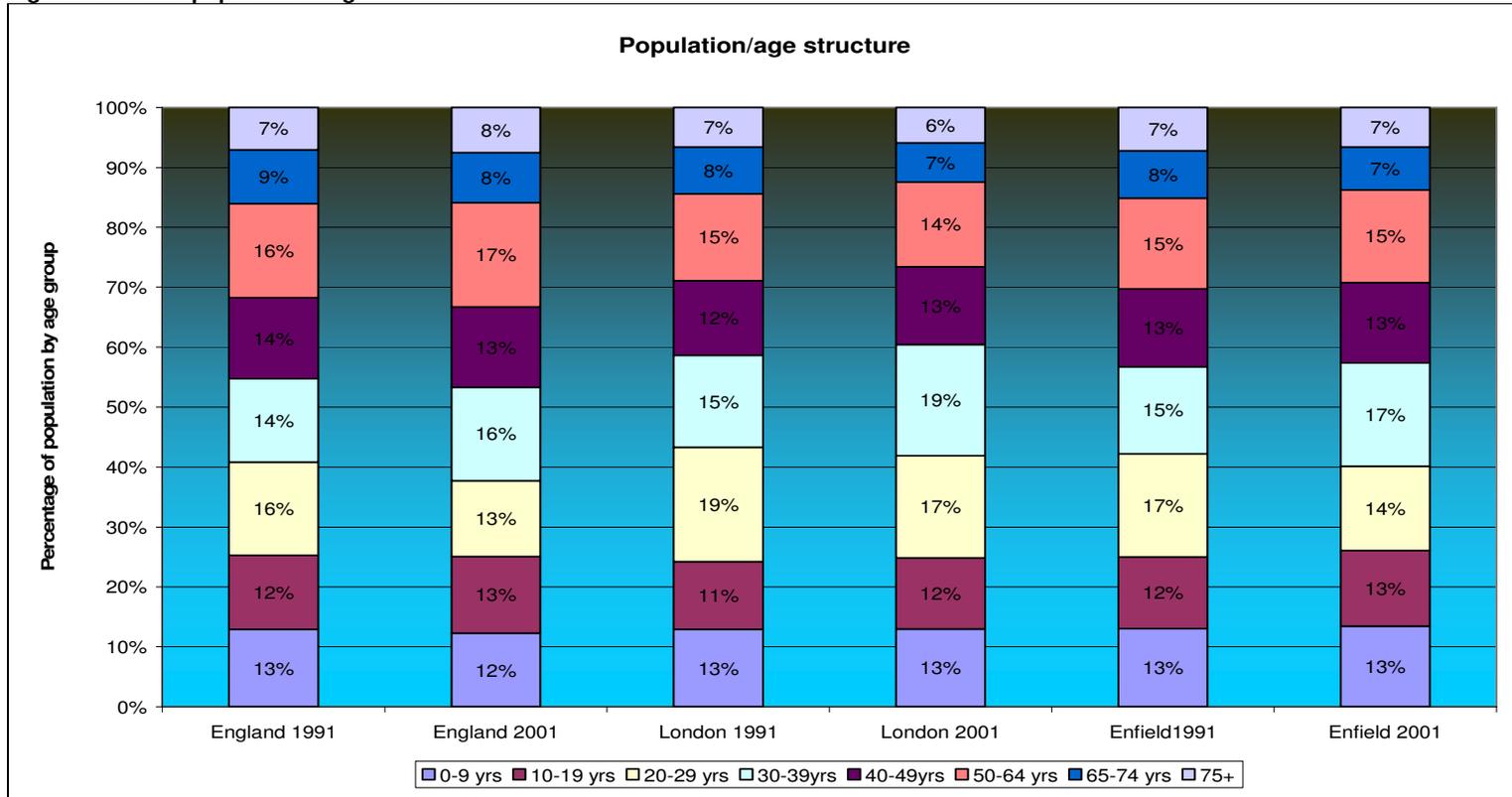
Table 2-3: Nos workplace jobs located in Enfield AAPs

Area	Number of workplace jobs	% of total jobs in Enfield
Central Leaside AAP	5,071	6%
North Circular AAP	3,253	4%
North East Enfield AAP	15,460	17%
Enfield total	91,608	100%

Source: ABI 2004, NOMIS

Table 2-4 shows employment by economic sector in 2004. Employment in Enfield is largely dominated by the service industry with just over 26% employed in the distribution, hotels and restaurants sector and almost 28% employed in public administration, education and health. The nature of employment in the three AAP areas is clearly different from that seen at the borough level, with strong representations of distribution industries and manufacturing industries. Additionally, Central Leaside and North East Enfield AAP areas have an over representation of transport and communication sector. Mirroring the national and regional trends, employment in Enfield's manufacturing sector has declined considerably. On a positive note, **employment in public administration and distribution has increased significantly.**

Figure 2-1: Local population's age structure



(Source: Census 1991 and 2001, NOMIS)

Table 2-4: Employment by economic sector 2004

Industry	England	London	Enfield	Central Leaside AAP	North Circular AAP	North East Enfield AAP
Agriculture and fishing	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%
Energy and water	0.5%	0.2%	0.3%	0.0%	0.0%	0.2%
Manufacturing	12.0%	5.5%	8.0%	24.9%	11.2%	19.4%
Construction	4.5%	3.0%	5.3%	9.5%	2.9%	5.8%
Distribution, hotels and restaurants	25.0%	22.3%	26.2%	31.3%	27.1%	34.7%
Transport and communications	6.1%	7.7%	7.2%	12.2%	2.9%	13.9%
Banking, finance and insurance, etc	20.7%	31.6%	18.6%	6.8%	25.4%	11.9%
Public administration, education & health	25.9%	22.7%	29.7%	7.6%	25.5%	11.0%
Other services	5.1%	7.0%	4.5%	7.7%	5.0%	3.1%

Source: Annual Business Inquiry Data 2004 – Workplace analysis, NOMIS

Table 2-5: Percentage changes in employment from 2000-2004

Industry	England	London	Enfield
Agriculture and fishing	-5%	-52%	-47%
Energy and water	-28%	-34%	-90%
Manufacturing	-18%	-24%	-36%
Construction	6%	-11%	5%
Distribution, hotels and restaurants	5%	-1%	6%
Transport and communications	-1%	-4%	-12%
Banking, finance and insurance, etc	4%	-8%	-15%
Public administration, education & health	13%	12%	14%
Other services	6%	5%	-3%
Total	3%	-3%	-6%

Source: Annual Business Inquiry Data 2004 – Workplace analysis, NOMIS

Economic activity

The latest data from NOMIS (October 2004 – September 2005) suggests that the economic activity rate for 16+ population in Enfield is just over 63%. This is almost identical to the national and London averages (Table 2-6).

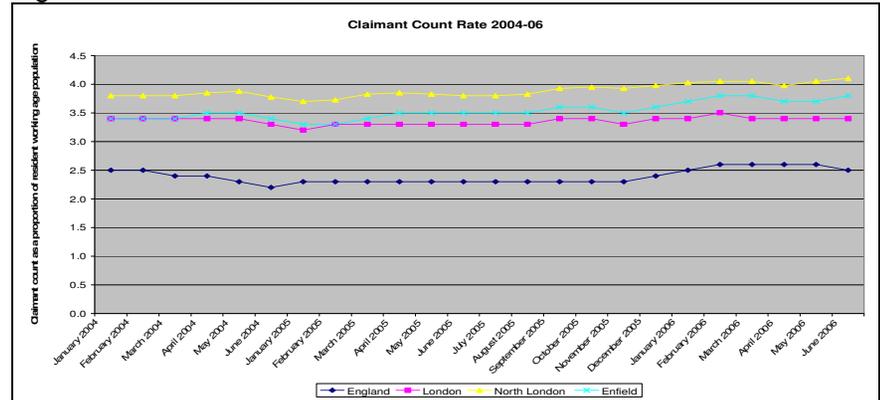
Table 2-6: Economic Activity Rate

Area	Economic Activity Rate: 16+ (%)
England	63.0%
London	63.8%
Enfield	63.6%

Source: Annual Population Survey 2004/05, NOMIS

In the absence of any data for unemployment at ward level, the claimant count rate measured as a proportion of the resident working age population at local authority level, is used as a suitable proxy. It suggests that the claimant count rate for Enfield is higher than both the England and London average. However it should be noted that various factors may lead to some people not registering on the claimant count register hence there is the possibility that these figures are not representative of the “real” extent of unemployment in the area. The graph suggests that there has been a continuous increase in unemployment in Enfield from Dec 2005.

Figure 2-2: Claimant Count Rate



Source: Claimant Count Register 2005/06, NOMIS

Figure 2-3 shows some of the most disadvantaged communities in England in terms of employment deprivation are located in the AAP areas in Enfield particularly in the Central Leaside AAP Area.

2.3.4 Education and skills

Table 2-7 shows secondary school achievement levels in Enfield and compares them to the national average. It indicates that at GCSE level almost 52% of pupils are achieving 5 or more A*-C grades in Enfield which is almost 6% lower than the national average. At GCE/VCE Level Enfield is performing significantly lower than the national average with an average point score per student of 227 points compared to 278 at the national level.

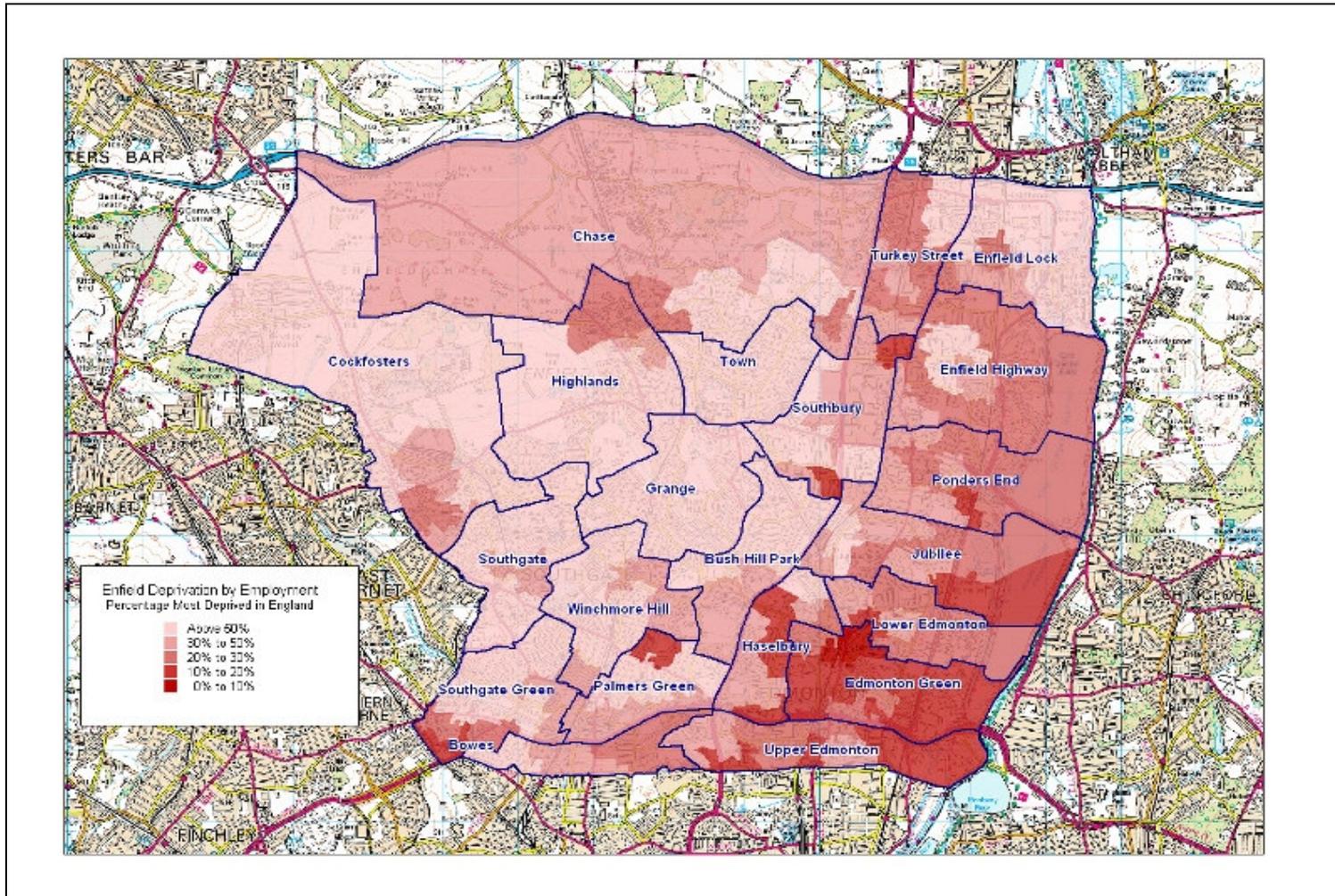


Figure 2-3: Employment Deprivation (Source: Indices of Deprivation 2004, ODPM)

Table 2-7: Secondary school achievement levels 2005

Indicators	Enfield	England
GCSE: Average total point score per pupil	332.8	355.2
GCSE: % of pupils achieving 5 or more (A*-C)	51.7	57.1
GCE/VCE: Average point score per student	227.7	277.8

Source: www.dfes.gov.uk

Table 2-8 shows the skills base of the local workforce. It indicates that just over 22% of Enfield's working age population have a degree or higher qualification which is just slightly below the national average. However in comparison to the region and North London, Enfield has a below average population with higher level qualifications.

Table 2-8: Skills base of the local working age population

Area	Higher Level Qualifications	No Qualifications or unknown
England	25.0%	14.8%
London	30.8%	13.9%
North London	30.1%	30.1%
Enfield	22.3%	17.1%

Source: Annual Local Area Labour Force Survey and Census 2001

The skills levels of the local workforce influence an area's occupational and wage structure. These consequently impact on the output and productivity of an area. **Figure 2-4** shows the level of education and skills deprivation in Enfield and highlights that some areas of the Borough of Enfield are within the top 10% most national deprived in terms of skills and education.

Occupational structure of the workforce

Table 2-9: Local Occupation Structure

Area	% employed in high skilled jobs	% employed in low skilled jobs
England	41.9	18.7
London	52.1	13.5
North London	49.8	13.7
Enfield	43.6	20.2

Source: Annual Local Labour Force Survey 2003, Census 2001

Table 2-9 above shows the occupational skills structure of the workforce in Enfield. It indicates that at 43.6% the proportion of the working age population employed in high skilled professions such as managerial, professional, associate professional and technical occupations is lower than the London average (52.1%) but slightly higher than the national average which stands at 41.9%. The table indicates that just over 20% of Enfield's population are employed in lower skilled jobs such as elementary/routine jobs and process/plant/machine operations. This is above the national average of 18.7%.

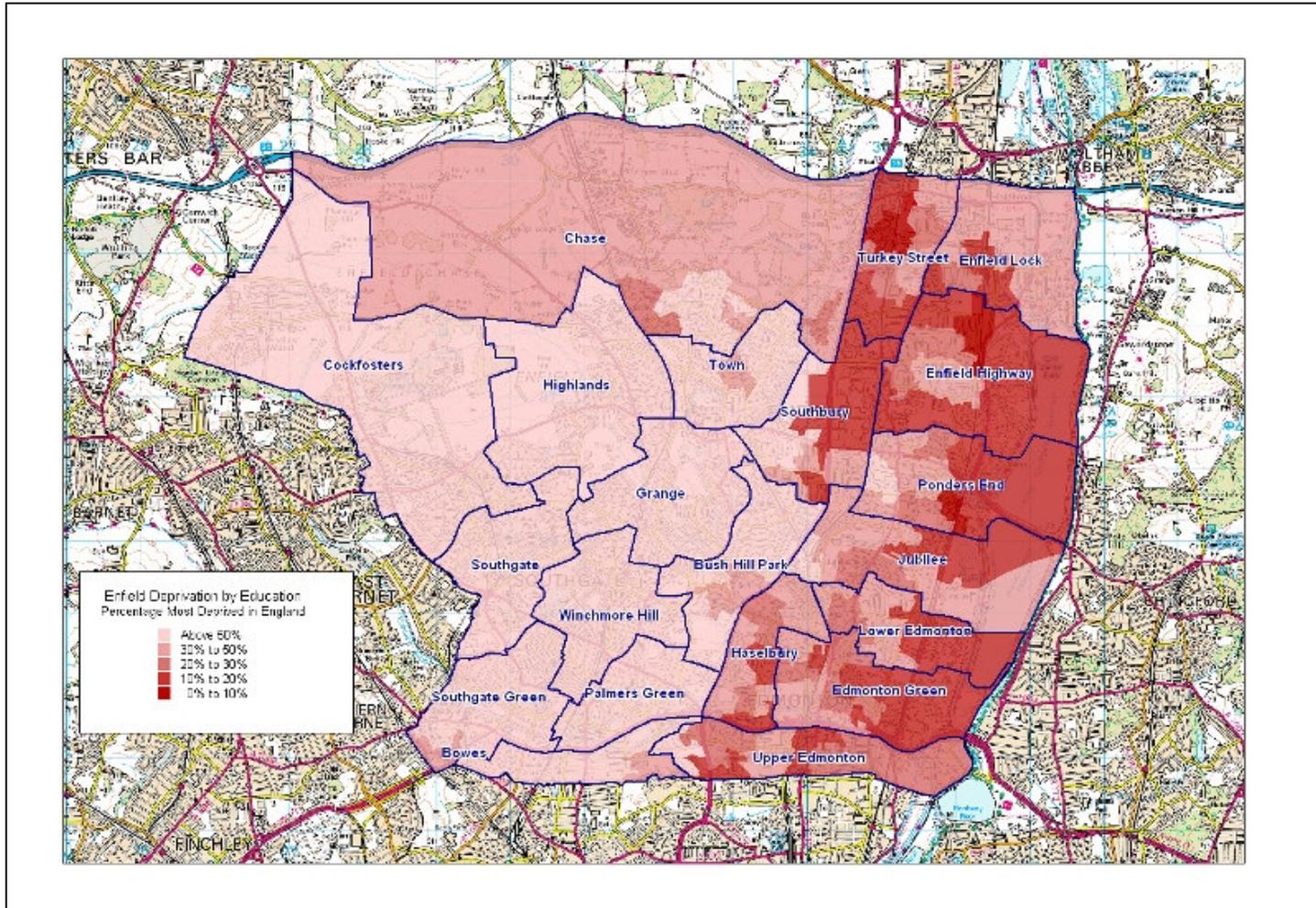


Figure 2-4: Education and Skills Deprivation in Enfield (Source: IMD 2004, ODPM)

2.3.5 Enterprise development

Self employment

According to NOMIS, just over 18% of those residing in Enfield are self employed. This is higher than the national average of 13%

Table 2-10: Self Employment in Enfield

Area	Self Employed (%)
England	13.1%
London	16.1%
Enfield	17.8%

Source Annual Population Survey, NOMIS

VAT registration levels

Recent trends show how registration rates have converged since 2000, having been higher than London-wide and national averages. In 2003, all North London boroughs showed business VAT registration rates of over 10% in relation to their total business stock. However because de-registrations were also high Enfield recorded a net loss in its business stock. The de-registration rate in the borough was 11.6% which resulted in a net loss of 130 businesses.

