

Charlton Riverside Employment & Heritage Study

JANUARY 2017

**Charlton Riverside Employment &
Heritage Study**

Web version
01-02-2017

Copyright

We Made That
James Hulme
January 2017

Published by

Royal Borough of Greenwich
The Woolwich Centre
Wellington Street
Woolwich
SE18 6HQ

Supported by

Greater London Authority
City Hall
The Queen's Walk
More London
London SE1 2AA

Contact

Enquiries 020 8854 8888

Website

<http://www.royalgreenwich.gov.uk>

All photographs courtesy of Philipp Ebeling
for We Made That unless otherwise stated.

Unless otherwise indicated, the data for
this study is based on field and desk survey
work undertaken by We Made That, James
Hulme and the Royal Borough of Greenwich
in late 2016.

© Crown Copyright and database right 2014.

Charlton Riverside has long been a site of production and employment, supporting an historic industrial hub and now serving the needs of a growing capital city.

Today the area continues to support clusters of industrial, creative and retail activity and employment in London. This study takes a closer look at the type of businesses, buildings and jobs that make Charlton Riverside a productive place.

Contents

1	Charlton Riverside	6
1.1	Introduction	8
1.2	Policy context	8
1.3	Study site	8
1.4	Charlton Riverside today: industrial context	9
1.5	Current industrial trends in London	9
2	Employment in Charlton Riverside	14
2.1	Business & employment overview	14
2.1	Employment mapping	16
2.1.1	Employment activities	16
2.1.2	Building types	26
2.1.3	Employment density	30
2.2	Study sites: sub-areas	38
2.2.1	Site 1: Wharves	40
2.2.2	Site 2: Bugsby's Way	42
2.2.3	Site 3: Stonelake, Ropery & Penhall	44
2.2.4	Site 4: Mellish & Westminster	46
2.2.5	Detailed interview analysis	48
3	Heritage in Charlton Riverside	54
3.1	Policy context & protection measures	56
3.3	Historic asset overview	56
3.4	Detailed appraisal	60
3.1	Detailed appraisal	60
3.1.1	Summary of Significance	63
3.1.2	Character area 1: Bowater Road	63
3.1.2	Character area 2: Riverside	74
3.1.3	Character area 3: Steam Factory	82
3.1.4	Other heritage features	86
3.1.5	Charlton vernacular	100
4.	Conclusions and Recommendations	106
4.1	Employment recommendations	108
4.2	Heritage recommendations	112



1.

Charlton Riverside

Introduction

The Charlton Riverside employment activities and heritage scoping study aims to provide detailed and up-to-date information on the local economy in Charlton Riverside and a detailed analysis of the heritage assets in the area. The study will complement and inform the development of the emerging Charlton Riverside Supplementary Planning Document (SPD).

This study is comprised of two inter-related streams of inquiry: employment and heritage. The employment activities study aims to reveal and make sense of the Charlton Riverside economy by recording all job generating uses (retail, office, industrial, health and education and other social/civic uses). The heritage scoping study aims to deliver a finer grain understanding of the historic architectural character and morphology of the area, particularly in reference to its long history as an employment hub.

Together, this study will inform strategies for intensification and growth and support sustainable regeneration as well as reveal how opportunities and constraints related to heritage might influence the emerging SPD.

Policy Context

Charlton Riverside is an Opportunity Area in the London Plan identified for mixed-use development and with significant capacity for jobs and new homes. RB Greenwich wish to retain the area as a significant employment location and a large component of the SPD will be the intensification and rationalisation of the current employment areas in Charlton Riverside.

The borough also wishes to take full audit of the heritage assets and historic developments that have shaped Charlton Riverside and which might inform the future character and morphology of the wider area.

Study Site

The employment and heritage study area lies on the south bank of the Thames with just over a mile's length of riverfront, at a point east of the Greenwich Peninsula where the river straightens from its double curve around the peninsula into a straight channel known as Woolwich Reach.

The site contains several significant local landmarks, and in the Thames Barrier an engineering structure of regional (and national) significance. Other landscape feature of amenity value on site is the riverside walking/cycling path by the Thames itself, which runs uninterrupted to the Barrier before being diverted inland for a short distance.

