

Analysis of plot ratios in industrial development in London (2011-2018)

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The Mayor's draft London Plan addresses the need to retain sufficient industrial, logistics and related capacity by seeking, as a general principle, no overall net loss of industrial floorspace capacity across London in designated industrial locations. Floorspace capacity is defined as either the existing industrial and warehousing floorspace on site or the potential industrial and warehousing floorspace that could be accommodated on site at a 65% plot ratio (whichever is the greater)¹.

The plot ratio figure of 65% was sourced from the London Employment Sites Database (LESD)² which was based on an assessment of data from the London Development Database on new build industrial developments over the period 2004 – 2015 where non-residential site areas were available.

To inform the London Plan Examination in Public, this paper provides additional analysis of plot ratios³ in all planning approvals for industrial-only development and for residential / industrial 'co-located' development in London over the period 1 April 2011 to 28 February 2018. All data in this paper has been sourced from the London Development Database (LDD)⁴.

1. Industrial-only development

Tables 1a to 1d analyse industrial plot ratios⁵ from proposed developments that contained industrial floorspace only. Proposed developments that included residential or non-industrial floorspace are excluded from the analysis in these tables.

Table 1a shows that from a total of 255 schemes, the mean average industrial plot ratio was 86% and the median average industrial plot ratio was 71%. Just over half of all schemes resulted in industrial plot ratios equivalent to 65% or greater.

The data suggests that average industrial plot ratios (mean and median measures) are typically higher for B8 storage and distribution floorspace compared to B2 general industrial floorspace.

Table 1b shows that average industrial plot ratios (mean and median measures) are typically higher in inner London compared to outer London⁶. The median average industrial plot ratio in outer London is recorded at 65%, compared to 97% in inner London. This is broadly consistent with the findings in the LESD which recorded median average plot ratios for B8 floorspace of 65% for outer London and 100% for inner London⁷.

Tables 1c and 1d provide a breakdown of the inner and outer London totals by industrial use class. As for the London-wide data the table shows that average plot ratios (mean and median measures) are typically higher for B8 floorspace compared to B2 general industrial floorspace.

¹ Mayor of London, Draft London Plan (2017), paragraph 6.4.5

² CAG Consulting, London Employment Sites Database, GLA 2017

³ Plot ratios provide a measure of the ratio of built floorspace to site area.

⁴ The data was extracted from the London Development Database (LDD) in May 2018 and is subject to change. Data for the 2017/18 financial year was still being finalised at the time the data was extracted.

⁵ Industrial plot ratios are calculated as follows: Proposed industrial floorspace divided by the total non-residential site area, multiplied by 100%. For industrial-only developments, the 'Total non-residential site area' is the same as the 'Total site area'.

⁶ See Appendix for borough-based definitions of inner and outer London

⁷ CAG Consulting, 2017 op cit, Table 3.4

Tables 1a – 1d: Plot ratios in industrial-only development schemes (based on proposed floorspace in all planning approvals) 1/4/2011 to 28/2/2018

Table 1a London industrial plot ratios, by industrial use class⁸

	No. of schemes	Average Industrial Plot Ratio (Mean)	Average Industrial Plot Ratio (Median)	% of industrial schemes with a proposed industrial plot ratio of 65% or greater
B1c only	19	103%	67%	53%
B2 only	59	79%	65%	51%
B8 only	125	93%	93%	66%
Mixed B1c/B2/B8	52	74%	54%	31%
All industrial	255	86%	71%	55%

Table 1b: Inner* and Outer London* industrial plot ratios

	No. of schemes	Average Industrial Plot Ratio (Mean)	Average Industrial Plot Ratio (Median)	% of industrial schemes with a proposed industrial plot ratio of 65% or greater
Inner London	53	100%	97%	66%
Outer London	202	83%	65%	51%
London	255	86%	71%	55%