2.3.6 Social deprivation

In the indices of deprivation 2004, Enfield was ranked as 104th most deprived out of 354 local authorities in England therefore it falls just outside the top 30% most deprived Local Authorities in the Country. **Figure 2-5** shows the three AAP areas within Enfield, North East Enfield, Central Leaside and North Circular appear to be suffering from particular disadvantage showing that these areas are suffering from a very high level of social and economic deprivation. Some key factors leading to economic deprivation may include poor

economic activity levels, high unemployment, poor skills base, an occupational structure dominated by low skilled jobs and below average wage rates. Some of the key social problems presently faced by local communities include high incidence of crime and suggest a relatively poor “quality of life” for many residents in the AAP areas.

Health

Health conditions of an area’s residents certainly provide a good indication of quality of life. Chronic ill health and permanent sickness affects significant sections of the population resulting in high unemployment and economic inactivity. The results of the IMD 2004 suggest that some wards in Enfield appear to be suffering from poor health conditions particularly those located in the North East Enfield AAP area and the Central Leaside AAP area.

Crime and disorder

Parts of Enfield also suffer from high crime rates and fear of crime which can consequently have a knock on effect on the confidence of the area’s businesses. The “crime and disorder” theme of the IMD measures the incidence of recorded crime in burglary, theft, criminal damage and violence at SOA level. The findings suggest that parts of the North East Enfield AAP area and the Central Leaside AAP area are some of the worst crime hotspots in the country.

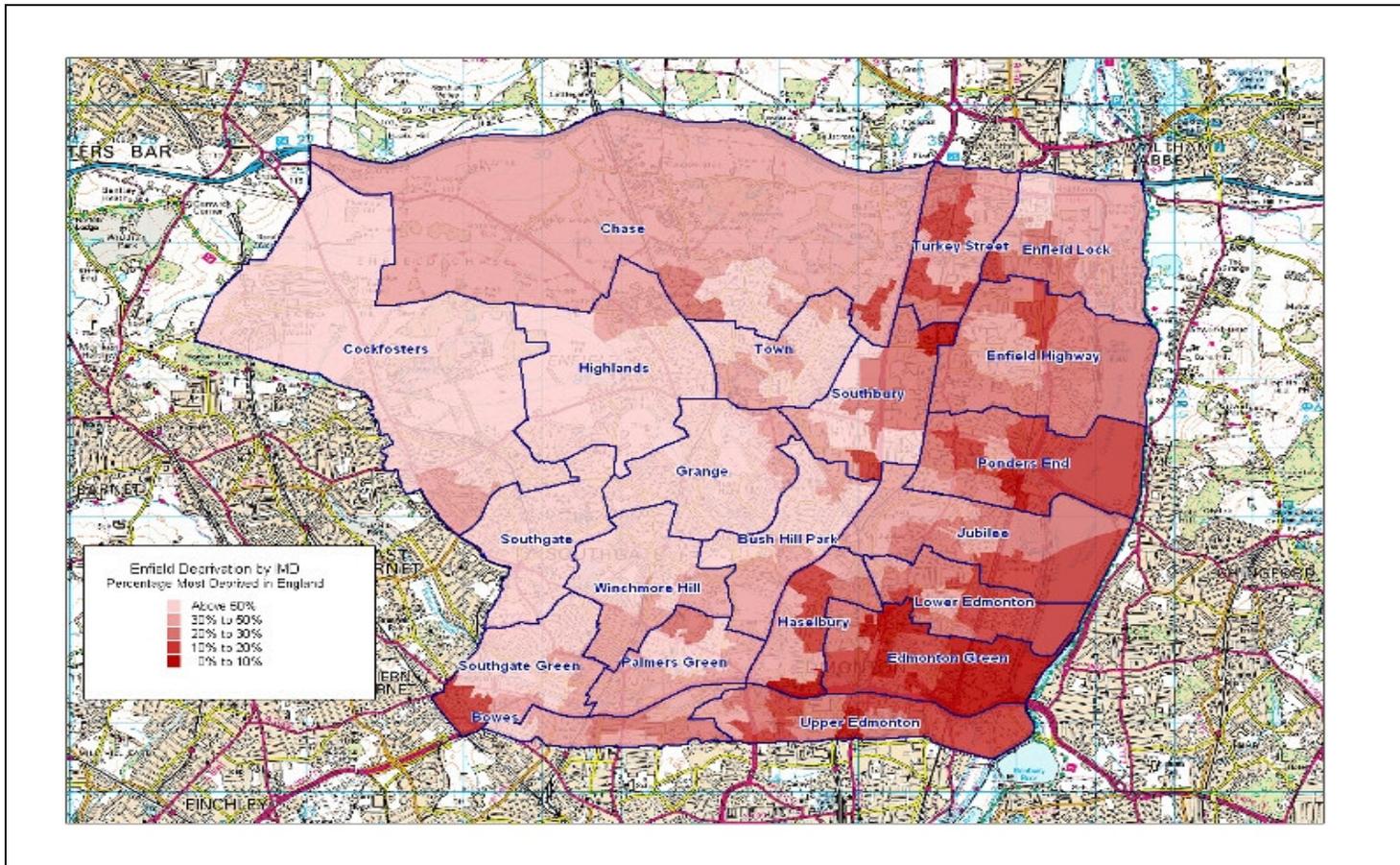


Figure 2-5: Aggregate deprivation in Enfield (Source: IMD 2004, ODPM)

2.4 Enfield property market overview

Enfield has one of the largest commercial / industrial centres in London, mainly due to Brimsdown which is believed to be the second largest concentration of industrial buildings outside of Park Royal in West London.

The major industrial / commercial zones are concentrated along the A1055 (north south route) which is effectively a corridor running against the borough's north eastern boundary, and the smaller cluster around Southbury Road / A10. The benefit of such clearly defined industrial / commercial areas is that pressure to transfer uses of this valuable commodity into other uses are not easy to achieve, thus concentrating development interest on those opportunities which are generally smaller and within the core residential zones.

Enfield, in line with the vast majority of South East England has seen a huge decline in the true manufacturing industries over the last decade or so. This is a national trend and one which is probably irreversible given the comparatively low labour and transport costs associated with production available in the developing world. In the borough however the gap in employment terms has been largely filled by the trend for business diversification into distribution, re-packaging and service sector.

Enfield Town is perhaps the main focus of the borough with its wide range of shopping facilities and civic offices although retail and leisure facilities are spread

throughout the borough, including the medium sized retail element at Edmonton Green.

In terms of road access, the borough has benefited from major London wide infrastructure improvements including M25 improvements and the upgrading of the North Circular Road which, when combined with the established A10 dual carriageway, allows movement north-south through the borough into key central London areas or via the motorway network to all major routes. The borough is also relatively accessible to the major airports of Luton, Stansted and eastwards towards the ports of Tilbury, Felixstowe and Harwich. However, congestion remains a major problem in the area, particularly on the M25 and North Circular Road, and there is no direct link to the M25 in the north-east of the borough.

Aside from numerous bus routes, the LBE public transport system is generally focused around over-ground railway although there are Piccadilly Line stations to the north west of the borough in Oakwood, Cockfosters and Southgate. Over-ground services run from Enfield Town, Enfield Chase, Enfield Lock and Southbury stations, passing through the borough with various other stops terminating at Moorgate, Liverpool Street, and Kings Cross (via Hadley Wood).

2.4.1 Key market sectors

Industrial / warehousing

Given the size of Enfield as a borough and the sheer quantity of industrial stock, we perceive the major component parts of the Enfield industrial / warehouse market is in three specific sub-markets:

- **Enfield (A10 / Great Cambridge Road)** – this area, which includes Great Cambridge Road and areas off Southbury Road and Lincoln Road, is home to much of the historic manufacturing land use which has shifted in the last ten to fifteen years towards warehouse and distribution, and retail warehousing. A number of the redundant 1930s industrial buildings along the A10 have in recent years been redeveloped and have evolved into a “cluster” of main car dealerships. Similarly the area south of the British Car Auction (originally Weston Aerospace) has been developed into retail warehousing. Adjacent to this are Baird Road and Crown Road where a significant number of industrial occupiers still remain. This area has begun to redevelop through market forces with older buildings being demolished and replaced by newer industrial “schemes”, currently two developers have construction underway in this location. Further south on the A10, significant re-development has recently taken place and a new BMW main dealership showroom had been created. The GE Lighting premises at the junction of Lincoln Road / A10 is still occupied, although the closure of GE Lighting has been announced and it is anticipated the site will come to the open market on a freehold for sale basis in the near future. Adjacent is the 1980s Great Cambridge Estate with the recent addition of A10 Exchange by Brixton Plc, the first new small/medium unit industrial scheme in LBE for some six or more years.
- **Brimsdown** – is one of London’s flagship industrial areas, believed to be the second largest after the Park Royal Estate in west London. The area has seen significant improvements over the last decade and now offers a high quality location for businesses. The area is home to numerous individual industrial estates and stand alone buildings including Trafalgar Business Centre, Delta Park, Arena Point, The Dencora Centre and Sovereign Business Centre. In the autumn of 2005 Rugby Plc purchased the investment known as Ponders End Industrial Estate, totalling in the region of 24 acres. The core estate will be intensively managed and refurbished, the adjacent area on East Duck Lees Lane will be subject to a planning application for up to 60,000 sq ft of new industrial / warehouse buildings. Slightly to the north, off Jeffreys Road, GLE are constructing some 45,000 sq ft of new small industrial units with two further phases of development to follow.
- **Central Leaside** – Located to the south of the borough and benefiting from good road links to the A406 North Circular Road, this area is perceived by both the occupier and development sector as a strong industrial / warehouse location. This is reflected by significant development activity at the current time which (ignoring the recent construction of Ikea), includes the sale of the

former BOC site fronting the A406 (14 acres), and the former Parker Knoll premises (approximately 4 acres). Both these redevelopments will significantly enhance the industrial / commercial sector alongside the A406 in Edmonton and over the course of time this will undoubtedly incorporate areas such as Stonehills Business Centre, Hastingwood and Lee Valley Industrial Estates.

The property crash of the early 1990s effectively called a halt to all speculative commercial development in the borough and the first new industrial buildings developed (without pre-lets or pre-sales) was circa 1997. Subsequent to that there have only been a handful of further “schemes” but a number of opportunities are now beginning to arise following developers purchase of sites or buildings. Of specific note is the Brixton Plc scheme at A10 Exchange, which was completed on a totally speculative basis and extends to some 96,000 sq ft. Early lettings show that there is a demand from occupiers for quality space and that rents necessary to undertake such development are achievable with effort.

Some additional new developments underway as mentioned above would include:

- **Chancerygate / Big Yellow** – The redevelopment of the former Parker Knoll site on the A406. Big Yellow Self Storage is now constructed and Chancerygate Developments Ltd is now on site where they will be building ten industrial units.
- **GLE / Jeffreys Road** – The first phase of the small units will be complete in November 2006.

Phase two is likely to comprise one or two units up to 30,000 sq ft whilst phase three is aimed at the current time towards those being relocated from the Olympic zone and is a development undertaken in cooperation with the LDA.

- **Aztec 406** – Bestway Cash & Carry have purchased the last remaining site at this location and have consent for their own cash and carry unit totalling some 80,000 sq ft. Plans for additional speculative warehousing space are drawn up ready for submission which will total a further 80,000 sq ft in approximately four units.
- **Crown Road** – Following the success of their original development housing Selco Builder’s Merchants and Renault UK Ltd, Kier Developments will shortly commence construction of phase two comprising three warehouse buildings of between 20 and 40,000 sq ft. Adjacent, developer Canmore have commenced construction of 100,000 sq ft which has been pre-let to a single occupier.

With regards to current market rents for industrial property (up to 40,000 sq.ft.), Grade A stock can attract up to £9.00 per sq.ft. while low grade stock attracts around £6.50 per sq.ft. For larger Grade A premises rents are around £8.00 per sq.ft.

Commercial / offices

For historic reasons the North Eastern sector of London has not seen a huge demand for office space in the last fifteen years, with the demand for central London focusing towards the west London area. Thus office demand in the borough has tended to come almost

entirely from companies who are historically situated in this area and local service companies such as solicitors, accountants plus the usual local authorities. Critically, occupier demand has not led to the strengthening of rent which makes office development unviable in this borough.

Within Enfield there are very few locations which could be defined as office “zones”. At Innova Park, Mollison Avenue, Enfield, is the only recently built office stock. Innova House, constructed approximately five years ago is part of a joint venture between Scarborough Plc and LBE totalling some 30,000 sq ft and is approximately 75% occupied. On the same site are two buildings originally known as BIC1 and BIC2 which failed as innovation centres and are now let as workshops/small business units.

In early 2006 Scarborough Plc sold the investment of Innova House and BIC Two (renamed Workzone) to an investment company subsequent to which there have been further lettings at Innova House but none that would generate enough confidence to begin any further speculative development of a similar sized building in that location. At the same site Scarborough Plc retain two smaller land areas, one of which has recently gained consent for a development of pavilion style office units which are to be sold on a freehold basis. Construction on these will be commencing shortly. The remaining land to the southern end of Innova Park is the subject of debate regarding future residential development whilst on part a specialist school / academy is being constructed.

Within Enfield Town itself are a number of individual multi storey office buildings at River Front and Southbury Road. These are of mixed age varying from 1960s construction up to mid 1980s, the majority of which would not meet the specification required for Grade A office occupiers. A majority of these buildings were originally occupied by single companies as head office or similar but due to change in business structures across the region most of the offices in this area are now multi-let on a floor or part floor basis.

Any remaining office stock tends to be highly fragmented and scattered around the borough in locations that are either close to the rail network or where buildings were specifically constructed for companies in the past that had an established history in the borough.

There are currently no specific requirements for office occupiers in excess of 10,000sq.ft in the borough. The majority of demand comes from smaller office occupiers (sub 1,000 sq.ft.) and more specifically for self contained offices space which has lesser outgoings in terms of service charges when compared to multi let buildings or office floors. There is a strong bias towards freehold self contained office purchases on the proviso that these have good parking ratios. Offices without adequate parking provision do not let or sell well within the borough.

Current rents range from Grade A office at £15 per sq.ft. to £10 per sq.ft. for the lowest quality (i.e. above shops).

Retail

Whilst, in line with most locations in the UK, there are numerous retail outlets throughout the borough, the main core areas would be Enfield Town and Edmonton Green, all other locations within the LBE could not be classed as “shopping centres” albeit these secondary and tertiary shop units are in the main well occupied with very little obvious vacancy.

Edmonton Green Shopping Centre would be considered more of a “local” facility and, having fallen out of favour with retailers in recent years it is currently being sensibly redeveloped as a joint venture with St Modwen incorporating a substantial element of new residential.

The main centre of retail activity in the borough is, as ever, concentrated on Enfield Town. The shopping facilities have tended in the past to develop naturally along Church Street and London Road, improved by the development of the original Palace Gardens and completion of Palace Xchange, a joint venture by ING Real Estate Development and the London Borough of Enfield. This, coupled with the major town centre road improvements will benefit Enfield as a borough. The new shopping centre will connect to the existing Palace Gardens in Enfield Town, and thus Church Street, creating 22 new retail units along with the 550 space multi storey car park. It is reported that 75% of the new retail spaces are pre-let with major names such as Top Shop, Next, Superdrug and TK MAXX believed to be involved. This will not only boost the existing tenant’s trade by increased local use from local residents, but see an increase in customers from further a field. The

improved Enfield Town Centre should at least be able to compete with some of the larger centres in the region.

In terms of retail rents, new shopping centre Zone A’s are around £170 ITZA, older centre Zone A’s at £140 ITZA, and areas such as Church Street around £95 ITZA.

Residential

Understandably, given that it is a London conurbation edged by the Metropolitan greenbelt, and more recently by the M25, the London Borough of Enfield would undoubtedly be considered a densely populated residential area, albeit it does benefit from significant pockets of green open space. Due to its density there have been few significant residential schemes created. The exceptions would be Enfield Island Village, near Enfield Lock to the north of the borough and Highlands Village in Winchmore Hill. The former was created over a number of years on land formerly part of the Royal Ordnance site which is a mix of private and social housing. Highlands Village is again a mix of private and social housing (incorporating a small Sainsburys supermarket and the Village Hall). This development was a former hospital site and incorporates some converted buildings and a significant element of new build.

To the south of the borough, recent schemes have included the Social Housing Development on the former MK premises at Edmonton and the Edmonton Partnership Initiative (EPI) scheme in Montagu Road, Edmonton.

As at summer 2006, Fairview are close to completing their redevelopment / conversion of the offices and area surrounding in Carterhatch Lane formerly occupied by Eastern Electricity and there have been other medium sized redevelopments such as those seen at the former Polar Ford premises in Lancaster Road.

Overall the borough, being well located and popular, consistently sees growth in residential prices in line with, or above, the so called national averages. Pending the effects of the recent interest rate rise there still appears to be a relatively insatiable demand for all types of residential property. Based on Land Registry data, the median house price in Enfield in 2005 was £200,000, an increase of 286% from £70,000 in 1996.

3 Business needs and requirements

This chapter provides an overview of the opinions and needs of local businesses in relation to business activities premises and forward strategy.

3.1 Survey response, results and analysis

As part of this study an extensive telephone survey was undertaken to identify the nature and needs of existing business activity in the area. A good response rate was achieved with 18% of the businesses listed responding to the survey, resulting in a survey sample of 136 businesses. The respondents were located from across the borough, as shown in the table below.

Table 3-1: Number of Employees

Postcode District	%
EN1	9
EN3	51
N9	4
N11	1
N14	6
N18	29

Source: Enfield Business Survey, 2006

3.2 Business characteristics

Business activity

There are a wide range of businesses in the area, with no dominant activity. 11.8% of businesses are involved in manufacturing as their primary activity. The type of manufacturing ranges from the manufacture of tools to

optical equipment. Wholesale was the next most common type of activity, with 6.6% of business stating this as their primary activity.

Business size

As **Table 3-2** shows the predominant type of the businesses in the area are SME's, 76% of businesses surveyed were identified as small firms, with a further 7.4% in the small to medium category. 8.1% of companies had 100 plus employees.

Table 3-2: Number of Employees

No. of employees	%
1-10 employees	44.9
11-30 employees	31.6
31-50 employees	7.4
51-100 employees	7.4
101+ employees	8.1

Source: Enfield Business Survey, 2006

Site characteristics

Single operators (62% of respondents) are the most common form of business located in the area, with a further 24% of companies belonging to UK chains. Only 4% of businesses were operations where the headquarters are located outside the UK. What this characteristic demonstrates is a market that is UK orientated in Enfield.

Table 3-3: Site type

Site type	%
A single site (no related operations elsewhere)	61.8
A national, regional or divisional headquarters co-ordinating business operations across two or more sites	9.6
A branch, subsidiary, or division with headquarters elsewhere in the UK	24.3
A branch, subsidiary or division with headquarters outside of the UK	4.4
Total	100

Source: Enfield Business Survey, 2006

With regards to current floorspace, **Figure 3-1** shows the size distribution among respondents. There are a range of requirements in the industrial and warehousing sector, but with identified peak in provision of 1,001 – 2,000 m² and 10,001+m². Within the sample, 26% of respondents did not know the size of floorspace at their current site.