The area is largely defined, today, by industrial and "out of town" retail uses. The ballast wharves (Angerstein and Murphy's) dominate the western side. This very heavily trafficked and busy part of the site is adjacent to a relatively recent arterial road (dating from the 1980s) that forms a direct link from the Blackwall Tunnel to Woolwich and the A2.

Along Bugsby's Way, the predominant use is out of town style retail; large car parks serving each store largely define the urban landscape. East of Anchor & Hope Lane the site is almost exclusively industrial usage. A small group of houses on Anchor & Hope

lane remains as a legacy of former industrial employment (see below).

The eastern end of the site contains its most significant architectural heritage. Now named the Westminster Trading Estate, a group of late 19th and early 20th century buildings represents the legacy of one of the area's biggest former industries and employers, the Siemens Telegraph Cable Works. This area forms the focus of the latter part of the heritage study due to the extent of surviving assets.

Charlton Riverside today: industrial context

In 2015, RB Greenwich was the site of around 3.3% of London's total industrial land. The borough is host to around 244ha of designated industrial land, with a vacancy

rate of 7.7%, which falls in line with London average (7.8%). From 2001-2010, the borough has seen the release of a significant proportion of its designated industrial land, although release in the last five years has been moderate in comparison with this earlier period.

Charlton Riverside itself is a predominantly industrial area, with considerable sites of Strategic Industrial Location (SIL) designation. The area comprises a mix of industrial and warehousing uses, including three active safeguarded wharves. 2010¹ industrial land mapping of the area highlighted a number of non-industrial sites, principally in retail or trade counter use, are recorded as lying within the SIL boundary.

1

AECOM (URS), 2010 Industrial Land Baseline Study

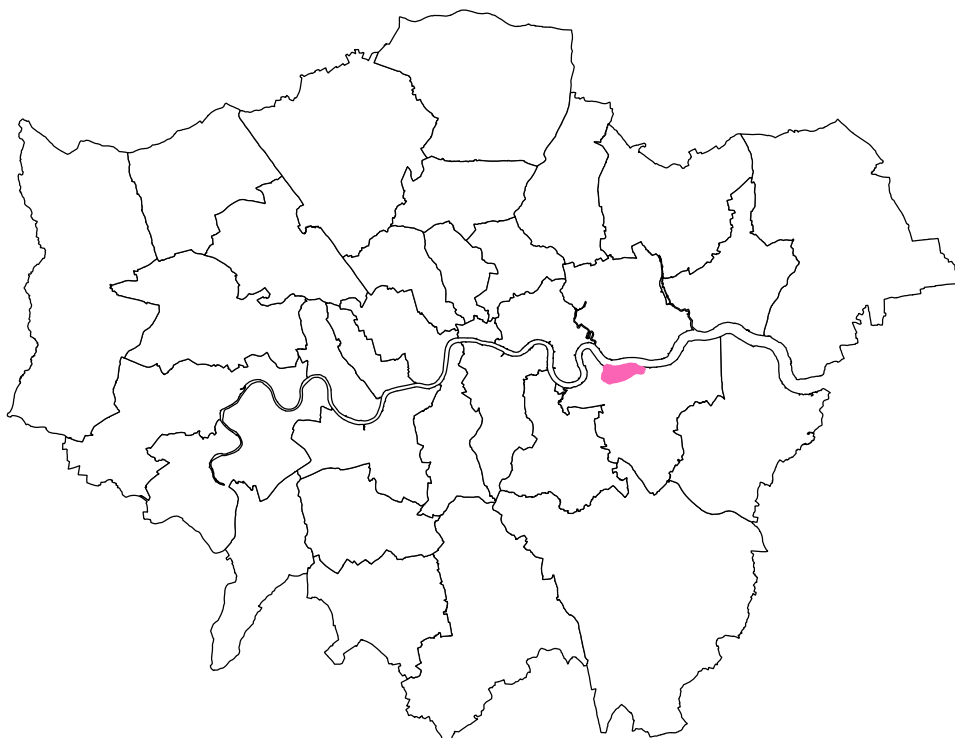


Fig 1. Location of study sites in RB of Greenwich within Greater London.