Table 1c: Inner* London industrial plot ratios, by industrial use class

	No. of schemes	Average Industrial Plot Ratio (Mean)	Average Industrial Plot Ratio (Median)	% of industrial schemes with a proposed industrial plot ratio of 65% or greater
B1c only	4	131%	108%	75%
B2 only	4	79%	67%	50%
B8 only	39	106%	100%	74%
Mixed B1c/B2/B8	6	50%	42%	17%
All industrial	53	100%	97%	66%

Table 1d: Outer* London industrial plot ratios, by industrial use class

	No. of schemes	Average Industrial Plot Ratio (Mean)	Average Industrial Plot Ratio (Median)	% of industrial schemes with a proposed industrial plot ratio of 65% or greater
B1c only	15	95%	58%	47%
B2 only	55	78%	65%	51%
B8 only	86	87%	90%	63%
Mixed B1c/B2/B8	46	77%	56%	33%
All industrial	202	83%	65%	51%

* See Appendix for borough-based definitions of inner and outer London

⁸ B1c = Light industrial; B2 = General industrial; B8 = Storage and distribution uses

2. Residential and industrial (only) ‘co-located’ development

Table 2 presents industrial plot ratios from proposed developments for new residential and industrial floorspace on the same site. The plot ratios are calculated on the proposed industrial floorspace as a percentage of the total non-residential site area. Developments with other types of non-residential uses are excluded. All schemes analysed comprised residential and light industrial (B1c) floorspace.

Based upon the 13 schemes for which data is available, the mean average industrial plot ratio was 201% and the median average industrial plot ratio was 203%. The data suggests that on co-located residential and industrial schemes there may be a tendency to provide higher plot ratios for industrial uses compared to industrial-only schemes. All 13 schemes resulted in an industrial plot ratio of 65% or greater.

Table 2: Industrial plot ratios in residential and industrial co-location schemes (based on proposed floorspace in all planning approvals) 1/4/2011 to 28/2/2018

	No. of schemes	Average Industrial Plot Ratio (Mean)	Average Industrial Plot Ratio (Median)	% of industrial/residential schemes with a proposed industrial plot ratio of 65% or greater
Inner London	9	204%	233%	100%
Outer London	4	196%	128%	100%
London	13	201%	203%	100%

3. Residential, industrial and non-industrial ‘co-located’ development

Table 3 analyses *non-residential* plot ratios from proposed developments for new residential, industrial and non-industrial floorspace on the same site. The plot ratios presented are for the non-residential uses⁹.

The data suggests that for London as a whole, average non-residential plot ratios in mixed industrial, non-industrial and residential schemes exceed 200% (mean and median measures). Inner London non-residential plot ratios are typically higher than those for outer London. Of the 41 schemes, 90% resulted in non-residential plot ratios of 65% or greater.

⁹ In LDD, it is not possible to separate out the non-residential site area into its industrial and non-industrial components.

Table 3: *Non-residential* plot ratios in mixed industrial, non-industrial and residential co-location schemes (based on proposed floorspace in all planning approvals) 1/4/2011 to 28/2/2018

	No. of schemes	Average <i>Non-residential</i> Plot Ratio (Mean)	Average <i>Non-residential</i> Plot Ratio (Median)	% of industrial/non-industrial/residential schemes with a proposed <i>non-residential</i> plot ratio of 65% or greater
Inner London	32	293%	267%	91%
Outer London	9	188%	92%	89%
London	41	270%	213%	90%

APPENDIX: Inner and Outer London Boroughs

Inner London	Outer London
City of London	Barking & Dagenham
Camden	Barnet
Greenwich	Bexley
Hackney	Brent
Hammersmith & Fulham	Bromley
Islington	Croydon
Kensington & Chelsea	Ealing
Lambeth	Enfield
Lewisham	Haringey
Newham	Harrow
Southwark	Havering
Tower Hamlets	Hillingdon
Wandsworth	Hounslow
Westminster	Kingston
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Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız veya adrese başvurunuz.

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں چاہتے ہیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

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