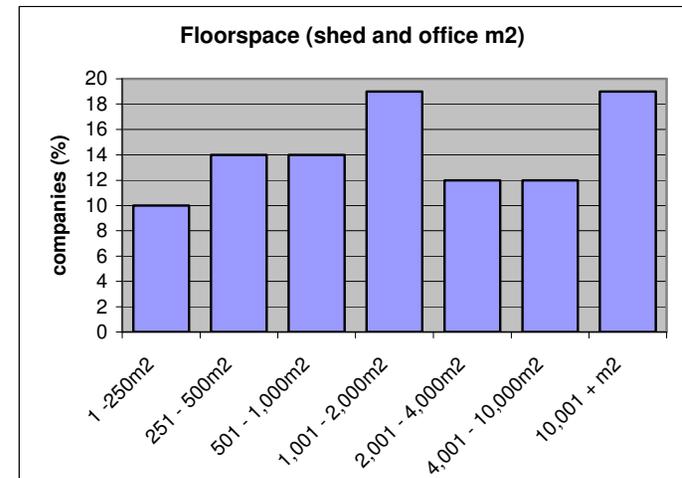
Leasehold is the most common form of tenure, 72% of properties are in this category, followed by freehold properties (39%).

Table 3-4: Tenure

Tenure	%
Leasehold	72
Freehold	39
License	6
Sub-lease	4

Source: Enfield Business Survey, 2006

Figure 3-1 Floorspace (m2)

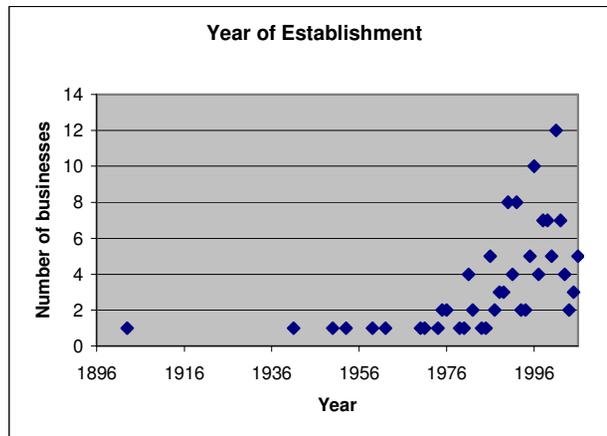


Source: Enfield Business Survey, 2006

Business establishment

Figure 3-2 shows that only four of the businesses surveyed were established in the area before 1956. Indeed, 82% of businesses surveyed were established at their current site in the last twenty years.

Figure 3-2 Year of establishment in the area



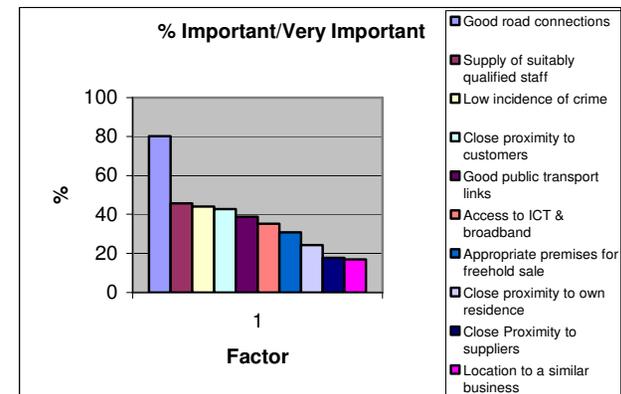
Source: Enfield Business Survey, 2006

3.3 Business location

Location

The factor that most influences businesses in choosing their location is good road connections. 80% of companies cited this factor as important or very important in deciding to locate to their current premises (see **Figure 3-3**). The next most important factors include suitable staff, low incidence of crime and proximity to customers (all above 40% of respondents).

Figure 3-3 Choice of location

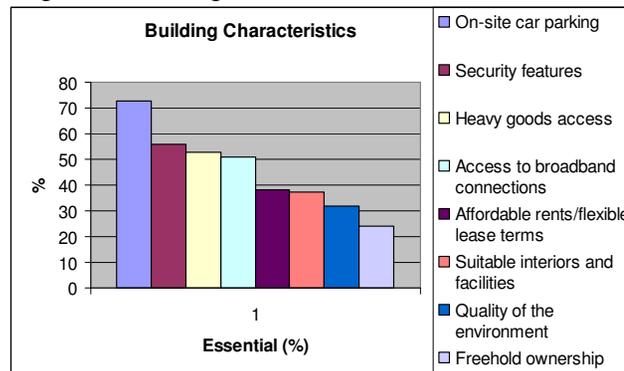


Source: Enfield Business Survey, 2006

Building

Respondents were asked what they felt the most important characteristics were for their business operations. On-site car parking was rated as essential by over 70% of the businesses but security features, heavy goods access, and access to ICT and broadband were also considered as essential by over 50% of businesses.

Figure 3-4 Building characteristics



Source: Enfield Business Survey, 2006

Founding locations

Responses to the question on where companies had relocated to Enfield from further highlighted the local/sub-regional nature of business demand in the Borough. While 37% of businesses remain at their first location, a further 41% have relocated from elsewhere in North London (giving a total of 78% of businesses originating from the North London sub-region). Only 12.5% of companies relocated from elsewhere in London and surrounding areas (Essex / Hertfordshire).

Table 3-5: Previous locations

Location	%
Elsewhere in North London	41.2
East / South East London	5.9
West / South West London	2.9
Central London	2.2
Essex or Hertfordshire	1.5
Elsewhere in the UK	6.6
Outside the UK	0.7
Don't know	2.2
This was its first location	36.8

Source: Enfield Business Survey, 2006

Satisfaction with surroundings

67.6% of companies rated their surrounding area as good or very good. 11.1% of companies were dissatisfied with the area surrounding their business and rated it as poor or very poor. There were few associated disadvantages with the area but those listed included:

- No facilities/amenities
- Poor public transport
- Road congestion
- Dirty/crime/uncared for
- Poor access/roads
- No parking

There is also a relatively high level of satisfaction with business premises: 67.6% of companies rating their premises as good or very good. In addition 52% of respondents are satisfied that Enfield is a good place to do businesses (rated good and very good). 13.3% of

respondents were dissatisfied, scoring poor and very poor.

Table 3-6: Satisfaction with Enfield as a place of business

	%
Very poor	3.7
Poor	9.6
Neither	33.8
Good	39
Very good	12.5
Don't know	1.5

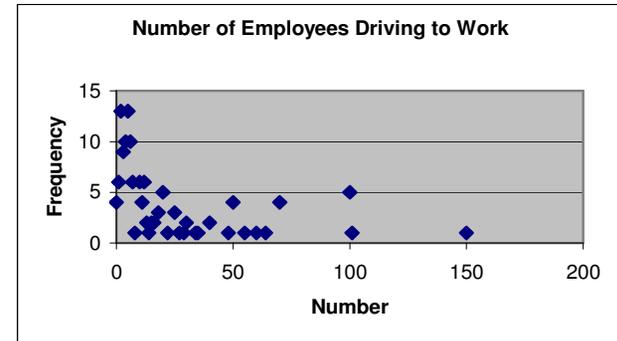
Source: Enfield Business Survey, 2006

Transport

Figure 3-5 shows that 57.4% of companies have between 0-10 employees driving to work each day and reflects the SME characteristics of the business stock. Cross referencing business size with the employees driving to work suggests a high proportion of employees in Enfield drive to work on a daily basis.

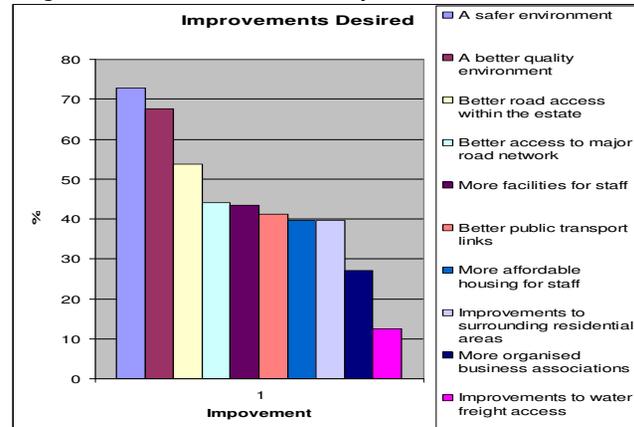
Respondents were asked what they would like to see improved in the area and improving safety in the area was high on the agenda. **Figure 3-6** provides details of other factors listed. Of the prompted improvements 73% recognised a safer environment as important/very important; 68% rated a better environment as important/very important; and 54% saw road access within their estate as important/very important. Water-freight access was the least desired improvement.

Figure 3-5 Employees driving to work



Source: Enfield Business Survey, 2006

Figure 3-6 Desired local area improvements

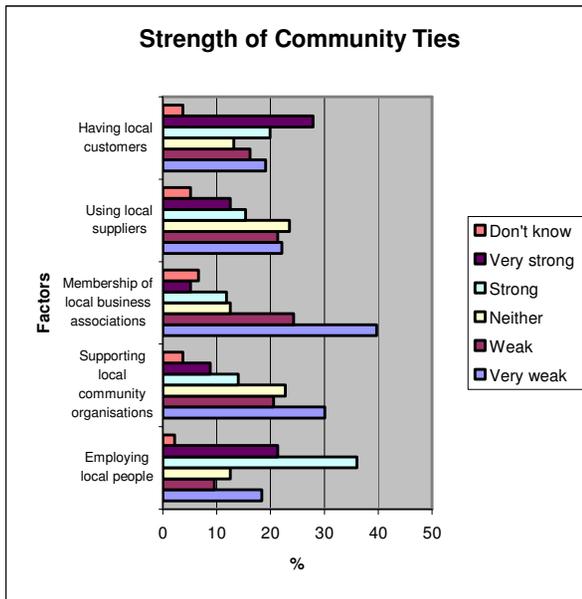


Source: Enfield Business Survey, 2006

Local community ties

Overall ties with the local community appear to be weak. Employing local people (57%) and having local customers (48%) is the biggest link businesses have to the local community. **Figure 3-7** shows in more detail how people rated their ties with the community.

Figure 3-7 Strength of community ties



Source: Enfield Business Survey, 2006

In terms of staff location, 17% of businesses said that none of their employees lived within two miles of business premises, while a further 35% of companies

said that fewer than 10% of employees lived within 2 miles of the businesses premises. By comparison 8.1% of companies said that 100% of employees lived within 2 miles of the business premises.

With regard to the location of clients and suppliers, Table 3-7 provides a breakdown, by area of companies who have suppliers and customers in other areas. It shows that the businesses are predominantly serving a North London or London customer base, with only one-third of businesses dealing with customers internationally. However, businesses supply chains are wider, with the sub-region and elsewhere in the UK the main suppliers to Enfield businesses.

Table 3-7: Location of clients and suppliers (%)

Location	% companies with customers in	% companies with suppliers in
North London	89%	68
East / South East London	71%	40
West / South West London	68%	37
Central London	70%	31
Essex or Hertfordshire	73%	48
Elsewhere in the UK	61%	68
Outside the UK	34%	44

Source: Enfield Business Survey, 2006

3.4 Business plans to move, grow and invest

Over 60% of companies said that they would not move away from the area in the next 3 years. Of the businesses who said that they planned or were thinking about relocation, there reasons for wanting to relocate are listed below:

- Require larger premises to facilitate expansion (14%)
- Price of premises too expensive (6.6%)
- Other (individual reasons 5.9%)
- Require better quality premises (3.7%)
- Lease expiring (2.9%)
- Require better public transport links (2.2%)
- Require better road links (2.2%)
- Need to move nearer to customers (1.5%)
- Need to move nearer to suppliers (0.7%)
- Poor security and incidence of crime (0.7%)

Table 3-8: Likelihood of moving

Likelihood that this establishment will move all or some of its operations away from these current premises in the next three years?	%
Yes, will move all its operations	12.5
Yes, may move all its operations	14.7
Yes, will move some of its operations	0.7
Yes, may move some of its operations	3.7
Will not move	64.7
Don't know/refused	3.7

Source: Enfield Business Survey, 2006

Of those companies wishing to relocate, 80% wished to stay in the general area. Within this a third wished to relocate elsewhere in Enfield, 21% elsewhere in north London, and 26% to Essex/Herts area (see **Table 3-9**).

Table 3-9: Where companies want to relocate

	%
Another location within Enfield	33
Essex / Herts (outside M25)	26
Elsewhere within North London	21
Elsewhere in UK	16
Outside the UK	4

Source: Enfield Business Survey, 2006

With regards to future plans, 43% expect major changes to occur in their operational market within the next 5 to 10 years. Overall, businesses were optimistic about future growth with almost two-thirds of businesses expecting growth to some degree and only 2% planning to reduce capacity.

Table 3-10: Plans for growth

Where do you see your business going in the next 3 years?	%
It will grow gradually	36
It will grow very strongly	29.4
It will stay about the same	19.9
We have no real plan - we'll play it by ear	10.3
Don't know	2.9
We are planning to reduce the size of the business	1.5

Source: Enfield Business Survey, 2006

4 Employment land supply

A key component of this study has been a visual field survey of Enfield employment land clusters. This survey was undertaken in April 2005 (as part of the *NLELS*) to identify key existing employment land characteristics such as the amount of land used for employment uses, distribution of existing employment land uses, typical cluster size and site floorspace distributions, and general site quality and operational issues.

4.1 Gross and net employment land

A total of 25 Enfield employment clusters were mapped during the visual field survey work. All of these sites were identified through consultation with council officers and were digitally mapped to produce a database of employment land data within the borough. A summary of the key information from this database is provided in **Table 4-1** below. Key conclusions regarding the overall quantum of employment land in Enfield are summarised as follows.

- A total of 25 employment land clusters identified and surveyed within Enfield containing 807 individual employment sites
- The **gross employment land** covered by these clusters was 404ha, equating to about 5% of the LBE gross area
- This area however includes a range of both public and private roads and open space along with the employment sites that are the focus of the survey.

Once these have been removed from the data then Enfield is left with approximately 359ha of **net employment land** (around 89% of the total area surveyed).

Table 4-1: Enfield land supply summary

Number of clusters and sites	
Number of clusters	25
Number of sites	807
Employment land areas (ha)	
Gross employment land	404.2
Net employment land (excluding roads and public open space)	359.1
Net employment land in industrial / warehousing use (including unclassified uses)	333.2
Vacant or derelict land	65.0
'Unknown'	14.2
Gross borough area	8,192
Employment land areas (%)	
Gross employment land as percentage of borough	4.9

Source: Halcrow (April 2005)

The locations of all of these Enfield employment clusters are shown on **Figure 1-1** and the **Existing Land Use Map** provided with this report. A breakdown of the above information on a cluster basis is provided in **Table 4-2**.

Table 4-2: Enfield employment land clusters

Cluster identifier and name	Number of sites	Gross employment land (ha)	Net employment land (ha)	Percentage of net employment land (%)
EN001 – Chase Side Works	7	0.9	0.9	0.2
EN003 – Regents Avenue	9	1.8	1.8	0.5
EN004 – Oakthorpe Dairy	1	3.1	3.1	0.9
EN005 – New Southgate Industrial Estate	16	1.8	1.7	0.5
EN006 – Redburn Trading Estate	30	4.2	3.8	1.0
EN007 – Queensway	33	3.6	3.4	1.0
EN008 – Harbert Road Estate	61	19.6	17.1	4.8
EN009 / EN014 / EN026 – Meridian Way Land / Glover Drive / Kimberly Road	7	23.2	23.3	6.5
EN010 – Montagu Industrial Estate / Kenninghall Estate / Railtrack Land	62	16.1	13.8	3.8
EN011 – Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	33	3.6	2.7	0.8
EN012 – Langhedge Lane Industrial Estate	7	0.7	0.7	0.2
EN013 – Commercial Road & N. Middlesex Estate	56	9.8	9.3	2.6
EN015 – Eley's Estate	77	27.3	24.5	6.8
EN016 – Innova Park	11	41.7	35.7	9.9
EN017 – Hertford Road / Mollison Avenue	2	10.9	10.9	3.0
EN018 – Meridian Business Park	17	21.1	18.9	5.3
EN019 – Aztec 406 Development Site	6	19.6	19.3	5.4
EN020 – Brimsdown Industrial Area	243	139.1	115.1	32.1
EN021 – Great Cambridge Industrial Estate	26	11.2	11.0	3.1
EN022 – Great Cambridge Road (Martinbridge)	15	7.0	7.0	2.0
EN023 – Great Cambridge Road	9	7.1	7.1	2.0
EN024 – Great Cambridge Road	59	25.5	23.4	6.5
EN025 – Alma Industrial Estate	20	5.2	4.6	1.3
Total	807	404.2	359.1	100.0

Source: Halcrow (April 2005). Note: Cluster EN002 has been deleted as it has no employment land (i.e. it has already been converted to either housing or offices)

4.2 Land for industrial / warehousing uses

The analysis of employment land in Enfield needs to focus on the level of Net Employment Land that is actually used for *employment generating industrial and distribution activities*. Analysis therefore needs to exclude uses that could not reasonably be considered to fall into these categories. Net employment land minus inappropriate land uses therefore equates to **net employment land in industrial / warehousing use**.

Halcrow has developed a bottom up employment land definition based on the typical range of employment land uses that are found within Greater London employment land¹⁰, developed from the visual land survey and previous employment land studies in Greater London. A wider range of land uses in employment areas are identified from this work than would be generally be expected under the B2 / B8 General Industrial and Storage and Distribution Use Class classification. For example the following activities were found to be typically located within employment areas from North London (including Enfield) to the Lower Lea Valley and London Riverside:

- Motor vehicle sales
- Public transport maintenance facilities and depots
- Taxi and car hire businesses

¹⁰ This typical range is based on the data collected during the *NLELS*, the *Lower Lea Business Survey* (URS, 2004), *Barking and Dagenham and Havering Industrial Land Study* (URS, 2003), and *Leaside Arc Business Survey and Planning Policy Review* (URS, 2003).

- Council depots and vehicle storage areas
- Renting of machinery and equipment
- Construction support activities

All of these uses however are not generally considered to be B2 / B8 uses (though they are often found adjacent to these uses). Rather they are usually considered to be *Sui Generis* (i.e. a use on its own). **As a result a broad employment use definition has been developed by taking into account the general likelihood of the activity to be located within a Greater London employment area**. This is presented in **Table 4-3**¹¹.

Along with the sectoral definition, a range of other activities have also been defined to allow for the practical limitations of the visual survey process. These include 'multiuse', 'under construction', 'vacant or derelict' and 'unknown'.

¹¹ It is noted that the *NLELS* definition of industrial / warehousing uses is broader than used in the RTP Greater London study. This reflects the more detailed understanding of uses in North London.