In 2013 the boundary of the SIL was revised following an appraisal of the capacity of the SIL undertaken in the 2012 Employment Land Study. This revision sought to exclude non-industrial occupiers and release land occupied by low value uses or subject to poor access and servicing. The remaining SIL area is focused on protecting land in-use by the three operational safeguarded wharves, with the exclave portion of the SIL lying to the east of Eastmoor Street / Unity Way being expanded to include better quality previously non-designated adjacent industrial sites.

The intention of this process of re-definition of industrial land designations has been to introduce non-industrial uses in a more orderly process than previously as to not undermine the functionality of the remaining well-used sites, despite the overall reduction in capacity the area has experienced.

Current industrial trends in London

With the release of industrial land at a rate almost three times that of the Supplementary Planning Guidance (SPG) target rate of release, London is currently experiencing a tightening of its industrial employment capacities.

London has seen an increase in employment densities on industrial land over the past five years, potentially suggesting intensification of use and changing patterns of manufacturing production processes. Crucially, there are a number of industrial activities directly serving London’s population, including logistics and retail warehousing, printers, food manufacturing and specialist equipment hire, which are dependant on sites proximate to the city.

Manufacturing continues to evolve; London’s industrial land illustrates the growth of industrial/manufacturing niches, including artisanal manufacturing, the production of luxury goods, and smaller food drink manufacturers.

Clusters of industrial land across the city are the sites of an emerging pattern of sectors that are sensitive to their (central) London location. These business rely on access to a skilled workforce, established London industries (e.g. fashion) and other creative sector/design links within central London.

London’s industrial property has been one of the strongest performing sectors of the UK property market, in terms of rental growth and total returns, whether on short, medium or long term basis². A key contributor has been diminishing level of supply. Property trends have also suggested growth in shared amenities/workspace, with businesses (both industrial and office-based) showing increasing willingness to take up shared workspace, facilities and servicing.

Industrial occupier take-up in 2015 in London was 5.6 million sqft (over 500,000sqm), moderately below the five-year annual average³. London has also seen an increasing demand for modern uses for industrial space from catering to digital business to trade counter uses, all of which continue to shape the form and function of London’s industrial land stock.

Key

 **Strategic Industrial Location (SIL)**

2 Lambert Smith Hampton, 2016. Industrial and Logistics Market 2016: Tracking Developments
3 ibid.



Fig 2. Study-wide boundary and industrial land designations in 2010.



Fig 3. Study-wide boundary and industrial land designations in 2015.



2.

Employment in Charlton Riverside

Business and employment overview

Overall, the Charlton Riverside study site is well-occupied and dense site of employment. This site is home to almost 350 businesses, which together provide around 5,600 jobs.

At 94 employees/ha, Charlton Riverside presents a dense site of employment, particularly in relation to densities for industrial land across London which averages at 69 employees/ha. This higher density figure reflects both the infiltration of retail and amenity uses onto the western edge of site, as well as the continued employment opportunities accommodated by dense industrial-type uses in the centre of the site. The strong concentration of artist and small business studios clustered on the eastern edge of the site further contributes to this density.

Key sectors in terms of employment are retail and manufacturing, which provide 19% and 14% of total jobs on site respectively. These sectors are followed by services (13%), construction (12%) and arts & culture (10%) which also contribute substantially as employment providers in the area. While both retail and services are more traditional sources of denser employment sites, the high proportion of jobs in both construction-related sectors and arts and culture reflect two distinct specialisms of the Charlton Riverside area.

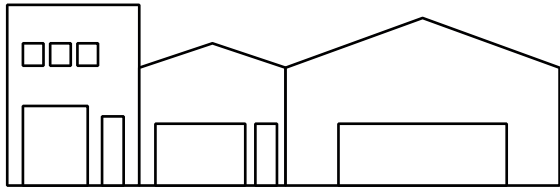
In terms of the distribution of businesses site-wide, manufacturing (18%), vehicle repair and maintenance activities (13%) and services (13%) are most concentrated, in combination accounting for almost half of the total number of businesses on site.

Construction activities also account for a fair share of the distribution of businesses, but these are less prominent at 9%.

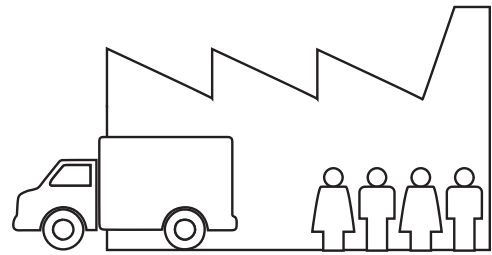
Construction-related activities are also the most dominant in terms of premises size and space-hungry operations. Construction activities occupy 29% of the study area's floorspace, with retail (12%), services (10%) and manufacturing (10%) following. This figure is largely swayed by the large production activities ongoing on the wharf sites in the study area, including cement and aggregate processing and production. These are by nature land-hungry activities which require outdoor yard space, 24/7 delivery and servicing access and large land parcels for raw processing activities.

In late 2016, Charlton Riverside is the site of very low vacancy, with available floorspace only totalling 2.5% - well below the London-wide guideline frictional vacancy rate of 5%. This figure can be understood as a signal of the strong strategic location of the site as a place for London-serving industry, as well as indicative of the lower levels of investment into refurbishment or development of industrial premises given the future uncertainties over planning ambitions for the site.

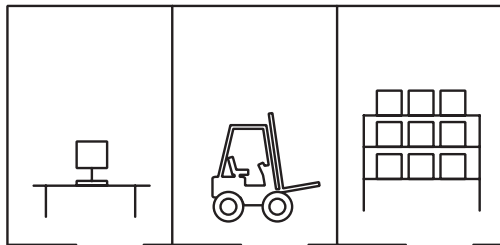
Quality of premises and sites vary across the study area, with most industrial premises constructed post-1945 but little evidence of investment into new industrial premises. Speculative development is largely limited to retail and leisure uses. The character and quality of each sub-area is informed not only by the building stock it contains, but also by the activities accommodated and their related access and servicing needs.



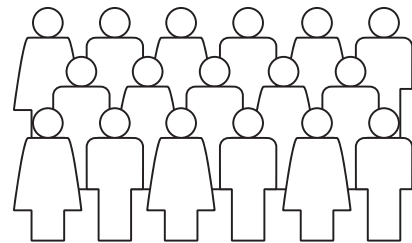
348 businesses



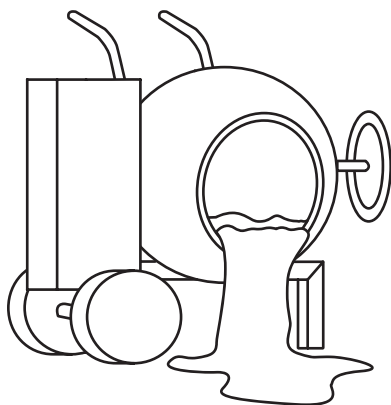
5,600 jobs



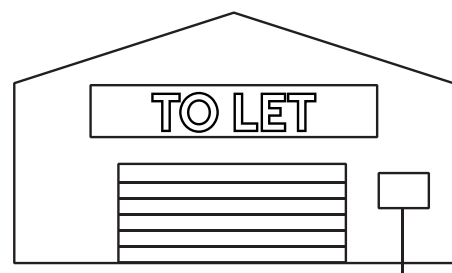
600,000 sqm
employment space



94 employees
per hectare



3.7m tonnes of concrete &
aggregate produced annually



2.5% floorspace
vacancy

Business activity

Figures 5, 6 & 7 show the breakdown of total businesses, employment and floorspace by business activity. Figure 14 on page 28 maps out these same activity sectors across the study area.

The top activity sector in terms of spatial prevalence is construction, accounting for 25% of total employment floorspace. It is followed by retail and manufacturing, which respectively account for 12% and 10% of total employment.

Retail accounts for the largest proportion of overall employment across the site, with 19% of total employment on site. The manufacturing industry is the second largest employer across the Charlton riverside site with 14% of total employment. Other important employment sectors that make up the Charlton Riverside area are services, construction, and arts and culture, with respectively 13%, 12% and 10% of total employment. Figure 14 on page 28 identifies clustering of buildings ‘In Multiple Occupation’, the majority of which fall within the arts and culture sector, but also encompass small manufacturing businesses.