Table 4-3: Existing Enfield employment land use (NLELS land use definition)

Land use	Number of employment sites	Percentage of sites (%)	Net employment land (ha)	Percentage of net employment land (%)
Food and Tobacco (SIC 15-17)	30	4.2	24.7	7.4
Textile (SIC 18-19)	12	1.7	1.5	0.5
Wood and Paper Products (SIC 20-21)	15	2.1	3.0	0.9
Printing (SIC 22)	27	3.8	3.0	0.9
Chemicals, Plastics and Non-Metallic Products (SIC 23-26)	12	1.7	9.5	2.9
Metals, Machinery and Equipment (SIC 27-36)	49	6.8	18.6	5.6
Refuse and Recycling (SIC 37 and 90)	15	2.1	8.7	2.6
Construction (SIC 45)	19	2.6	5.9	1.8
Motor Vehicle Sale and Repair (SIC 50)	87	12.1	22.6	6.8
Wholesale (SIC 51)	135	18.8	42.2	12.7
Warehousing (SIC 63)	111	15.5	69.2	20.8
Transport (SIC 62)	7	1.0	5.0	1.5
Utilities (SIC 40-41)	8	1.1	17.3	5.2
Renting of Machinery and Equipment (SIC 71.1 to 71.3)	20	2.8	6.6	2.0
Post and Communications (SIC 64)	14	2.0	7.9	2.4
Public Administration (SIC 75)	1	0.1	0.2	-
Multi Use	11	1.5	2.7	0.8
Under Construction	8	1.1	5.5	1.7
Vacant or Derelict	62	8.6	65.0	19.5
Unknown	74	10.3	14.2	4.2
Total	717	100.0	333.2	100.0

Source: Halcrow (April 2005)

During the survey a range of other non-employment land related activities were also identified within the employment cluster boundaries but excluded from the analysis. These activities included:

- Residential

- Retail
- Hotels, restaurants, and bars
- Office based businesses
- Education facilities
- Health and social welfare facilities
- Entertainment, recreational and sporting activities

4.2.1 **Analysis of net employment land in industrial / warehousing use**

Table 4-3 showed that using the *NLELS* employment land use definition, 717 employment sites were identified within Enfield (89% of total identified sites) and these sites cover an area of 333ha (93% of the net employment area). The most significant land use categories by both site numbers and land areas are food and tobacco, wholesale, and warehousing which combined account for 39% of employment sites (276 sites) and 41% of employment site land area (136ha).

In comparison the bottom three land use categories by site area are textile, wood and paper products, and printing. Combined these categories account for just 8ha of employment site land area (2%) and 54 employment sites (8%).

Also from **Table 4-3** a range of other relevant information can also be derived.

- A small number of sites (11 sites covering an area of 3ha) were identified as being multi use. These typically consist of older multi-storey buildings with different uses on separate floors.
- A surprisingly small amount of construction activity was identified, although this may have been affected by the timing of the survey work. A total of 8 sites were found to be under construction covering an area of 6ha¹².

¹² The market review suggests that since the survey the level of construction has increased in Enfield.

- Around 21% of the employment site area (65ha employment area) was vacant / derelict. This is significantly higher than the 7.4% that was identified during December 2003¹³.
- In fact the proportion of vacant or derelict land is likely to be actually higher than this as some of the sites identified as unknown (74 employment sites and 14ha of employment land) are also likely to be vacant or derelict; however it was not possible to confirm this on the day of the survey.

4.3 **Area and floorspace analysis**

The area and floorspace analysis focuses on the distribution of net cluster and site areas across Enfield, along with the site floorspace distribution.

4.3.1 **Net cluster area distribution**

A key factor in the renewal and development viability of existing gross employment land clusters will be the cluster size. As a result an analysis of the collected survey data has been undertaken to review this issue. The results of this assessment are presented in **Table 4-4** and summarised below.

- Just over two thirds of the Enfield employment land is located within 7 very large employment clusters (28% of the identified clusters) each of which is 15ha or larger. The Brimsdown Industrial Area is the largest of these and at 115ha accounts

¹³ *Industrial and Warehousing Land Demand in London* (RTP et al, 2004)

of almost a third of the Enfield employment land area.

- At the other extreme one in five employment clusters are small, with net land areas of less than 2ha. In terms of the total land in Enfield, these clusters only account for 1.7% of land.
- The majority of Enfield clusters are however of intermediate size (ranging from 2 to 15ha) and these account for 28% of the Enfield employment land (99ha)

4.3.2 **Net site area distribution**

The net area of employment sites within each cluster is also important in understanding the Enfield employment land demand.

Table 4-5 provides information on the distribution of site sizes across Enfield. Key results that should be taken from this table include:

- A good spectrum of employment land sites are found within Enfield from very small (less than 250m²) through to the very large (172,000m² plus)
- Just under half (44%) of the Enfield sites identified are small to medium with areas up to 1,000m².
- The intermediate sized sites (with net site areas of 1,001 to 5,000m²) account for 38% of sites and around 20% of the net Enfield employment site area. This equates to just over 0.7million m² (71ha).
- Finally the top 18% of sites (each with net site areas of over 5,000 m²) account for just over 272ha of employment land. This equates to

around 76% of the net area covered by all Enfield employment sites.

- Around 9% of the identified employment sites have no building currently located on them. Again this is likely to include a fair number of vacant or derelict sites.

Table 4-4 Enfield cluster area distributions

Net cluster employment land (ha)	Number of employment clusters	Percentage of clusters (%)	Net employment land (ha)	Percentage net employment land (%)
0.0-1.0	2	8.0	1.6	0.4
1.1-2.0	3	12.0	4.6	1.3
2.1-5.0	5	20.0	17.6	4.9
5.1-15.0	8	32.0	81.2	22.6
15.1+	7	28.0	254.1	70.8
Total	25	100.0	359.1	100.0

Source: Halcrow (April 2005)

Table 4-5 Enfield net site area distributions

Net employment area (m ²)	Number of employment sites	Percentage of sites (%)	Net employment area (m ²)	Percentage employment area (%)
1-250	83	10.3	13,006	0.4
251-500	130	16.1	47,687	1.3
501-1,000	139	17.2	102,348	2.8
1,001-1,500	95	11.8	118,964	3.3
1,501-3,000	140	17.3	302,688	8.4
3,001-5,000	75	9.3	290,557	8.1
5,001-10,000	65	8.1	474,984	13.2
10,001-20,000	47	5.8	660,981	18.4
20,000+	33	4.1	1,582,516	44.0
Total	807	100.0	3,593,731	100.0

Source: Halcrow (April 2005)

4.4 Site quality and other issues

A range of information on general site quality and other relevant issues was also undertaken during the Enfield employment land survey work. The key information

collected is presented in Table 4-6. While the building stock within Enfield is generally identified as either 'Good' or 'Reasonable' almost a tenth of buildings have been identified as 'Poor' or 'Very Poor'.

Table 4-6 Enfield building age and quality

Condition of buildings	Age of buildings					Total	Percentage (%)
	1900 to 1944	1945 to 1964	1965 to 1984	1985 to 2005	Unknown		
Good	-	-	50	282	20	352	43.6
Reasonable	-	23	167	102	16	308	38.2
Poor	-	25	31	5	6	67	8.3
Very Poor	-	1	-	-	1	2	0.3
Unknown	-	-	5	5	68	98	9.6
Total	-	49	253	394	111	807	
Percentage (%)	-	6.1	31.4	48.8	13.7		100.0

Source: Halcrow (April 2005)

4.5 Area Action Plan land supply analysis

This section provides the key cluster employment land supply information for the North East Enfield and Central Leaside AAP areas¹⁴.

Table 4-7 provides an overview of the Enfield employment land supply in each of the AAP areas alongside the borough totals. From this table it can be seen that the majority of the Enfield employment land

clusters are contained within the North East Enfield and Central Leaside AAP areas. Between them the areas account for 74% of borough sites and 83% of gross employment land. As the larger area, North East Enfield AAP accounts for 56% of Enfield's gross employment land alone. A further key feature of the areas is that they account for almost all of the borough's vacant employment land. North East Enfield incorporates 30.2ha of vacant land and Central Leaside 31.8ha.

¹⁴ No information has been prepared for the North Circular AAP as it contains only two small employment clusters and hence do not provide enough information of the creation of separate employment land tables.

Table 4-7: Enfield AAP land supply summary

Number of clusters and sites	North East Enfield AAP Clusters	Central Leaside AAP Clusters	Other Enfield Clusters	All Enfield Clusters
Number of clusters	7	6	12	25
Number of sites	356	246	205	807
Employment land areas (ha)				
Gross employment land	225.8	109.4	69.0	404.2
Net employment land (excluding roads and public open space)	192.5	100.7	65.9	359.1
Net employment land in industrial / warehousing use (including unclassified uses)	177.3	94.7	61.2	333.2
Vacant or derelict land	30.2	31.8	3.0	65.0
'Unknown'	6.0	3.7	4.5	14.2

Source: Halcrow (April 2005)

The following tables (**Table 4-8** and **Table 4-9**) provide a breakdown of the employment land in each area by cluster.

Within the North East Enfield AAP area, employment land is dominated by the Brimsdown Industrial Area. This cluster alone accounts for 68% of sites in North East Enfield, and 60% of net employment land. Outside of this area only three other clusters are larger than 10ha (net).

In Central Leaside the employment land offer is more diverse and spread across a number of similar sized clusters. The largest area is Eley's Estate with 25ha (net), but five of the six clusters have gross land areas of 14ha or more.

4.5.1 AAP land for industrial / warehousing uses

The breakdown of land uses in each area is shown in **Table 4-10** and **Table 4-11**. They highlight the distinctly different land use character in each area. In North East Enfield the dominant land uses are warehousing (25.2%) and wholesale (17.7%), with a strong representation of food and tobacco manufacturers (9.5). In Central Leaside, while warehousing is the largest sector, at 10.2% it is not as dominant. Other key sectors are refuse and recycling (8.2%) and motor vehicle sector (7.1%). Also worth noting is the fact that the vacancy level in Central Leaside is much higher than in North East Enfield (33.6% and 17% respectively).

Table 4-8: North East Enfield AAP employment land clusters

Cluster identifier and name	Number of sites	Gross employment land (ha)	Net employment land (ha)	Percentage of net employment land (%)
EN006 – Redburn Trading Estate	30	4.2	3.8	2.0
EN007 – Queensway	33	3.6	3.4	1.8
EN016 – Innova Park	11	41.7	35.7	18.6
EN017 – Hertford Road / Mollison Avenue	2	10.9	10.9	5.7
EN018 – Meridian Business Park	17	21.1	18.9	9.8
EN020 – Brimsdown Industrial Area	243	139.1	115.1	59.8
EN025 – Alma Industrial Estate	20	5.2	4.6	2.4
Total	356	225.8	192.5	100.0

Source: Halcrow (April 2005)

Table 4-9: Central Leaside AAP employment land clusters

Cluster identifier and name	Number of sites	Gross employment land (ha)	Net employment land (ha)	Percentage of net employment land (%)
EN008 – Harbert Road Estate	61	19.6	17.1	17.0
EN009 / EN014 / EN026 – Meridian Way Land / Glover Drive / Kimberly Road	7	23.2	23.2	23.0
EN010 – Montagu Industrial Estate / Kenninghall Estate / Railtrack Land	62	16.1	13.8	13.7
EN011 – Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	33	3.6	2.7	2.7
EN015 – Eley's Estate	77	27.3	24.5	24.4
EN019 – Aztec 406 Development Site	6	19.6	19.3	19.2
Total	246	109.4	100.7	100.0

Source: Halcrow (April 2005)

Table 4-10: Existing North East Enfield AAP employment land use (NLELS land use definition)

Land use	Number of employment sites	Percentage of sites (%)	Net employment land (ha)	Percentage of net employment land (%)
Food and Tobacco (SIC 15-17)	14	4.5	16.8	9.5
Textile (SIC 18-19)	3	1.0	0.2	0.1
Wood and Paper Products (SIC 20-21)	7	2.2	1.9	1.1
Printing (SIC 22)	18	5.8	2.5	1.4
Chemicals, Plastics and Non-Metallic Products (SIC 23-26)	7	2.2	6.5	3.7
Metals, Machinery and Equipment (SIC 27-36)	18	5.8	8.1	4.5
Refuse and Recycling (SIC 37 and 90)	7	2.2	0.9	0.5
Construction (SIC 45)	10	3.2	4.0	2.3
Motor Vehicle Sale and Repair (SIC 50)	17	5.4	5.8	3.3
Wholesale (SIC 51)	76	24.4	31.5	17.7
Warehousing (SIC 63)	49	15.7	44.6	25.2
Transport (SIC 62)	2	0.6	1.6	0.9
Utilities (SIC 40-41)	5	1.6	9.8	5.5
Renting of Machinery and Equipment (SIC 71.1 to 71.3)	11	3.5	3.4	1.9
Post and Communications (SIC 64)	5	1.6	1.8	1.0
Public Administration (SIC 75)	1	0.3	0.2	0.1
Multi Use	6	1.9	1.7	0.9
Under Construction	1	0.3	0.1	0.1
Vacant or Derelict	28	9.0	30.2	17.0
Unknown	27	8.7	6.0	3.4
Total	312	100.0	177.3	100.0

Source: Halcrow (April 2005)

Table 4-11: Existing Central Leaside AAP employment land use (NLELS land use definition)

Land use	Number of employment sites	Percentage of sites (%)	Net employment land (ha)	Percentage of net employment land (%)
Food and Tobacco (SIC 15-17)	7	3.2	2.8	3.0
Textile (SIC 18-19)	4	1.8	0.5	0.6
Wood and Paper Products (SIC 20-21)	5	2.3	0.7	0.8
Printing (SIC 22)	7	3.2	0.3	0.3
Chemicals, Plastics and Non-Metallic Products (SIC 23-26)	4	1.8	2.9	3.1
Metals, Machinery and Equipment (SIC 27-36)	16	7.3	3.2	3.4
Refuse and Recycling (SIC 37 and 90)	8	3.7	7.8	8.2
Construction (SIC 45)	4	1.8	0.7	0.8
Motor Vehicle Sale and Repair (SIC 50)	36	16.5	6.8	7.1
Wholesale (SIC 51)	33	15.1	5.2	5.5
Warehousing (SIC 63)	26	11.9	9.6	10.2
Transport (SIC 62)	3	1.4	2.7	2.9
Utilities (SIC 40-41)	2	0.9	7.4	7.9
Renting of Machinery and Equipment (SIC 71.1 to 71.3)	6	2.8	2.2	2.4
Post and Communications (SIC 64)	3	1.4	1.7	1.8
Public Administration (SIC 75)	-	-	-	-
Multi Use	3	1.4	0.6	0.7
Under Construction	3	1.4	3.9	4.1
Vacant or Derelict	23	10.6	31.8	33.6
Unknown	25	11.5	3.7	3.9
Total	218	100.0	94.7	100.0

Source: Halcrow (April 2005)

4.5.2 AAP net cluster and site area distributions

The analysis of net cluster and site area distributions is presenting in **Table 4-12** through to **Table 4-15**. The analysis indicates that given the two areas have very different land-use characteristics, this has translated through in to a different offer in terms of the cluster size and range of net site sizes. For example, North East

Enfield has a greater percentage of land accommodated on large clusters (88% of net employment land is accounted for by the three biggest clusters), and has a significantly higher proportion of land associated with sites over 20,000 m².

Table 4-12: North East Enfield AAP cluster area distributions

Net cluster employment land (ha)	Number of employment clusters	Percentage of clusters (%)	Net employment land (ha)	Percentage net employment land (%)
0.0-1.0	-	-	-	-
1.1-2.0	-	-	-	-
2.1-5.0	3	42.8	11.8	6.1
5.1-15.0	1	14.4	10.9	5.7
15.1+	3	42.8	169.7	88.2
Total	7	100.0	192.5	100.0

Source: Halcrow (April 2005)

Table 4-13: Central Leaside AAP cluster area distributions

Net cluster employment land (ha)	Number of employment clusters	Percentage of clusters (%)	Net employment land (ha)	Percentage net employment land (%)
0.0-1.0	-	-	-	-
1.1-2.0	1	12.5	1.1	1.1
2.1-5.0	1	12.5	2.7	2.7
5.1-15.0	3	37.5	35.9	35.7
15.1+	3	37.5	60.9	60.5
Total	8	100.0	100.7	100.0

Source: Halcrow (April 2005)

Table 4-14: North East Enfield AAP net site area distributions

Net employment area (m ²)	Number of employment sites	Percentage of sites (%)	Net employment area (m ²)	Percentage employment area (%)
1-250	45	12.7	7,283	0.4
251-500	50	14.0	18,693	1.0
501-1,000	64	18.0	47,942	2.5
1,001-1,500	38	10.7	48,155	2.5
1,501-3,000	56	15.7	121,164	6.3
3,001-5,000	31	8.7	120,875	6.3
5,001-10,000	30	8.4	217,646	11.3
10,001-20,000	22	6.2	295,850	15.4
20,000+	20	5.6	1,047,107	54.3
Total	356	100.0	1,924,716	100.0

Source: Halcrow (April 2005)

Table 4-15: Central Leaside AAP net site area distributions

Net employment area (m ²)	Number of employment sites	Percentage of sites (%)	Net employment area (m ²)	Percentage employment area (%)
1-250	27	11.0	3,974	0.4
251-500	41	16.7	14,274	1.4
501-1,000	37	15.0	26,839	2.7
1,001-1,500	36	14.6	44,193	4.4
1,501-3,000	42	17.1	91,799	9.1
3,001-5,000	15	6.1	56,469	5.6
5,001-10,000	24	9.8	175,253	17.4
10,001-20,000	16	6.5	243,315	23.3
20,000+	8	3.3	359,757	35.7
Total	246	100.0	1,006,873	100.0

Source: Halcrow (April 2005)

4.5.3 AAP – building age and quality

With regards to the age and quality of the building stock in each area, the following tables indicate that the stock in North East Enfield is both of a better quality and newer than the stock in Central Leaside. Around 50%

of the former's stock was classed as 'good' quality and identified as built since 1985. The tables clearly indicate a correlation between the quality and age of building stock (for example the 19.5% of poor stock in Central Leaside is primarily built between 1945 and 1984).

Table 4-16: North East Enfield AAP building age and quality

Condition of buildings	Age of buildings					Total	Percentage (%)
	1900 to 1944	1945 to 1964	1965 to 1984	1985 to 2005	Unknown		
Good	-	-	31	139	10	180	50.6
Reasonable	-	15	70	31	6	122	34.3
Poor	-	3	8	4	3	18	5.0
Very Poor	-	1	-	-	-	1	0.3
Unknown	-	-	1	3	31	35	9.8
Total	-	19	110	177	50	356	
Percentage (%)	-	5.3	30.9	49.7	14.1		100.0

Source: Halcrow (April 2005)

Table 4-17: Central Leaside AAP building age and quality

Condition of buildings	Age of buildings					Total	Percentage (%)
	1900 to 1944	1945 to 1964	1965 to 1984	1985 to 2005	Unknown		
Good	-	-	1	48	2	51	20.7
Reasonable	-	6	73	32	8	119	48.4
Poor	-	22	22	1	3	48	19.5
Very Poor	-	-	-	-	1	1	0.4
Unknown	-	-	-	1	26	27	11.0
Total	-	28	96	82	40	246	
Percentage (%)	-	11.4	39.0	33.3	16.3		100.0

Source: Halcrow (April 2005)

5 Employment land demand

5.1 Approach

This section reviews the current and forecast demand for employment land in Enfield. The approach to the demand analysis centres on the forecasts developed for the *NLELS* study, but with a reappraisal of the demand factors that translate employment into land demand (namely the employment density and plot ratio assumptions used).