The relationship between share of total businesses, employment and floorspace in the construction industry highlights the particular space hungry nature of the construction businesses on site; construction accounts for 9% of total businesses and 25% of total floorspace. around them.

Manufacturing overall shows a more constant distribution across its share of businesses, employment and floorspace.

The manufacturing industry accounts for 18% of total businesses on site, 14% of total employment and 10% of floorspace.

Figures 8-12 on the following pages offer further analysis of the site’s key activity sectors: manufacturing, retail, construction & services.



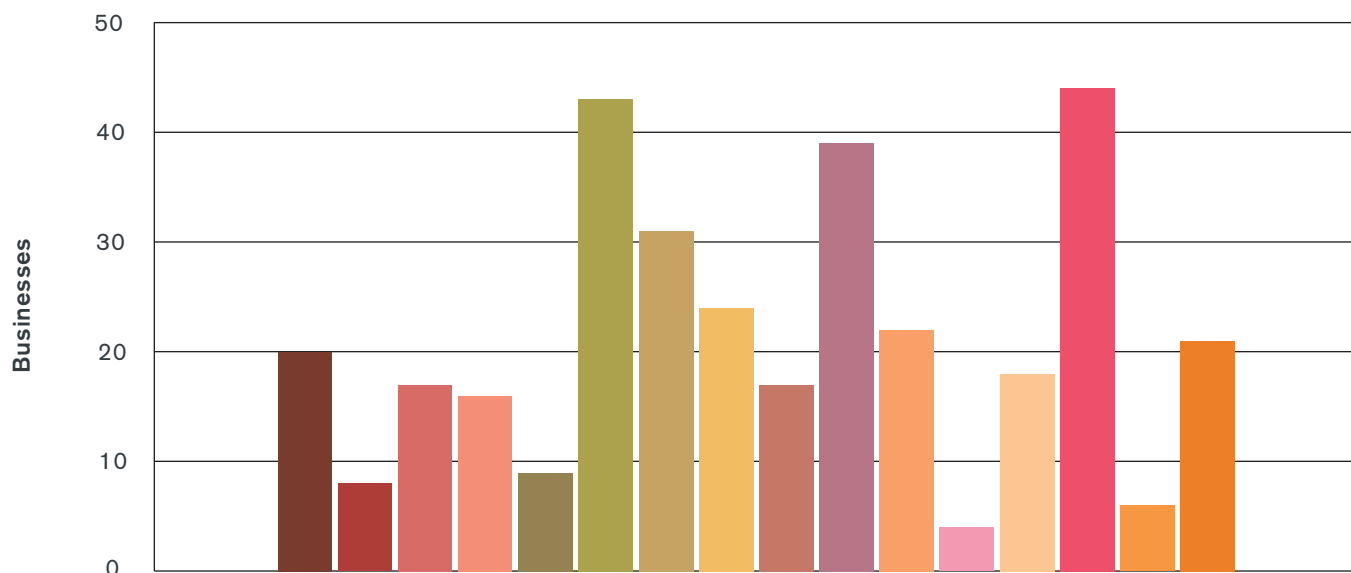


Fig 4. Distribution of total businesses by business activity

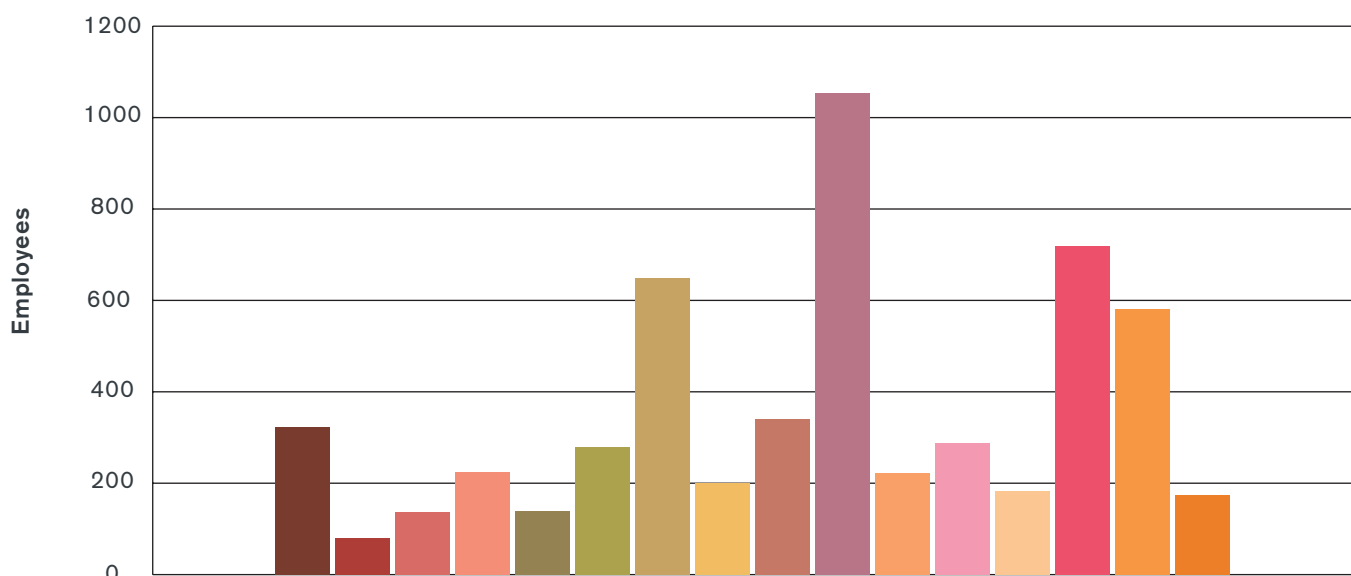


Fig 5. Distribution of total employment by business activity

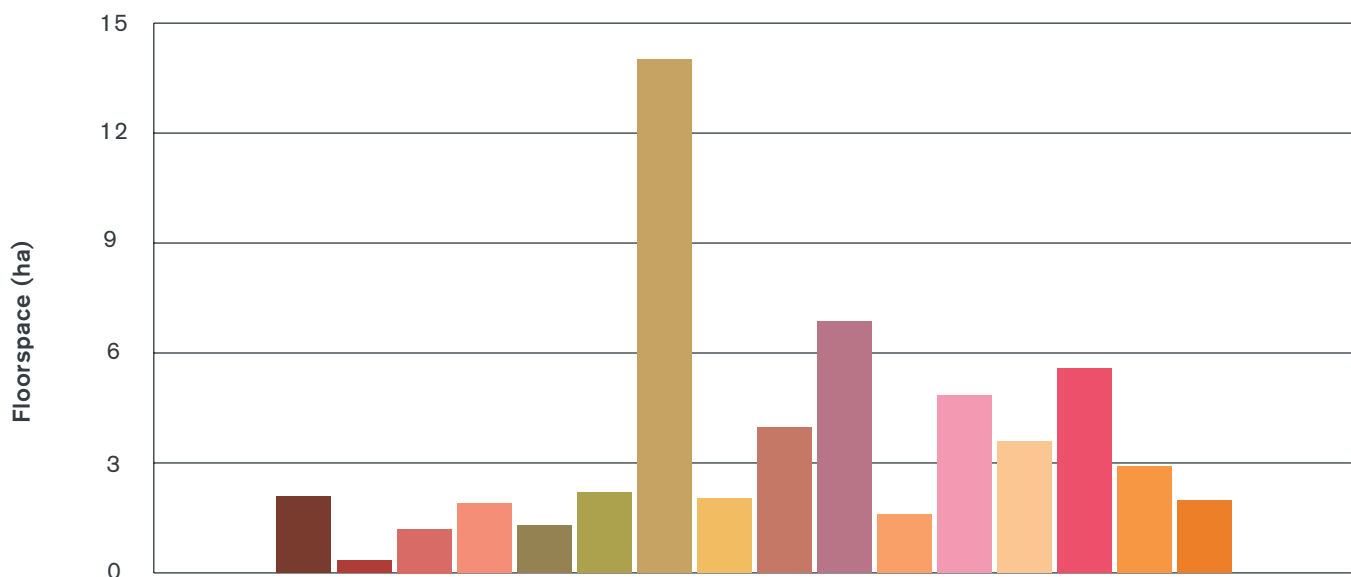


Fig 6. Distribution of total floorspace (ha) by business activity

Key sector: Manufacturing

The manufacturing industry accounts for 18% of total businesses on site, 14% of total employment and 10% of floorspace within the Charlton Riverside study area. As the business activity mapping on page 28 shows, the majority of the manufacturing sector is concentrated in the eastern edge of the study area.

The manufacturing sector as a whole can be further broken down into sub-categories, as shown in figure 7 opposite. The manufacturing of metals and machinery sub-sector is most significant in terms of employment; it accounts for 42% of all manufacturing jobs, which represents 6% of total employment within the study area. Businesses within this sub-sector include large-scale businesses such as Stone Foundries but also an array of smaller-scale, largely independent manufacturers of metal products. For example, Morco Blinds located along the Riverside, produces hand-built traditional awnings for Harrods and Fortnum & Mason.

Printing and publishing is another significant sub-category within the manufacturing sector. It accounts for 29% of manufacturing employment and 4% of total employment within the study area. These businesses include commercial printing and lithographic printing as well as graphics and signage. A large proportion of these businesses are located within subdivided pre-1945 industrial buildings at the eastern edge of the site, which are shared with other small manufacturers as well as businesses with the Arts and Culture sector.

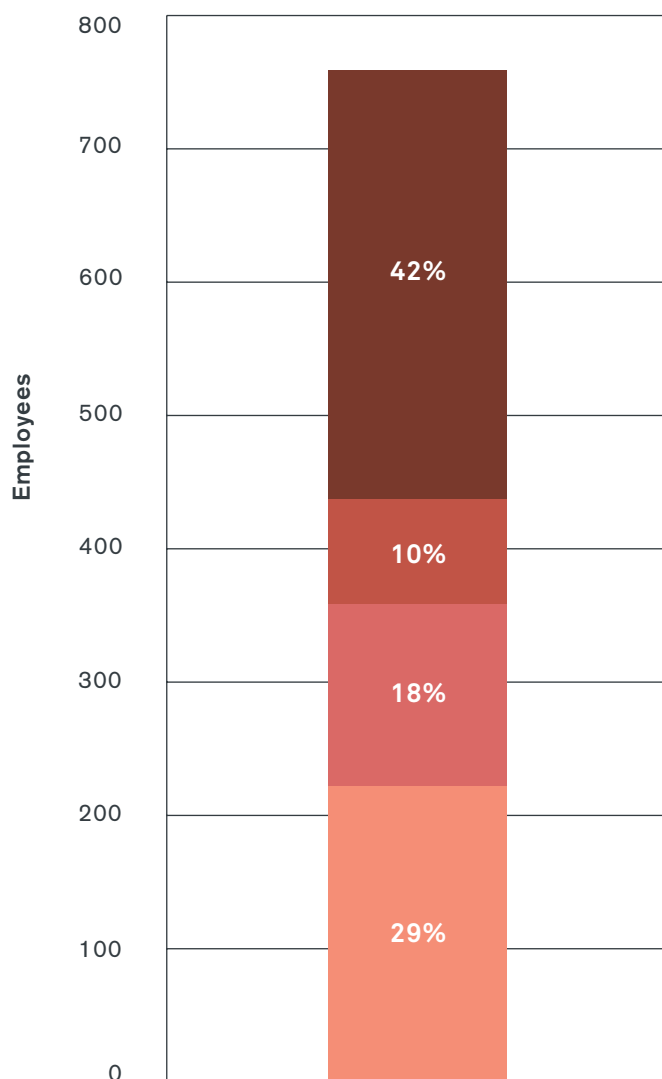


Fig 7. Distribution of total employment by manufacturing

Key

- Manufacturing: metals and machinery
- Manufacturing: food drink & catering
- Manufacturing: other
- Manufacturing: printing & publishing

Key sector: Arts and Culture

Premises and activities related to the arts and culture sector account for 10% of employment in Charlton Riverside. This specialism is a distinctive feature of the area, and although it is not uncommon for industrial areas to host artist studios and other creative production activities, the cluster at Charlton Riverside is the largest in any London's industrial areas.