The rationale for this reappraisal comes from the movement away from a sub-regional analysis to a local area review. In producing a sub-regional analysis the demand parameters were developed to be representative of the four boroughs in North London, and therefore were 'generic' by nature. In examining the specifics of employment land in Enfield we have considered how the borough is differentiated in employment/industry terms from the rest of North London and the impact of this on the demand assumptions.

The process for assessing employment land demand is as follows. The level of employment land demand in the study area is generated by forecasting the level of workplace employment from which a resultant demand for sites and premises can be calculated. In order to 'convert' these net employment change forecasts by sector to estimates of employment land and floorspace demand, we have used an employment density conversion matrix. To convert employment floorspace

to the employment land requirements plot ratios assumptions have been made. Each of the key assumptions in the method (employment forecasting, employment densities, plot ratios) is discussed below.

5.2 Employment forecasts¹⁵

The forecasts adopted for the Enfield Employment Land study are consistent with those developed for the *NLELS*. The forecasts are locally based forecasts developed specifically for the study.

Table 5-1 presents the Greater London and North London employment forecasts produced for the *NLELS* study and show a 17% increase in employment for North London in the period 2001-16. *Comparison between these forecasts and those produced by the GLA for the London Plan shows that the NLELS forecast to be more optimistic at both the regional and sub-regional level; for example predicting an increase in the total number of jobs of 19% compared to a GLA increase of 11% at the Greater London level. However, the change in the manufacturing sector¹⁶ is very similar between the forecasts with NLELS forecasting a 32% fall in employment compared to a 33% fall in the GLA*

¹⁵ Details on the forecasting methodology can be found in the North London Employment Land Study (2006)

¹⁶ 'Manufacturing' is taken as the sum of the following sectors: Chemical manufacture, Hi-Tech metal man/engineering, Non-metallic, non-chemical man. and Trad metal man/engineering.

forecasts. At the North London level the NLELS forecast becomes more optimistic. There are two key factors for this: (i) the NLELS forecasts have been adjusted to reflect bottom-up analysis of the sub-

regional economy, and (ii) the GLA forecasts have weighted the locational distribution of growth across London.

Table 5-1: Employment forecasts (2001-2016) as 22 sector SIC

Sector	Greater London			North London		
	2001	2016	% Change	2001	2016	% Change
Agriculture/Extraction	8,200	5,000	-39%	533	392	-26%
Chemical manufacture	29,100	16,800	-42%	3,097	2,570	-17%
Hi-Tech metal man/engineering	16,800	7,600	-55%	1,263	614	-51%
Non-metallic, non-chemical man.	181,400	140,900	-22%	15,528	9,488	-39%
Trad metal man/engineering	56,200	28,600	-49%	8,604	3,025	-65%
Electricity, gas, water, waste	21,900	19,800	-10%	1,816	1,691	-7%
Construction	216,500	246,900	14%	28,083	24,668	-12%
Motor vehicle sale, repair	63,700	56,100	-12%	7,652	7,168	-6%
Wholesale	182,700	153,100	-16%	21,294	17,701	-17%
Food retail	126,800	149,500	18%	16,752	20,235	21%
Other retail	283,400	311,500	10%	29,570	37,524	27%
Hotels and restaurants	296,900	443,100	49%	20,151	28,360	41%
Transport, storage, communications	363,900	375,000	3%	25,530	30,038	18%
Financial intermediation	335,100	365,100	9%	9,651	8,830	-9%
Property, renting	125,600	163,400	30%	10,372	16,462	59%
Computing, R&D	144,300	161,500	12%	8,783	7,644	-13%
Professional business services	470,700	668,700	42%	19,972	28,843	44%
Other business services	414,300	434,900	5%	25,591	26,346	3%
Public admin, defence	208,000	243,900	17%	17,305	21,540	24%
Education	271,000	462,500	71%	32,080	58,446	82%
Health, care	348,900	501,000	44%	39,400	50,986	29%
Personal services	365,200	451,100	24%	22,412	24,588	10%
Total	4,530,600	5,405,900	19%	365,439	427,159	17%

Source: North London Employment Land Study (Halcrow 2006) Notes: 1. Figures rounded to the nearest 100. 2. Percentages may not add due to rounding

5.2.1 **Enfield industrial and warehousing employment forecasts**

From the North London forecasts **Table 5-2** has been derived to assess the employment demand within the industrial/warehousing sectors in Enfield. The forecast indicates employment across the *NLELS* defined sectors in Enfield between 2001 and 2016 is quite static (down 0.3%). Key sectors of current demand are

Construction (29%), Transport (18%) and Wholesale (15%). While the first two sectors are forecast to increase by 2016, the latter is forecast to experience a marginal decline. An important growth sector for the period will also be warehousing where a growth of 135% in the employment base will increase the numbers in this sector to over 2,600.

Table 5-2: Enfield industrial and warehousing employment forecasts, 2001-2016

Sector	Enfield Industrial and Warehousing Employment		
	2001	2016	% Change
Food and Tobacco (SIC 15-17)	1,681	1,469	-12.6
Textile (SIC 18-19)	683	140	-79.5
Wood and Paper Products (SIC 20-21)	302	169	-44.0
Printing (SIC 22)	828	484	-41.5
Chemicals, Plastics and Non-Metallic Products (SIC 23-26)	1,247	907	-27.3
Metals, Machinery and Equipment (SIC 27-36)	6,203	2,326	-62.5
Refuse and Recycling (SIC 37 and 90)	328	119	-63.7
Construction (SIC 45)	9,156	11,307	23.5
Motor Vehicle Sale and Repair (SIC 50)	2,408	2,112	-12.3
Wholesale (SIC 51)	6,132	6,027	-1.7
Warehousing (SIC 63)	1,128	2,647	134.7
Transport (SIC 60-62)	4,916	7,152	45.5
Utilities (SIC 40-41)	374	268	-28.3
Renting of Machinery and Equipment (SIC 71)	1,022	1,923	88.2
Post and Communications (SIC 64)	2,740	1,980	-27.7
Total	39,148	39,030	-0.3

Source: North London Employment Land Study (Halcrow 2006)

5.3 Assessing employment land demand

The employment forecasts are converted to land demand by making assumptions on employment densities (to convert to employment floorspace) and plot ratios (to convert to employment land). These assumptions are set out below.

5.3.1 Employment densities

Within the scope of this study, we have sought to provide additional information and refinement of the employment densities used in the *NLELS* report, to better reflect Enfield's specific employment context.

By its very nature the *NLELS* was required to use generic employment densities across the four North London boroughs that represented the nature of activity in the sub-region. Broadly, the employment densities were based upon a review of published sources and studies related to employment densities in London and the South East, as shown in **Table 5-3** below. The '*Industrial and Warehousing Land Demand in London*' study (ODPM, 2004) notes that there is a significant lack of 'up-to date research on employment density ratios and on the quality of jobs it provides' and uses estimates of 30m² per worker for industrial workspace and 40m² per worker for warehousing floorspace. Based on this evidence the agreed *NLELS* employment densities were: B1 & B2: 25-30 m² per worker; B8: 40-50 m² per worker

For this study we have revised these densities in light of further examination of the nature of employment and

land in Enfield compared to the other North London boroughs. The following evidence is presented.

- A broad comparison of employment densities for industrial and warehousing land is derived using the Office of the Deputy Prime Ministers (ODPM) data on floorspace and rateable value for commercial and industrial properties in 2003. **Table 5-4** presents these results and shows that along with Waltham Forest, Enfield has the highest broad employment densities in the sub-region at 45 m² per worker. This, coupled with the fact that Enfield contains 43% of employment floorspace in the sub-region would start to indicate that Enfield employment is significantly different from the average.
- Further examination of the land supply database for North London identifies that the average Enfield industrial and warehousing company occupies more floorspace than companies located in the other three North London boroughs. **Table 5-5** shows that Enfield has noticeably larger business units across all three employment use classes, indicating that the normal employment densities used for *NLELS* do not adequately capture the local situation. Bigger business units (especially in the industrial and warehousing sectors) suggest lower employment densities.

Table 5-3: Published employment densities, for London and the South East

Sectors	Floor Space per Worker (m ²) RTP, 1997	Floor Space per Worker (m ²) DTZ Pieda, 2004
Offices	17.9	18.3
Industrial	31.8	38.2
Manufacturing	29.7	-
Warehousing (general)	40.1	-
Warehousing (with loading bays, e.g. DIY)	-	78.2

Source: North London Employment Land Study (Halcrow 2006)

Table 5-4: Broad estimate of employment densities, North London

Sectors	Barnet	Enfield	Haringey	Waltham Forest	North London
Estimate of existing workplace jobs - ABI (Manufacturing, Construction, Wholesale & Transport - workplace jobs) [A]	24,759	33,086	20,978	16,653	95,476
Area of occupied industrial land - ODPM rateable floorspace (m ² - Manufacturing and Warehouse) [B]	403,000	1,500,700	867,400	748,000	3,519,000
Broad Employment Density (gross floorspace / worker m ²) - NLELS survey [B/A]	16	45	41	45	37

Source: North London Employment Land Study (Halcrow 2006)

Table 5-5: Average floorspace per B1/B2/B8 use for North London boroughs (m²)

Use Class	Barnet	Enfield	Haringey	Waltham Forest
Business (B1)	779	1,749	1,019	933
General Industrial (B2)	1,032	5,458	1,216	1,811
Storage & Distribution (B8)	1,516	3,954	1,905	1,411

Source: Halcrow 2006

Based on the above analysis we believe it is justified to revise the *NLELS* employment densities to better reflect character of Enfield employment land. The local area analysis suggests that slightly lower employment densities are more appropriate than those used in the *NLELS*, as shown in **Table 5-6**. On this basis the overall employment density for the borough ranges from a low of 45 m² per worker to a high of 38 m² per worker. This is consistent with the broad employment density for Enfield presented in **Table 5-4**.

Over the period 2001-2016 this average increases to reflect the shift in employment demand towards B8 uses. *It should be noted that employment densities for new industrial development will tend to be higher than existing employment densities as new industrial development tends to have a greater utilization of space.*

Table 5-6: EELS employment densities

Broad Employment Land Use Category	Employment Density (Gross Floorspace per Worker m2)
Food and Tobacco (SIC 15-17)	30-35
Textile (SIC 18-19)	30-35
Wood and Paper Products (SIC 20-21)	30-35
Printing (SIC 22)	30-35
Chemicals, Plastics and Non-Metallic Products (SIC 23-26)	30-35
Metals, Machinery and Equipment (SIC 27-36)	30-35
Refuse and Recycling (SIC 37 and 90)	30-35
Construction (SIC 45)	30-35
Motor Vehicle Sale and Repair (SIC 50)	30-35
Wholesale (SIC 51)	50-60
Warehousing (SIC 63)	50-60
Transport (SIC 60-62)	50-60
Utilities (SIC 40-41)	50-60
Renting of Machinery and Equipment (SIC 71)	50-60
Post and Communications (SIC 64)	50-60

Source: Halcrow

5.3.2 Plot ratios

Plot ratios are the total gross floor area of a building (including walls and corridors, etc.) divided by the gross area of industrial sites (total area of industrial sites up to site boundaries and includes local roads and parking spaces, etc.) for sites with buildings on them. Plot ratios are used to calculate the employment land demanded after employment densities have been used to calculate the amount of floorspace required in the forecast.

The *NLELS* analysis utilised the plot ratio of 45% from the RTP *Industrial & Warehousing Land Demand in London* study, which was derived from 'consultations with agents and our own experience'¹⁷.

For the EELS study, based on our experience elsewhere in London, we have adopted a plot ratio of 45% for B1/B2 uses and a plot ratio of 50% for B8 uses.

5.4 Estimated employment land demand

Based on the assumptions outlined above, **Table 5-7** presents the Enfield employment land demand and change over the period 2001 to 2016. Given the ranges of the demand parameters discussed above, the table shows two sensitivities associated with a high and low employment density calculation. **The mid-range of these calculations is considered the core demand estimate for Net Employment Land in Enfield.**

The *NLELS* employment base forecast estimates that over the period 2001-2016 the demand for employment land will increase in Enfield by 13ha.

The main factor behind this increase is the growth is the fact that despite employment growth overall being static in the period, there is a structural shift from industrial/manufacturing employment towards warehousing uses. With lower employment densities the net result is an increase in net employment land requirements. **Over the period 2005-2016 the forecast is for an increase in employment land demand of 28ha.** The reason for the increase from the period 2001-2016 is because between 2005 and 2016 there is a slower rate of loss of industrial/manufacturing employment to offset the growth in warehousing sectors (i.e. the main structural decline in industrial/manufacturing occurs in the period 2001-2005).

*This forecast contrasts sharply with the GLA based employment land assessment that anticipates a fall in employment land demand of 56ha in the period 2001-2016 and a fall of 29ha in the period 2005-2016. The reasons for this are attributable to the employment forecast base explained above in **Section 5.2** above. Three sectors account for the variation: Construction; Warehousing; and Transport. For example, the decline in GLA construction land (19ha) contrasts with the *NLELS* construction land growth of 14ha.*

¹⁷ RTP: Industrial & Warehousing Land Demand in London, August 2004 (page 100)

Table 5-7: Net employment land demand (2001-2016)

	Core Enfield Scenario (ha)						
	2001	2005	2006	2011	2016	Land Demand Forecast 2001 to 2016	Land Demand Forecast 2005 to 2016
Core Plot Ratio – High Employment Densities	315	301	304	318	327	11	26
Core Plot Ratio – Low Employment Densities	373	357	361	377	388	15	31
Mid-range	344	329	332	348	357	13	28

Source: Halcrow Note: Figures may not add due to rounding

5.5 Sensitivity testing

Sensitivity testing of the *NLELS* forecasts has been undertaken to help establish potential demand parameters. This testing has included looking at the Plot Ratio assumption and alternative employment demand scenarios.

- In terms of Plot Ratios, sensitivity testing has been undertaken using high and low plot ratio assumptions of 50% and 40% respectively for B1/B2 uses, and 55% and 45% respectively for B8.
- With regards to alternative employment demand scenarios, we have tested the same scenarios featured in the *NLELS* report: namely Policy-Led, Market-Led, and Olympics scenarios¹⁸. The

resulting employment forecasts for each scenario are shown in **Table 5-8**.

The results of these sensitivities are shown in **Table 5-9**. Sensitivities based on Plot Ratios show that over the 2001-2016 period the increase in employment land demand is relatively static, ranging from 12ha to 14ha and indicates a limited level of sensitivity.

All the employment scenarios demonstrate a significant increase in employment over the plan period in Enfield, and a doubling in the growth of industrial/warehousing related employment. Translating this through in to the demand for employment land indicates a significant potential increase in employment land demand in Enfield, reflecting the borough's role within the sub-region. For example, Enfield is the only borough in North London that would see employment growth under each of the forecast scenarios, indicating a potential increase in land demand from 13ha to between 36ha and 40ha.

¹⁸ Further information on the assumptions behind these scenarios can be found in the North London Employment Land Study (Halcrow, 2006)

Table 5-8 Employment change by scenario, Enfield (2001-2016 and 2005-2016)

	Core Enfield		Policy Led (ha)		Market Led (ha)		Olympic (ha)	
	All Sectors	NLELS Land Definition	All Sectors	NLELS Land Definition	All Sectors	NLELS Land Definition	All Sectors	NLELS Land Definition
Employment Change 2001 – 2016	25,095	-118	27,428	2,293	29,197	2,785	27,562	2,427
Employment Change 2005 – 2016	20,686	2,153	22,978	4,526	24,599	4,979	23,098	4,646

Source: North London Employment Land Study (Halcrow 2006)

Table 5-9 Net employment land demand by scenario (2001-2016)

	Core Enfield (ha)		Policy Led (ha)		Market Led (ha)		Olympic (ha)	
	2016	Change 2001-2016	2016	Change 2001-2016	2016	Change 2001-2016	2016	Change 2001-2016
Core Plot Ratio – High Emp Densities	327	11	348	32	351	36	348	33
Core Plot Ratio – Low Emp Densities	388	15	413	40	417	44	413	40
Mid-Range	357	13	380	36	384	40	381	36

Source: Halcrow (Note: Figures may not add due to rounding)

5.6 Conclusions

The demand assessment for industrial and warehousing land in Enfield provides the following conclusions.

- In the period 2001-2016 the demand for Net Employment Land in the borough is estimated to increase by 13ha.
- The main reason for the increase in employment and demand is due to the continued structural change in employment, moving away from traditional manufacturing and industrial uses (B1/B2) towards warehousing/distribution type uses (B8), which are associated with lower employment densities. Therefore, while forecast employment is relatively static, the new employment uses employ lower densities and hence require more land.
- In the period 2005-2016, this change in demand is increased to 28ha owing to the fact that the main decline in manufacturing employment takes place between 2001 and 2005, thus providing less counter balance to the growth in warehousing related employment.
- Demand sensitivity to plot ratio assumptions is considered limited with the testing providing a range of land demand change for the period 2001 to 2016 of between -12ha and 14ha.
- However, demand is highly sensitive to the employment forecasting demand used, as demonstrated by the variation between the NLELS and GLA demand estimates. This is further illustrated by the fact that the three land demand

scenarios – Policy-led, Market-led and Olympic – indicate that the impact on land demand would be significant in Enfield. The assumptions behind the scenarios build upon the fact that Enfield is the main employment concentration in the sub-region and therefore would benefit most from positive changes in the market or policy context, and would benefit the most from potential business relocation from the Olympics site.

6 Key findings: supply and demand

6.1 Key outcomes

- Gross employment land designated in Enfield totals 404.2ha. Of this 333ha is actually net employment land currently in industrial / warehousing use (including vacant or derelict sites).
- A key factor in the difference between gross and net employment land levels is the level of employment land that has been 'effectively lost' to non-employment land related uses (including residential, retail and other uses). The loss amounts to 26ha.
- The general quality of employment land in Enfield is considered relatively good, with a range of sites and premises providing a diverse offer for the market. However, employment land supply in the borough is heavily concentrated towards a small number of large employment areas. For example Brimsdown alone accounts for 139ha of gross employment land, or 34% of the borough's supply.
- The level of vacant / derelict land in the borough provides potential land release opportunity but this needs to be balanced by projected demand. Currently vacant / derelict land amounts to 65ha of net employment land (almost 20% of the total).
- Employment in industrial / warehousing uses is forecast to remain static (+0.3%) in the period 2001 to 2016. The commensurate change in demand for employment land in the period is approximately 13ha.

- However, the demand assessment for the period 2005-2016 suggests that significant economic structuring has already taken place in the period 2001-2005 which increases the potential land demand in the period to around 28ha.

6.2 Business needs and requirements

The business survey has highlighted some important characteristics of Enfield companies that influence the demand for land and premises.

- The overall picture presented by the business survey is of a localised/sub-regional demand for land and premises from businesses. Most businesses were founded in Enfield or North London.
- In terms of characteristics, Enfield businesses surveyed were predominantly single site businesses (62%) or a branch/subsidiary of a UK business (34%); serving customers within North London or the wider Greater London area; and with a strong supply base in the area.
- Businesses on the whole are very satisfied with Enfield as a business location, with two-thirds rating their premises as good or very good and the same amount rating the surrounding area as good or very good.
- As a source for future demand for employment land the survey presents an optimistic scenario for the short-term. Almost two-thirds anticipate

business growth in the next three years and 32% plan to change premises in the same period.

- The motivation for changing premises is varied but key factors include the need for larger premises, better quality premises, and lease arrangements coming to an end. Of those wishing to move, 33% want to stay in Enfield and a further 21% in North London.

6.3 Summary: supply and demand

6.3.1 Employment land supply

This study has provided a detailed analysis and understanding of the employment land supply in Enfield through primary site survey. A total of 25 key employment clusters were identified and mapped during the survey.

The total land area of these 25 clusters (including roads and public space) is estimated at 404ha or around 5% of total land within the borough. However the analysis of these sites identified a total of 82 different employment land uses existing on these sites, a number of which can be classed as outside the classification of 'industrial / warehousing' uses. The removal of these sites results in the identification of the level of employment land used for industrial / warehousing' activities that equates to 333ha (82% of gross employment land). This is referred to as 'Net Employment Land in Industrial and Warehousing' use. Of this figure, 65ha (20%) is vacant or derelict and 14ha (4%) is in 'unclassified use'. An overall picture of the land supply in Enfield is provided in **Table 6-1** below.

Table 6-1: Enfield employment land supply summary

	Area (ha)
Gross employment land	404.2
Net employment land (excluding roads and public open space)	359.1
Net employment land in industrial/warehousing use (including unclassified uses)	333.2
Vacant or derelict land	65.0
'Unknown'	14.2

Source: Halcrow (April 2005)

Two key conclusions can be drawn from this analysis:

- First, what is demonstrated is that a proportion (16ha) of the identified stock of designated employment land in Enfield has in fact been lost to uses that are not classed as industrial / warehousing uses. **The result is that the 'actual' stock of industrial / warehousing sites and premises is significantly more constrained than overall levels of employment land designations suggest.**
- Second, a significant proportion of employment land in Enfield is categorised as 'vacant', 'derelict' or 'unknown'. This equates to 79ha of land from a gross total employment land figure of 404ha (20%). **This percentage is above the considered natural level of 10% vacant land.**

Quality of employment land

While the overall level of employment land stock is important, the quality and characteristics of the stock are also important in understanding the relationship between supply and demand. The key characteristics are summarised below.

- The most significant land uses by land area are food and tobacco, wholesale and warehousing which combined account for 41% of employment land area
- Enfield employment land is highly concentrated on a small number of large employment sites. Indeed, seven large employment areas account for 71% of net employment land within the borough
- An estimated 2.7 million m² of employment floorspace has been identified within Enfield
- In terms of the age and condition of employment buildings in Enfield, the survey indicates that the stock is generally good with vast majority of buildings being identified as ‘Good’ or ‘Reasonable’ (82%) and just under half having an estimated age of less than 30 years.

6.3.2 Employment land demand

With regards to demand, the forecast for employment land is subject to a high level of sensitivity, reliant as they are on employment forecasting data, employment density and plot ratios.

Under the Core Enfield employment demand scenario the forecast employment land demand in Enfield in 2016 ranges between 327ha and 388ha. This represents an increase in demand between 2001-2016

of 11ha and 15ha. **Taking the mid-point, we estimate that employment land demand in Enfield in 2016 will be 357ha, an increase of 13ha in the period 2001-2016.**

Table 6-2: Enfield land demand scenarios

	Land requirements in 2016 (ha)	Change 2001-2016 (ha)	Change 2005-2016 (ha)
Enfield	357	13	28

Source: Halcrow

6.3.3 ‘Land requirement’ for Enfield

The context for the EELS study is the NLELS study and the earlier RTP Industrial and Warehousing study, both of which assumed that ‘at any point in time, the planned supply and market demand for industrial/warehousing land will be in balance if supply equals the demand for occupied land, plus margins of vacant land and vacant floorspace to allow for smooth operation of the market’.

Therefore the important consideration for policy purposes is to focus on *change* in supply and demand over the relevant planning period with this change referred to as the ‘land requirement’ (or land release if negative). In this respect the desired change in planned supply equals structural change in demand, plus required change in vacant land / floorspace, plus intensification.

As noted above, the **change in demand for employment land is forecast to be between 11ha and 15ha for the period 2001-2016.** However, it also shows that in the period 2005-2016 the demand

increase is higher (26ha to 31ha) and implies that a greater adjustment to the supply of employment land is required for this period.

With regards to **vacant land and floorspace**, there needs to be a natural level of vacant land to facilitate the effective operation of the market. Within Enfield the site survey identified that 65ha (19.5%) of net industrial/warehousing land is vacant¹⁹, which is higher than the generally considered natural percentage rate of around 10%. Reducing vacant land to 10% of existing net industrial/warehousing stock (approximately 33ha) indicates a potential vacant land release of 32ha by 2016.

Intensification has been considered through the sensitivity of employment density and plot ratios. While the employment density underpins the range in demand requirements, demand is not sensitive to plot ratios and therefore this has not been incorporated in the land requirement calculation.

The conclusion is that Enfield Borough's land requirement for the period 2001-2016 is -17ha to -21ha. It is considered possible to accommodate this requirement without constraining the economy of the borough. However, the analysis estimates that in the period 2005-2016 the potential land requirement is significantly lower at between -1ha to -6ha on the basis that the most significant

structural change in the industrial and warehousing sectors has already taken place.

Table 6-3: North London land requirements, 2001-2016

	2001-2016 (ha)	2005-2016 (ha)
Change in Structural Demand	+11 to +15	+26 to +31
Change in Vacant Land required	-32	-32
Total Land Requirement	-17 to -21	-1 to -6

Source: Halcrow

Therefore we consider there to be very limited scope for employment land release within Enfield. The analysis suggests that the existing stock of vacant land and premises can be used to meet future demand and still leave sufficient 'vacancy' levels to allow smooth market operation. Limited and small scale land release may be appropriate where sites are clearly not marketable or where intensification / redevelopment for employment use creates opportunities for other adjacent uses.

¹⁹ 'Vacant land' as defined by the survey includes vacant/derelict sites and sites containing vacant/derelict floorspace.

7 Cluster appraisals and policy recommendations

7.1 Introduction

The final section of the study appraises each of the employment clusters in Enfield and provides broad policy advice on the potential or otherwise for land release (within the context of the key findings above). The aim is to provide analysis and comment to help inform Enfield Council on potential Employment Land Policy and issues associated with individual sites.

7.2 Methodology

The appraisal approach brings together the supply and demand analysis to provide analysis of the constraints and opportunities for the borough and individual site clusters. Two specific appraisal techniques have been used to derive the policy response:

- Market Appraisals that consider the current market context and potential future opportunities of each employment land cluster in Enfield
- A Multi-Criteria Appraisal (MCA) of each cluster in order to be able to create a ranking system for the borough's clusters.

7.2.1 *Multi-criteria analysis (MCA)*²⁰

The MCA presented within this study has been developed by Halcrow to provide a reasoned assessment framework. In total 21 assessment criteria

were identified. For ease of understanding and assessment these criteria have been grouped according to the following categories:

- Group 1 – Strategic issues
- Group 2 – Physical arrangements, local access and site quality
- Group 3 – Strategic transport access and supporting infrastructure
- Group 4 – Buffer areas and sensitive receptors
- Group 5 – Policy considerations

The criteria listed under **Group 1 – Strategic issues** are:

- **Proportion of vacant / derelict sites**
- **Strategic mix and distribution of sites**
- **Strategic reallocation of the site usage**

The criteria listed under **Group 2 – Physical arrangements, local access and site quality** are:

- **Overall cluster area and floorspace**
- **Age and quality of buildings**
- **Quality of public realm**
- **Provision of drainage, lighting and security**
- **Quality of parking and internal circulation**
- **Operation of potentially contaminative uses –**

²⁰ See Appendix A for detailed MCA criteria and matrix

The criteria listed under **Group 3 – Strategic transport access and supporting infrastructure** are:

- **Connections to highway network**
- **General public transport accessibility**
- **Distance to local railway station**
- **Distance to local shops and services**

The criteria listed under **Group 4 – Buffer areas and sensitive receptors** are:

- **Distance to residential receptors**
- **Distance to natural receptors**
- **Distance to surface water receptors**
- **Interaction / conflicts between cluster and surrounding uses**

The criteria listed under **Group 5 – Policy considerations** are:

- **Linkages with existing regeneration policies, programmes and projects**
- **Current local employment issues and deprivation levels**
- **Potential to assist in the achievement of economic development targets**

Criteria assessment levels and weighting

MCA requires each criteria to be scored as to the extent to which the cluster achieves the criteria described. For this appraisal a five point scale is used with **1 – Strongly Negative** to **5 – Strongly Positive**. The scores are then weighted according to the importance of each criteria grouping. The weightings have been assessed as shown in **Table 7-1** below and have been chosen to provide a maximum weighted score of 500 for any cluster.

Table 7-1: Weighted assessment against criteria groups

Criteria	Weighting
Group 1 – Strategic Issues	35
Group 2 – Physical Arrangements, Local Access and Site Quality	25
Group 3 – Strategic Transport Access and Supporting Infrastructure	15
Group 4 – Buffer Areas and Sensitive Receptors	15
Group 4 – Policy Considerations	10
Total	100

Source: Halcrow

7.2.2 **Policy response recommendations**

Each cluster was allocated to one of the following assessment tiers based on the above analysis:

- **Red clusters** – These typically contain vibrant and robust businesses, have predominately good quality modern buildings and are reasonably well connected to the existing transport systems. As a result it is recommended that they are retained for employment use and that any change of use is strongly contested.
- **Yellow clusters** – These clusters have a mix of building and access quality and in some cases are located close to sensitive receptors. For many there is a need for additional investment in the clusters and as a result it is recommended that while the majority of the cluster should be retained for employment uses it may be appropriate for a portion of the cluster to be released for other uses to help finance these site improvement works.
- **Green clusters** – These clusters were found to typically be run down, poorly connected to transport infrastructure (often through residential streets) and largely surrounded by sensitive receptors (such as housing). As a result it is recommended that an appropriate change of use is allowed for these clusters.

7.3 **Market appraisal results**

The market appraisal results for Enfield are presented in **Table 7-2**. The assessment was undertaken in 2006 and provides a commentary on the current status of each cluster and its future development potential.

Table 7-2: Enfield cluster property market assessment

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
EN001 – Chase Side Works	<ul style="list-style-type: none"> The “rear” of a site, accessed from Linden Way has recently been developed for residential by Furlong Homes. The section fronting Chelmsford Road and shown as Chase Side Works is a collection of high density buildings with almost no parking or none kerbside access. Appears to be constructed in part at the turn of the century with additional buildings circa 1930’s. 	<ul style="list-style-type: none"> A small employment site (<2ha) of mixed quality. The site is only accessible via residential streets and is surrounded by established residential areas. Remaining section ideal for a change of planning use due to lack of modern facilities, poor access both physically and via the road network.
EN003 – Regents Avenue	<ul style="list-style-type: none"> High density site in multi occupation. Main access off Green Lanes and Regents Avenue which is adjacent to the bus depot. The site access is very narrow and the estate is congested. Part of the original site actually fronts the A406 North Circular and is now occupied by a furniture factory/retail outlet together with a tyre shop / garage. 	<ul style="list-style-type: none"> A small employment site (<2ha) of mixed quality. The site is only accessible via residential streets and is surrounded by established residential areas. The “rear” of the site accessed off Regents Avenue is ideally suited for a change of planning use, subject to access.
EN004 – Oakthorpe Dairy	<ul style="list-style-type: none"> The west of the side as identified is entirely occupied by Arla Foods plc. Clearly this is a bespoke operation with a substantial amount of plant and modern looking warehouse building plus ancillary offices. To the west of Chequers Road within the prescribed area is in fact now residential low rise flats 	<ul style="list-style-type: none"> Situated almost adjacent to the A406 North Circular Road but still amongst residential. Road layouts have clearly been incorporated off the North Circular to accommodate tankers and other articulated vehicles. Definite potential to transfer site to other planning uses notwithstanding difficulties in relocation.
EN005 – New Southgate Industrial Estate	<ul style="list-style-type: none"> Two distinct “estates” linked by the same Lower Park Road access. The initial section, New Southgate Industrial Estate, comprises approximately 20 units which would appear to be constructed during the late 1950’s and of brick frame construction under a pitched asbestos profile clad roof. Occupiers are a mix of regular warehousing/industrial together with garaging/MOT/tyres, tile retail “warehousing” and similar. Fronting the A406 North Circular Road is Alexander Place which comprises two more modern buildings (circa 1985) one of which now houses a specialist Indian Funeral Directors, the latter is a tile retailer. Despite the estates original age, access and circulation space for vehicles around the estate is relatively good and access from the North Circular Road is excellent. 	<ul style="list-style-type: none"> A small employment site (<2ha) of mixed quality of sites. Given its location and proximity to residential areas, there is potential for redevelopment for non-employment uses. Notwithstanding the A406 North Circular Road frontage sections of the estate would be suitable for a change in planning use.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
EN006 – Redburn Trading Estate	<ul style="list-style-type: none"> • Circa 1970's construction, generally good layout and still popular with a wide variety of users. However, access to this site is difficult and only through predominantly residential area. 	<ul style="list-style-type: none"> • In terms of location this site would be an ideal candidate for a change of use but it is however nearly fully occupied, commands good rentals and does not frequently suffer void periods. It is also in fragmented ownerships.
EN007 – Queensway	<ul style="list-style-type: none"> • Queensway is a road running off the busy Hertford Road but within a predominantly residential area. To the north is situated Tesco Superstore and to the north west a bus depot, each accessed via Southbury Road. • On both sides of Queensway are fragmented industrial units, some single and some multi storey. The majority in different ownership. Occupiers vary from those in sub 1,000 sq ft units up to old large single storey units. Almost all units have very high site densities and thus parking is at a premium. Buildings typically 1920's-1950's. 	<ul style="list-style-type: none"> • Although fragmented, this is a prime area for a change in planning use. The layout would allow the retention of some commercial element as part of a mixed use area. To the southern side the site abuts the large Middlesex University Campus. • Potential future redevelopment subject to land ownership is necessary.
EN008 – Harbert Road Estate	<ul style="list-style-type: none"> • A large tranche of industrial sites / buildings situated south of the A406 North Circular Road, close to the LBE / LBWF boundary. Substantial number of occupiers within small to medium sized units. The only occupier of single note would be the Department of Transport Goods Vehicle Testing Centre. • The site is effectively divided into five key sections: <ul style="list-style-type: none"> • At the entrance is the multi storey Skillion building which is now occupied as self storage and business space on a room by room basis. This building has now been purchased by the owners of Stonehill Business Park below and therefore clearly increases their land holding in this location. • The Stonehill Business Park, 500,000 sq ft of mixed industrial / warehouse space. • Hastingwood Trading Estate, a privately owned holding of numerous small units which are on short to medium term leases • Lea Valley Trading Estate, small to medium size industrial units • Edmonton Wharf, in differing ownerships but generally low density sites, often used for open storage. Occupiers include Arriva buses. • In general terms the stock would be considered adequate, in generally good order and meeting a requirement within the market place. 	<ul style="list-style-type: none"> • An extensive industrial holding, relatively isolated in public transport terms and some distance from any residential. • Not considered suitable for transfer of planning use.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
EN009 / EN014 / EN026 – Meridian Way Land / Glover Drive / Kimberly Road	<ul style="list-style-type: none"> The BOC site is accessed from the A406 slip road to the west of Pymmes Brook. On that site sits approximately 80,000 sq ft of old high bay warehousing together with a large amount of yardage/open storage and ancillary offices. The site is now owned by Dwyer Estates. To the east of Pymmes Brook, and to the west of Tesco/Glover Drive, Ikea have now completed and opened their latest UK store on land formerly owned by Secondsite (British Gas). To the south of the site and to the rear of BOC, is land still in the ownership of Secondsite and with a gas holder thereon. This is currently accessed via Leaside Road. To the west of Meridian Way is a further Secondsite property known as “The Teardrop”. This vacant site has recently been brought to the market and it is likely that best bids will be sought within the near future. The planning brief outlines B1/B2/B8 plus possible leisure and trade counter uses. 	<ul style="list-style-type: none"> Large amount of land is available for development and accessibility to the area is good. The overall site(s) offer significant future development opportunity but they are isolated from other residential uses and associated amenities The area is considered unsuitable for a change of planning use unless a significant “master plan” can be drawn up which, given Ikea’s recent development, is probably unviable.
EN010 – Montagu Industrial Estate / Kenninghall Estate / Railtrack Lands	<ul style="list-style-type: none"> Montagu Industrial Estate – hugely fragmented industrial area around Pegamoid Road, Princes Road, Stacey Avenue and First Avenue. Very wide diversity of building types, the vast majority being probably 1920’s/30’s with some 1950’s additions. Large concentration of “dirty” users including RMC Aggregates, Hanson Aggregates, Waste Transfer station, car breakers and scrap metal merchants interspersed with car repairers and mechanics. The aforementioned users tend to be low density occupiers but Pegamoid Road has a number of larger warehouses/office facilities, many of which now appear to be in multiple occupation. All of the Montagu Estate is accessible only from turnings off Montagu Road which is predominantly residential, internal roadways acceptable for articulated vehicles but not up to modern standards. Kenninghall – situated to the south of the cluster, accessed from Kenninghall Road and adjacent (but not accessible from) the A406 North Circular Road and abutting the railway line. The vast majority of Kenninghall is in one ownership and occupied by a large scrap metal company. A small unit industrial estate in the middle is in private ownership whilst there are two car park areas believed to be in the ownership of the LBE. Site is very accessible being just off the North Circular Road and would be in high demand from certain high profile commercial occupiers. Railtrack land – situated directly between Montagu and Kenninghall 	<ul style="list-style-type: none"> Montagu Industrial Estate – putting aside the huge fragmentation of ownerships the site uses are considered unsuitable for its surroundings. Notwithstanding the difficulties in relocating its occupiers a change of planning use could be considered. Railway land – highly suitable for a change of planning use particularly since it would appear that this could be developed in isolation save for the fact that some boundaries would directly abut the “dirty” users on Montagu Estate as mentioned above. Kenninghall – potentially suitable for transfer to other uses but is well located in commercial and industrial terms and thus is a key employment area.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
EN011 – Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	<p>Estates and beneath the level of the raised Conduit Lane is an area of land probably previously used as a shunting yard or sidings but now disused. Accessed from Rays Avenue / Rays Road.</p> <ul style="list-style-type: none"> • Dominion Business Park is approximately ten units which either front, or back on to the railway line. Restricted parking and access, fragmented freehold ownership. • Horizon Business Centre – constructed as a joint venture with the local authority within the last six years, small freehold (long leasehold) units (No. 9) which are fully occupied and would be considered very good product in the market place. • Claverings Industrial Estate – a very odd estate, the majority being two storey. Difficult access within the estate, not really ideal for articulated vehicles. Believed to be in the ownership of the local authority, contains a number of non industrial users such as NHS Trust offices, council stores, council admin etc. Assume some of the occupiers are small office users at first floor level. Highly multi let. 	<ul style="list-style-type: none"> • Dominion Business Park – rarely vacant but far from ideal in the modern environment, new(ish) residential development on site directly adjacent. • Horizon Business Centre – quality product situated between two sites which are ideally suited for a change in their planning use. • Claverings Industrial Estate – highly unsuitable in the modern environment, ideal candidate for change of planning use.
EN012 – Langhedge Lane Industrial Estate	<ul style="list-style-type: none"> • Langhedge Lane Industrial Estate is a classic two terraced scheme, one half of which would appear to have been constructed during the late 1970's / early 1980's of a traditional frame, half brick / half clad skin under a pitched roof. The opposite terrace is of a design and construction which is somewhat older and now looks tired. • However the estate appears to be fully occupied, albeit hugely congested with vehicles. Situated just off Fore Street, Edmonton, a short distance from the A406 North Circular Road. 	<ul style="list-style-type: none"> • Situated directly adjacent to residential and therefore poor articulated vehicle access but nevertheless clearly servicing a need locally for SME's. • Suitable for a change in planning use but also clearly a good local employment generator.
EN013 – Commercial Road and North Middlesex Estate	<ul style="list-style-type: none"> • This cluster refers to a large number of fragmented occupiers but also directly abuts similar in the London Borough of Haringey • The two largest occupiers are the former Rayner Dairy (see comments) and Hall Flooring, the remainder are in highly fragmented ownerships • Situated within an entirely residential area, abutted by the railway line to one side and with access only possible through residential areas. There is limited parking and internal circulation is a problem. 	<ul style="list-style-type: none"> • Whilst Rayner Dairy was sold twelve months ago to Terrace Hill, it now appears to be back on the market for sale or to let. • The entire area is suitable for transfer into residential uses as the vast majority of stock is obsolete in the current market place and there is sufficient ownership to begin development • To the south of this commercial area, within Haringey, a large social housing development is underway on land which was partly commercial in the past.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
EN015 – Eley's Estate	<ul style="list-style-type: none"> • Eleys Estate is one of the largest and most fragmented single industrial areas in the borough. Key occupiers/facts as follows. • The largest single occupier is Coca Cola (North London) Limited who have a significant holding and have been established on this site for many years. They have recently purchased additional buildings and have demolished in readiness for erection of bespoke units. This, despite circulation and accessibility within the estate being difficult. • To the north of the cluster is a large property holding occupied by Hub La Bas, specialist engineering operation, again well established on the estate. • To the southern end, and fronting the A406 North Circular Road (but with no direct access) is approximately 100,000 sq ft of warehousing occupied by Reality who distribute on behalf of Argos. Circa 1950's buildings and difficult to operate from. This investment/redevelopment opportunity has recently been sold with a view to future demolition. • Adjacent to the Reality building, fronting the North Circular Road, is the former Parker Knoll site. Big Yellow Self Storage has now constructed their own unit and has sub-sold the adjacent land to Chancerygate Developments who have commenced construction of a ten unit industrial/warehouse scheme. • Adjacent to the aforementioned, but outside of the cluster, are a number of retail warehouses. • The balance of occupiers, many of whom will own their own freeholds, are generally small to medium sized companies. 	<ul style="list-style-type: none"> • It is not contiguous at any point to residential and is therefore unsuitable for any movement in the planning use.
EN016 – Innova Park	<ul style="list-style-type: none"> • Former Water Board land, the northern section is still owned by Kennett (the property arm of Thames Water). Their holding remains at about 8 acres and they are seeking pre-let / design and build opportunities. • The northern section is zoned for industrial/warehousing, the southern section was originally envisaged as a Science and Innovation Park. • The northern section has in parts be sold and developed, occupiers include JJ Fast Foods, Deluxe Video (Rank) and Iceland Frozen Foods. In addition the site to the northern most tip, and adjacent to the roundabout, has been sold to Kier Properties who should shortly commence construction of a new 45,000 sq ft industrial scheme. We understand that some further tranches of industrial land may be released by Kennett in due course. 	<ul style="list-style-type: none"> • There is a large amount of land available for development. • The northern industrial section of the site is thriving and rarely abuts residential. However, the southern section is directly adjacent to residential. • An outline planning application for Innova Park was approved in Feb 2005 with uses on five vacant plots including residential on the southern portion of the site, a secondary school Academy (D2 use), as well as B1 & A1 uses.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
	<ul style="list-style-type: none"> The southern section was partially speculatively developed as a joint venture approximately five year ago. This houses three office buildings in what was hoped to be the start of a Science "Park". Two of the buildings were let to LBE as BIC (Business Innovation Centre). Unfortunately that business has not proved viable and the matter effectively went in to Receivership. Scarborough Developments took possession of one building, the original BIC Centre is in the process of being sold as an ongoing "business". In addition to the above an "H" shaped two-storey office building totalling sub 32,000 sq ft was constructed by Scarborough and has let slowly in sections over the last few years. During early 2006 Scarborough Plc disposed of this building by way of an investment sale along with the property formerly known as BIC Two. The remainder of the land's southern section which was originally a Scarborough/LBE joint venture with a vision for a "Science Park" has not progressed 	
EN017 – Hertford Road / Mollison Avenue	<ul style="list-style-type: none"> A significant site, effectively in two unequal sections, part having frontage highly visible from the M25. Access to the site generally is via High Street, Waltham Cross or Mollison Avenue. Western warehouse on the site is of a significant size, constructed less than ten years ago and will be considered desirable modern stock. The northern and eastern sector was formerly occupied by ESAB, formerly part of BOC and comprised what would effectively have been a head office and warehouse facility incorporating a large section of 1950's "northlight" warehousing, a detached 1950's office building with ancillary facilities such as canteen, social club etc. Other buildings have been added on the site in more recent years. The former ESAB site has been purchased by Gazeley / Morley Fund Management and planning consent submitted for a substantial single "shed" warehouse together with some ancillary buildings. During the summer of 2006 the existing old buildings on site were extensively damaged by fire and at the time of writing demolition appeared to have commenced. 	<ul style="list-style-type: none"> Given the location adjacent to the M25, and its proximity to the key industrial areas of Brimsdown etc. the vast majority of the site is not suitable for a change in planning use. However, a small section of the site which fronts Hertford Road, Waltham Cross could potentially be suitable for residential.
EN018 – Meridian Business Park	<ul style="list-style-type: none"> Cluster incorporates two distinct areas. Valley Link Estate, Morson Road and Riverside Estate, all accessed from the A1050 Meridian Way. The major occupier within this area is 	<ul style="list-style-type: none"> The properties accessed from Meridian Way (i.e. Valley Link, Riverside etc) are within the core industrial zone and are unsuitable for changes in use.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
	<p>Visteon (formerly part of Ford Motor Company) together with various local occupiers. The Visteon site does have rear access onto Wharf Road but this is not a public highway.</p> <ul style="list-style-type: none"> Wharf Road – this is accessed only from Valley Road and is therefore slightly off the main industrial A1050 route. The Wharf Road section is home to four or five occupiers in fragmented ownerships and with differing style and ages of buildings. 	<ul style="list-style-type: none"> The Wharf Road properties would have a similar argument applied. However, it should be noted that some of the properties in Wharf Road to the north west corner do abut the River Lea Navigation and as such are in a slightly less “industrial” setting. There is a large amount of land available for development.
EN019 – Aztec 406 Development Site	<ul style="list-style-type: none"> Size of site originally circa 20+ acres originally owned by Kennett Properties (Thames Water). Kennett sold part of the site to ProLogis who have constructed a new 80,000 sq ft warehouse unit for Heales Furnishing and are just about to complete a 190,000 sq ft speculative warehouse facility adjacent. Land was also sold to Lidl for a distribution centre which is now constructed. The final 7 acres was sold to Bestway Cash & Carry who now have a consent for their own bespoke building and will also potentially be constructing up to 80,000 sq ft of speculative warehouse space. 	<ul style="list-style-type: none"> Substantial site in the core of the employment area, no surrounding residential and therefore no associated facilities. Unsuitable for transfer to other planning uses.
EN020 – Brimsdown	<ul style="list-style-type: none"> Brimsdown is a long established industrial heartland of the LBE and of such a significant size that it is allegedly the second largest concentration of industrial buildings and occupiers in London outside of Park Royal. The area is relatively neatly confined by the railway line to the west and the King Georges Reservoirs to the east. The A1055 Mollison Avenue runs roughly parallel with the railway line through Brimsdown and the road has been significantly improved in recent years connecting southwards with the North Circular and northwards with Junction 25 of the M25. A full description of stock in Brimsdown would be overly long. Ownership varies between substantial pension fund down to small independent occupiers and the type of stock available is as varied. Poorer quality 1930’s low eaves buildings still exist (Lockfield Avenue, Aden Road, Bilton Way) alongside major new developments such as the Dencora Centre; Mollison Avenue, Delta Park; Millmarsh Lane and The Arena; Mollison Avenue. 	<ul style="list-style-type: none"> Given its established layout and “contained” nature Brimsdown generally would not be considered suitable for a transfer of planning uses.
EN021 – Great Cambridge	<ul style="list-style-type: none"> EN021 effectively encompasses four separate areas. Most prominently is the GE Lighting works which sits at the junction of 	<ul style="list-style-type: none"> GE Lighting - older high density and now obsolete type of building but in too highly a

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
Industrial Estate	<p>Lincoln Road and Great Cambridge Road with rear access from Progress Way.</p> <ul style="list-style-type: none"> To the west of the edged area and accessed from Lincoln Road is a British Telecom depot. Between these two holdings and with access from Lincoln Road (with additional from Progress Way) is Great Cambridge Industrial Estate. This estate is owned and managed by Brixton plc who have now demolished all of the older factory/depot buildings to the rear and has just completed a new 96,000 sq ft scheme which is known as A10 Exchange but is effectively an extension of Great Cambridge Industrial Estate. To the south of Progress Way is an older collection of one and two storey commercial buildings, some of which have frontage to the Great Cambridge Road but the remainder are fragmented. 	<p>prominent position to consider residential use.</p> <ul style="list-style-type: none"> Great Cambridge Industrial Estate/A10 Exchange - modern, popular and usable. Not suitable for transfer of use. BT Depot – low density use at the current time, adjacent to railway line and behind residential so potentially suitable for transfer of use but industrial demand for such an opportunity would still be high. Holdings to the south of Progress Way – fragmented ownership, poor quality stock but in the light of comments above probably unsuitable for movement into other uses.
EN022 – Great Cambridge Road (Martinbridge Trading Estate)	<ul style="list-style-type: none"> This cluster refers to several property holdings, the key centre of which is the industrial estate known as Martinbridge Trading Estate. Most prominently, at the corner of Lincoln Road and Great Cambridge Road is the new Stephen James BMW showroom. This is an expensive and highly identifiable new feature. To the rear of the above, and to the south of the A10 frontage are various detached buildings, at least two of which are retail warehousing. Head Office and distribution facilities for Ikon copiers etc. Martinbridge Trading Estate, constructed in the 50's/60's, fully occupied and with Stephen James BMW having taken a significant holding on this estate during the last few years where they have created at great expense a bespoke workshop/repair facility for BMW cars. 	<ul style="list-style-type: none"> BMW showroom and those fronting A10 Great Cambridge Road unsuitable for transfer into other uses. Martinbridge Trading Estate, whilst adjacent to residential is a core commercial area, albeit it is believed to be in one freehold ownership.
EN023 – Great Cambridge Road	<ul style="list-style-type: none"> Three separate and distinct property holdings. Haslemere Business Centre, a collection of seven industrial units constructed during early 1970's. Accessed only from Lincoln Road. An original access from Southbury Road appears to have been blocked up. Allied Pickfords occupy the major property holding which is situated fronting Southbury Road (although at a lower level to the road itself). Adjacent to the railway line and Southbury station. Lombard House a detached office building on its own small site, fronting Southbury Road and on the entrance to the retail park/Morrisons supermarket entrance. Once part of a significant office holding in this 	<ul style="list-style-type: none"> Haslemere Business Centre – fragmented ownerships but still relatively sought after. However, its access is alongside residential and it fully backs onto residential dwellings on two boundaries. Could potentially be integrated into the residential envelope. Allied Pickfords building constructed circa 1990 and thus meets all modern requirements for warehouse occupiers. Building therefore likely to be in demand, probably not suitable for movement into other uses as a high profile

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
	<p>road by Lombard Credit, now believed to be their only occupancy following disposal of others.</p>	<p>site.</p> <ul style="list-style-type: none"> Lombard House – unsuitable for conversion at this stage given its relative modernity. Would be in demand by occupier companies and site too small in isolation. Possible flat conversion as and when office building becomes obsolete.
<p>EN024 – Great Cambridge Road</p>	<ul style="list-style-type: none"> Area shown covers quite a considerable and diverse industrial/commercial area which is briefly as follows: A10 Great Cambridge Road – shown to the north of the site plan. Buildings shown were originally in the majority 1930's industrial buildings of relatively high density on individual plots. One or two have been redeveloped to create purpose built Head Office/warehouse facilities but in the main the sites have moved into other uses, namely retail car showrooms. Adjacent to these is the British Car Auction site which has been established in this location for many years and was redeveloped into a bespoke facility during the last ten years. Baird Road – a handful of industrial occupiers along this road which backs onto B & Q, Sainsburys etc. Popular location due to its relatively high prominence, fragmented ownerships. Crown Road – at the current time the area within Enfield with most potential development activity. To the north of Crown Road the former Yoplait dairy head office and site has been redeveloped to incorporate Selco Builders Merchants and Renault car showroom. Development by Kier Properties. To the rear of the above site Kier Properties have now purchased the former Carlton Luggage site which will be known as Phase Two. The previous high density building was demolished and planning consent has been obtained for three buildings between 20,000 and 40,000 sq ft. Construction due to commence Autumn 2006. The site adjacent (to the south of Carlton Luggage) has now been sold to Canmore Developments who are currently constructing 100,000 sq ft warehouse unit which has been pre-let. The remainder of Crown Road is in separate freehold ownerships, including private individuals and Morley Fund Management with the exception of the lorry park which we believe is owned and operated by the local authority. Henkel House – situated at the junction of Baird Road and Southbury 	<ul style="list-style-type: none"> A10 Great Cambridge Road – these properties are unsuitable for a return to alternative uses due to combination of location and high commercial end values. However, it is noted from the OS maps that if the rear section of the car auction site were to perhaps be incorporated within a future master plan then some or all of the site adjacent to this could be potentially viable. Baird Road/Crown Road – in high demand from occupiers and a key employment area which is not contiguous to any residential element and thus unlikely to be suitable for alternative uses. Henkel House could potentially be suitable for conversion to residential once the building becomes unviable in terms of office occupation.

Cluster number and name	Cluster description and recent market activity	Comments (cluster vitality, potential improvements, other possible uses, etc)
	Road. Four storey building constructed 1970's (believed for Lombard Finance) with undercroft parking. Has struggled to let over the last few years due to low parking ratio but given lack of availability in the area it is unlikely to transfer to another use as freehold values would exceed conversion cost.	
EN025 – Alma Industrial Estate	<ul style="list-style-type: none"> This cluster is effectively bounded to the east and west by Alma Road and Alexander Road is a collection of various industrial buildings, sites and occupiers which are very well established but are now situated in a location which is very poorly accessed for modern commercial vehicles. The buildings are a mix of types and ages but the vast majority probably date from the inter and post war periods and are thus generally high density causing additional parking problems in the surrounding roads. Moreover the area is in multiple ownership in unit sizes down to as little as 1,000 sq ft. 	<ul style="list-style-type: none"> Highly suitable for a transfer to residential uses, indeed parts of the Alexander Road frontage have clearly been developed over recent years. Access to the area is entirely via residential routes and housing abuts almost all boundaries. Whilst ideal for residential the lack of any major single ownerships will make such matters difficult in terms of site assembly.

Source: Glenn

7.4 Multi-criteria appraisal results

All Enfield employment clusters have been appraised according to the criteria. This process has allowed clusters to be individually scored and ranked within the borough. The summary of the cluster score results and rankings are provided in **Table 7-3** below, along with their existing Enfield planning policy designations.

For more detailed information on the MCA assessment criteria and impact matrix please see **Appendix A**, and **Appendix B** for the in depth cluster analysis and scoring results.

Table 7-3 Enfield cluster appraisal results

Cluster Number and Name	Assessment Score						Assessment Ranking	Existing Planning Policy Designation ¹
	Group 1	Group 2	Group 3	Group 4	Group 5	Total		
EN001 – Chase Side Works	128	54	38	38	13	271	23	Other Employment Area
EN003 – Regents Avenue	117	67	56	26	23	289	22	Other Employment Area
EN004 – Oakthorpe Dairy	128	92	38	15	30	303	21	Local Employment Area
EN005 – New Southgate Industrial Estate	117	75	60	34	37	322	16	Other Employment Area
EN006 – Redburn Trading Estate	117	92	45	34	40	327	13	Other Employment Area
EN007 – Queensway	117	58	49	53	33	310	19	Other Employment Area
EN008 – Harbert Road Estate	128	100	41	45	43	358	1	Other Employment Area
EN009 / EN014 / EN026 – Meridian Way Land / Glover Drive / Kimberly Road	117	83	49	49	48	344	7	Meridian Way Land and Glover Drive (Part) – Local Employment Area Kimberly Road – Other Employment Area
EN010 – Montagu Industrial Estate / Kenninghall Estate / Railtrack Lands	128	79	49	38	43	337	10	Local Employment Area
EN011 – Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	128	75	41	45	27	316	18	Local Employment Area
EN012 – Langhedge Lane Industrial Estate	117	67	45	49	27	304	20	Local Employment Area
EN013 – Commercial Road and North Middlesex Estate	128	75	41	45	33	323	15	Local Employment Area
EN015 – Eley's Estate	117	79	49	56	43	344	8	Prime Employment Area
EN016 – Innova Park	93	100	45	53	37	328	12	Prime Employment Area
EN017 – Hertford Road / Mollison Avenue	105	96	56	49	37	343	9	Prime Employment Area
EN018 – Meridian Business Park	93	83	49	53	40	318	17	Other Employment Area
EN019 – Aztec 406 Development Site	117	100	41	53	43	354	3	Prime Employment Area
EN020 – Brimsdown	128	88	49	53	40	357	2	Prime Employment Area

Cluster Number and Name	Assessment Score						Assessment Ranking	Existing Planning Policy Designation ¹
	Group 1	Group 2	Group 3	Group 4	Group 5	Total		
EN021 – Great Cambridge Industrial Estate	117	83	53	49	33	335	11	Prime Employment Area
EN022 – Great Cambridge Road (Martinbridge Trading Estate)	128	79	56	49	33	346	4	Prime Employment Area
EN023 – Great Cambridge Road	128	79	60	45	33	346	5	Prime Employment Area
EN024 – Great Cambridge Road	117	83	60	53	33	346	6	Prime Employment Area
EN025 – Alma Industrial Estate	128	75	49	38	37	326	14	Other Employment Area

Source: Halcrow, Note: 1 The definitions for Prime Employment Areas (PEA), Local Employment Areas (LEA), and Other Employment Areas (OEA) within Enfield are provided in Section 4 of this report.

7.5 Recommended policy responses

Three tiers of policy response recommendations (red, yellow and green) have been prepared for the Enfield employment land clusters based on the combination of the market appraisals and the MCA results. These policy response recommendations are presented in **Table 7-4** from which it can be seen that:

- **Thirteen** of the Enfield clusters have been identified as **Red Clusters** (i.e. any change of use should be strongly contested)
- **Eight** of the Enfield clusters are classified as **Yellow Clusters** where a partial change of use could be considered, provided that it is used to assist with the retention of employment uses on the remaining areas
- Only **two** of the Enfield clusters have been categorised as **Green Clusters** where a change of use is considered appropriate

Table 7-4 Recommended cluster policy responses

Cluster Number and Name	Response Tier	Recommended Policy Response
EN001 – Chase Side Works	Green	<ul style="list-style-type: none"> • A change of use is considered appropriate • While it is a reasonable cluster it is poorly located and significantly constrained by local housing
EN003 – Regents Avenue	Green	<ul style="list-style-type: none"> • A change of use is considered appropriate • While a reasonable cluster it is poorly located and constrained by local housing
EN004 – Oakthorpe Dairy	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a vibrant cluster it is constrained by a poor location and surrounding housing
EN005 – New Southgate Industrial Estate	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a vibrant cluster it is constrained by a poor location and surrounding housing
EN006 – Redburn Trading Estate	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a vibrant cluster and has good transport connections it is constrained to some degree by the surrounding housing
EN007 – Queensway	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a reasonably vibrant cluster due to its proximity to existing retail / commercial operations and its fragmented arrangement there is the potential for some land release
EN008 – Harbert Road Estate	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN009 / EN014 / EN026 – Meridian Way Land / Glover Drive / Kimberly Road	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN010 – Montagu Industrial Estate / Kenninghall Estate / Ralltrack Lands	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested

Cluster Number and Name	Response Tier	Recommended Policy Response
EN011 – Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a vibrant cluster and has good transport connections it is constrained to some degree by the surrounding housing
EN012 – Langhedge Lane Industrial Estate	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a vibrant cluster and has reasonable transport connections it is constrained to some degree by the surrounding housing
EN013 – Commercial Road and North Middlesex Estate	Yellow	<ul style="list-style-type: none"> • Partial change could be considered provided that it is used to assist with the retention of employment land on the remaining areas • While it is currently a vibrant cluster and has reasonable transport connections it is constrained to some degree by the surrounding housing
EN015 – Eley's Estate	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN016 – Innova Park	Yellow	<ul style="list-style-type: none"> • Partial change (in line with the approved masterplan) should be implemented and used to assist with the retention of employment land on the remaining areas • This is a very large site with significant portions undeveloped with some areas being very close to existing housing. In addition it is understood that a new school is being constructed on part of the site. As a result while the majority of the site should be safeguarded for employment land uses there is the potential to release some land for other uses.
EN017 – Hertford Road / Mollison Ave	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN018 – Meridian Business Park	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN019 – Aztec 406 Development Site	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN020 – Brimsdown	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN021 – Great Cambridge Inds Estate	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN022 – Great Cambridge Road (Martinbridge Trading Estate)	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN023 – Great Cambridge Road	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN024 – Great Cambridge Road	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested
EN025 – Alma Industrial Estate	Red	<ul style="list-style-type: none"> • Any change of use / release of land should be strongly contested

Source: Halcrow

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Appendix A Cluster MCA assessment matrix

Table A1 Cluster MCA Assessment Criteria and Impact Matrix

Assessment criteria	Impact levels				
	1 – Strongly negatives	2 – Negative	3 – Neutral	4 – Positive	5 – Strongly positive
Group 1 – Strategic issues					
<ul style="list-style-type: none"> Proportion of vacant / derelict sites 	The majority of the cluster sites are identified as vacant or derelict	Over a third of the cluster sites are identified as vacant or derelict	More than a tenth of the cluster sites are identified as vacant or derelict	Some of the cluster sites are identified as vacant or derelict	There are no vacant or derelict sites identified within the cluster
<ul style="list-style-type: none"> Strategic mix and distribution of sites 	The LA has a very weak policy of ensuring a strategic mix and distribution of employment clusters	The LA has a weak policy of ensuring a strategic mix and distribution of employment clusters	The LA has a neutral policy of ensuring a strategic mix and distribution of employment clusters	The LA has a strong policy of ensuring a strategic mix and distribution of employment clusters	The LA has a very strong policy of ensuring a strategic mix and distribution of employment clusters
<ul style="list-style-type: none"> Strategic reallocation of site usage 	A significant amount of work has been undertaken by the LA or other Government stakeholders on the redevelopment of the cluster for an alternative use	Some work has been undertaken by the LA or other Government stakeholders on the redevelopment of the cluster for an alternative use	No work has been undertaken by the LA or other Government stakeholders on the redevelopment or renewal of the cluster	Some work has been undertaken by the LA or other Government stakeholders on the renewal of the cluster for the retention of employment uses	A significant amount of work has been undertaken by the LA or other Government stakeholders on the renewal of the cluster for the retention of employment uses
Group 2 – Physical arrangement, access and quality					
<ul style="list-style-type: none"> Overall cluster area and floorspace 	Net cluster area is less than 0.5ha	Net cluster area is between 0.5 and 2ha	Net cluster area is between 2 and 5ha	Net cluster area is between 5 and 10ha	Net cluster area is greater than 10ha
<ul style="list-style-type: none"> Age and quality of buildings 	The existing cluster buildings are of very poor quality and age	The existing cluster buildings are of poor quality and age	The existing cluster buildings are of reasonable quality and age	The existing cluster buildings are of good quality and age	The existing cluster buildings are of very good quality and age

Assessment criteria	Impact levels				
	1 – Strongly negatives	2 – Negative	3 – Neutral	4 – Positive	5 – Strongly positive
<ul style="list-style-type: none"> • Quality of public realm 	The existing public realm within the cluster is of very poor quality	The existing public realm within the cluster is of poor quality	The existing public realm within the cluster is of reasonable quality	The existing public realm within the cluster is of good quality	The existing public realm within the cluster is of very good quality
<ul style="list-style-type: none"> • Provision of drainage, lighting and security 	The existing cluster drainage, lighting and security are of very poor quality	The existing cluster drainage, lighting and security are of poor quality	The existing cluster drainage, lighting and security are of reasonable quality	The existing cluster drainage, lighting and security are of good quality	The existing cluster drainage, lighting and security are of very good quality
<ul style="list-style-type: none"> • Quality of parking and internal circulation 	There is very limited cluster parking and very poor internal circulation	There is limited cluster parking and poor internal circulation	There is reasonable cluster parking and reasonable internal circulation	There is a good amount of cluster parking and good internal circulation	There is very good amount of cluster parking and very good internal circulation
<ul style="list-style-type: none"> • Operation of potentially contaminative uses 	The cluster employment operations are very likely to include contaminative uses	The cluster employment operations are likely to include contaminative used	The potential for contaminative uses is unknown within the cluster employment operations	The cluster employment operations are unlikely to include contaminative uses	The cluster employment operation are very unlikely to include contaminative uses

Group 3 – Transport access and supporting infrastructure

<ul style="list-style-type: none"> • Connections to highway network 	The cluster has very poor connections to the highway network	The cluster has poor connections to the highway network	The cluster has reasonable connections to the highway network	The cluster has good connections to the highway network	The cluster is very good connections to the highway network
<ul style="list-style-type: none"> • General public transport accessibility 	The cluster has a very low PTAL	The cluster has a low PTAL	The cluster has mid range PTAL	The cluster has a high PTAL	The cluster has a very high PTAL
<ul style="list-style-type: none"> • Distance to local railway station 	The cluster is at least a 25min walk to the nearest railway station	The cluster is about a 20min walk to the nearest railway station	The cluster is about a 15min walk to the nearest railway station	The cluster is about a 10min walk to the nearest railway station	The cluster is generally within a 5min walk to the nearest railway station

Assessment criteria	Impact levels				
	1 – Strongly negatives	2 – Negative	3 – Neutral	4 – Positive	5 – Strongly positive
<ul style="list-style-type: none"> Distance to local shops and services 	The cluster is at least a 25min walk to the nearest shops and services	The cluster is about a 20min walk to the nearest shops and services	The cluster is about a 15min walk to the nearest shops and services	The cluster is about a 10min walk to the nearest shops and services	The cluster is generally within a 5min walk to the nearest shops and services

Group 4 – Buffer areas and sensitive receptors

<ul style="list-style-type: none"> Distance to residential receptors 	The cluster is immediately adjacent to and largely surrounded by residential receptors	The cluster is adjacent to residential receptors on some sides	The cluster is near but not adjacent to residential receptors but there is only limited buffering	The cluster is near some residential receptors and there is significant buffering	The cluster is not close to any residential receptors
<ul style="list-style-type: none"> Distance to natural receptors 	The cluster is immediately adjacent to and largely surrounded by natural receptors	The cluster is adjacent to natural receptors on some sides	The cluster is near but not adjacent to natural receptors but there is only limited buffering	The cluster is near some natural receptors and there is significant buffering	The cluster is not close to any natural receptors
<ul style="list-style-type: none"> Distance to surface water receptors 	The cluster is immediately adjacent to and largely surrounded by surface water receptors	The cluster is adjacent to surface water receptors on some sides	The cluster is near but not adjacent to surface water receptors but there is only limited buffering	The cluster is near some surface water receptors and there is significant buffering	The cluster is not close to any surface water receptors
<ul style="list-style-type: none"> Interaction / conflicts between cluster and surrounding uses 	There is significant negative interactions between the cluster and its surrounding uses	There are some negative interactions between the cluster and its surrounding uses	There are no negative or positive interactions between the cluster and its surrounding uses	There are positive interactions between the cluster and its surrounding uses	There are significant positive interactions between the cluster and its surrounding uses

Assessment criteria	Impact levels				
	1 – Strongly negatives	2 – Negative	3 – Neutral	4 – Positive	5 – Strongly positive
Group 5 – Policy considerations					
<ul style="list-style-type: none"> Linkages with existing regeneration policies, programmes and projects 	The continued employment use of the cluster has a very low potential to enhance existing local regeneration policies, programmes and projects	The continued employment use of the cluster has a low potential to enhance existing local regeneration policies, programmes and projects	The continued employment use of the cluster will have not impact on the potential of local regeneration policies, programmes and projects	The continued employment use of the cluster has a high potential to enhance existing local regeneration policies, programmes and projects	The continued employment use of the cluster has a very high potential to enhance existing local regeneration policies, programmes and projects
<ul style="list-style-type: none"> Current local employment issues and deprivation levels 	The cluster is located in an area of very low social and economic deprivation	The cluster is located in an area of low social and economic deprivation	The cluster is located in an area or intermediate social and economic deprivation	The cluster is located in an area of high social and economic deprivation	The cluster is located in an area of very high social and economic deprivation
<ul style="list-style-type: none"> Potential to assist in the achievement of economic development targets 	The continued employment use of the cluster has a very low potential of achieve economic development targets	The continued employment use of the cluster has a low potential of achieve economic development targets	The continued employment use of the cluster has a reasonable potential of achieve economic development targets	The continued employment use of the cluster has a high potential of achieve economic development targets	The continued employment use of the cluster has a very high potential of achieve economic development targets

Source: Halcrow



Appendix B Cluster MCA appraisals

Borough	Cluster Identifier	Cluster Name	Number of Sites	Net Employment Area (ha)	Group 1 - Strategic Issues			Group 2 - Physical arrangement, access and quality					Group 3 - Transport Access and Supporting Infrastructure				Group 4 - Buffer Areas and Sensitive Receptors				Group 5 - Policy Consideration				Total Score	Assessment Ranking															
					Proportion of vacant / derelict sites	Strategic mix and distribution of sites	Strategic reallocation of site usage	Overall cluster area and floorspace	Age and quality of buildings	Quality of public realm	Provision of drainage, lighting and security	Quality of parking and internal circulation	Operation of potentially contaminative uses	Connections to highway network	General public transport accessibility	Distance to local railway station	Distance to local shops and services	Distance to residential receptors	Distance to natural receptors	Distance to surface water receptors	Use of buffers between sources and receptors	Linkages with existing regeneration policies, programmes and projects	Currently local employment issues and deprivation levels	Potential to assist in the achievement of economic development targets																	
					Total	Weighting	Score	Total	Weighting	Score	Total	Weighting	Score	Total	Weighting	Score	Total	Weighting	Score	Total	Weighting	Score	Total	Weighting	Score																
Enfield	EN001	Chase Side Works	7	0.9	4	4	3	3.7	35	128.3	2	2	2	2	2	3	2.2	25	54.2	1	3	3	3	2.5	15	37.5	1	4	4	1	2.5	15	37.5	2	1	1	1.3	10	13.3	270.8	23
Enfield	EN003	Regents Avenue	9	1.8	4	4	2	3.3	35	116.7	2	3	3	3	2	3	2.7	25	66.7	4	4	3	4	3.8	15	56.3	1	4	1	1	1.8	15	26.3	1	3	3	2.3	10	23.3	289.2	22
Enfield	EN004	Oakhorpe Dairy	1	3.1	4	4	3	3.7	35	128.3	3	4	4	4	4	3	3.7	25	91.7	4	2	2	2	2.5	15	37.5	1	1	1	1	1.0	15	15.0	3	3	3	3.0	10	30.0	302.5	21
Enfield	EN005	New Southgate Industrial Estate	16	1.7	4	4	2	3.3	35	116.7	2	3	3	3	4	3	3.0	25	75.0	4	4	4	4	4.0	15	60.0	3	4	1	1	2.3	15	33.8	3	5	3	3.7	10	36.7	322.1	16
Enfield	EN006	Redburn Trading Estate	30	3.8	3	4	3	3.3	35	116.7	3	4	4	4	4	3	3.7	25	91.7	4	3	4	1	3.0	15	45.0	4	2	1	2	2.3	15	33.8	5	4	3	4.0	10	40.0	327.1	13
Enfield	EN007	Queensway	33	3.4	4	4	2	3.3	35	116.7	3	2	2	2	2	3	2.3	25	58.3	2	3	4	4	3.3	15	48.8	3	4	4	3	3.5	15	52.5	3	4	3	3.3	10	33.3	309.6	19
Enfield	EN008	Lea Valley Trading Estate	61	17.1	4	4	3	3.7	35	128.3	5	4	4	4	4	3	4.0	25	100.0	5	2	2	2	2.8	15	41.3	4	4	1	3	3.0	15	45.0	5	5	3	4.3	10	43.3	357.9	1
Enfield	EN009 / EN014 / EN026	Meridian Way Land / Glover Drive / Kimberly Road	7	23.2	2	4	4	3.3	35	116.7	5	3	3	3	3	3	3.3	25	83.3	5	2	3	3	3.3	15	48.8	4	4	2	3	3.3	15	48.8	4	5	5	4.7	10	46.7	344.2	7
Enfield	EN010	Montagu Industrial Estate / Kenninghall Estate / Railtrack Land	62	13.8	3	4	4	3.7	35	128.3	5	3	3	3	3	2	3.2	25	79.2	5	2	4	2	3.3	15	48.8	3	3	3	1	2.5	15	37.5	3	5	5	4.3	10	43.3	337.1	10
Enfield	EN011	Claverings Industrial Estate / Dominion Business Park / Horizon Business Centre	33	2.7	4	4	3	3.7	35	128.3	3	3	3	3	3	3	3.0	25	75.0	4	3	2	2	2.8	15	41.3	2	4	4	2	3.0	15	45.0	2	4	2	2.7	10	26.7	316.3	18
Enfield	EN012	Laghedge Lane Industrial Estate	7	0.7	4	4	2	3.3	35	116.7	2	3	3	3	2	3	2.7	25	66.7	3	3	3	3	3.0	15	45.0	2	4	4	3	3.3	15	48.8	2	4	2	2.7	10	26.7	303.8	20
Enfield	EN013	Commercial Road and North Middlesex Estate	56	9.2	4	4	3	3.7	35	128.3	4	3	3	3	2	3	3.0	25	75.0	3	2	3	3	2.8	15	41.3	2	3	4	3	3.0	15	45.0	3	4	3	3.3	10	33.3	322.9	15
Enfield	EN015	Eley's Estate	77	24.5	3	4	3	3.3	35	116.7	5	3	3	3	2	3	3.2	25	79.2	5	2	4	2	3.3	15	48.8	4	4	4	3	3.8	15	56.3	5	5	3	4.3	10	43.3	344.2	8
Enfield	EN016	Innova Park	11	35.7	2	4	2	2.7	35	93.3	5	4	4	4	3	4	4.0	25	100.0	5	2	3	3	3.0	15	45.0	3	3	4	4	3.5	15	52.5	5	3	3	3.7	10	36.7	327.5	12
Enfield	EN017	Hertford Road / Mollison Avenue	2	10.9	2	4	3	3.0	35	105.0	5	3	4	4	4	3	3.8	25	95.8	5	3	4	3	3.8	15	56.3	2	4	4	3	3.3	15	48.8	5	3	3	3.7	10	36.7	342.5	9
Enfield	EN018	Meridian Business Park	17	18.9	2	4	2	2.7	35	93.3	5	3	3	3	3	3	3.3	25	83.3	5	2	4	2	3.3	15	48.8	4	4	3	3	3.5	15	52.5	5	4	3	4.0	10	40.0	317.9	17
Enfield	EN019	Aztec 406 Development Site	6	19.3	3	4	3	3.3	35	116.7	5	4	4	4	4	3	4.0	25	100.0	5	2	2	2	2.8	15	41.3	4	4	3	3	3.5	15	52.5	5	5	3	4.3	10	43.3	353.8	3
Enfield	EN020	Brimsdown Industrial Area	243	115.1	4	4	3	3.7	35	128.3	5	4	3	3	3	3	3.5	25	87.5	5	2	3	3	3.3	15	48.8	4	4	3	3	3.5	15	52.5	5	4	3	4.0	10	40.0	357.1	2
Enfield	EN021	Great Cambridge Industrial Estate	26	11	3	4	3	3.3	35	116.7	5	3	3	3	3	3	3.3	25	83.3	5	3	3	3	3.3	15	52.5	3	4	4	2	3.3	15	48.8	4	3	3	3.3	10	33.3	334.6	11
Enfield	EN022	Great Cambridge Road (Martinbridge Trading Estate)	15	7	4	4	3	3.7	35	128.3	4	3	3	3	3	3	3.2	25	79.2	5	4	3	3	3.8	15	56.3	3	4	4	2	3.3	15	48.8	4	3	3	3.3	10	33.3	345.8	4
Enfield	EN023	Great Cambridge Road	9	7.1	4	4	3	3.7	35	128.3	4	3	3	3	3	3	3.2	25	79.2	4	4	5	3	4.0	15	60.0	2	4	4	2	3.0	15	45.0	3	4	3	3.3	10	33.3	345.8	5
Enfield	EN024	Great Cambridge Road	59	23.4	3	4	3	3.3	35	116.7	5	3	3	3	3	3	3.3	25	83.3	4	4	4	4	4.0	15	60.0	4	3	4	3	3.5	15	52.5	3	4	3	3.3	10	33.3	345.8	6
Enfield	EN025	Alma Industrial Estate	20	4.6	4	4	3	3.7	35	128.3	3	3	3	3	3	3	3.0	25	75.0	4	3	3	3	3.3	15	48.8	2	2	3	2.5	15	37.5	4	4	3	3.7	10	36.7	326.3	14	



Halcrow Group Limited

Vinyard House, 44 Brook Green, Hammersmith, London W6 7BY
tel +44 (0) 20 7602 7282 fax +44 (0) 20 7603 0095 web www.halcrow.com