The arts and culture sector is typically located within shared and/or subdivided industrial buildings, across multiple floors, on the eastern edge of the study area as identified in figure 14 on page 28, identified as buildings in 'In Multiple Occupation'. As such, this sector is typically associated with high levels of employment density. The sector accounts for 33% of total employment, while occupying 22% of total employment floorspace, demonstrating a capacity for more intensive use of employment space. Across the site, the sector typically accounts for an average employment density of 200 employees/ha.

The presence of large artist studio provider Thames-Side Studios, contributes to this particular spatial configuration as well as to the general landscape of study area. Thames-Side Studios, located in pre-1945 and newly provided post-2005 industrial buildings on Harington Way/Warspite Road, provides almost 500 individual studios. In addition to this provision, Art Hub provides around 40 studios across two buildings on Bowater Road and Commonwealth Studios on Woolwich Church Street provides around 25 studios for smaller-scale makers, designers and artists.

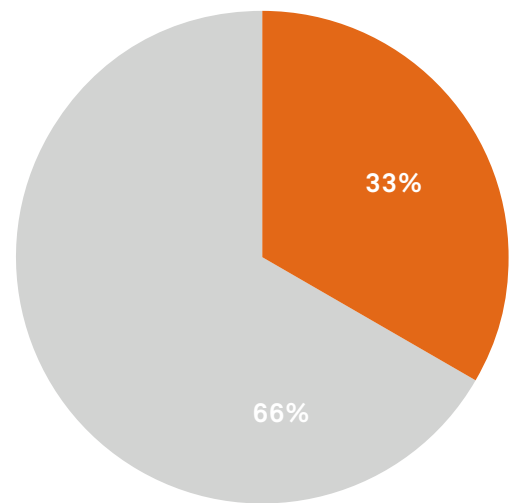


Fig 8. Distribution of total employment within the arts and culture sector

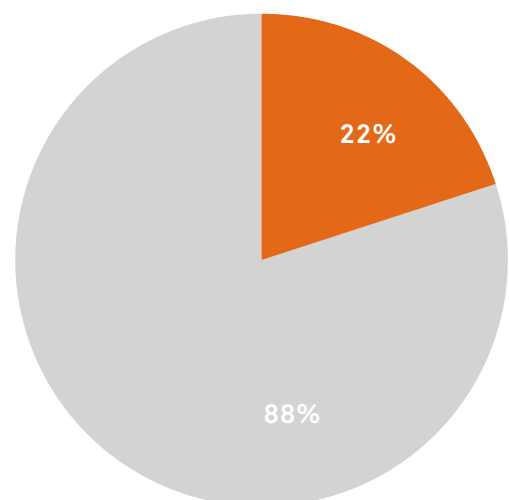


Fig 9. Distribution of total employment floorspace within the arts and culture

Key sector: Construction

Construction activities in Charlton Riverside account for 16% of employment and 29% of total floorspace.

Construction activities can be understood as being made up of two sub-categories; construction, which refers to traditional construction activities such as scaffolding, stone masonry, building contractors as well as aggregates processing and concrete mixing and construction-related retail, hire & wholesale, which includes trade counters, plant hire and building materials suppliers. The distribution of total employment and total floorspace within these construction categories is illustrated in figures 10 and 11.

Construction accounts for 25% of total floorspace due to the space-hungry nature of the businesses that compose this sector. Businesses such as Tarmac, Cemex and Day Aggregates located on the site's various wharves take up large amounts of open industrial land due to the scale of production activities. Over 3m tonnes of aggregates and cement are produced on site annually. Employment density within construction averages about 40 employees/ha.

Construction-related Retail, Hire & Wholesale activities have different spatial implication. They account for 4% of total employment and 4% of total floorspace on site. These trade counters and building material suppliers are often located within industrial estates.

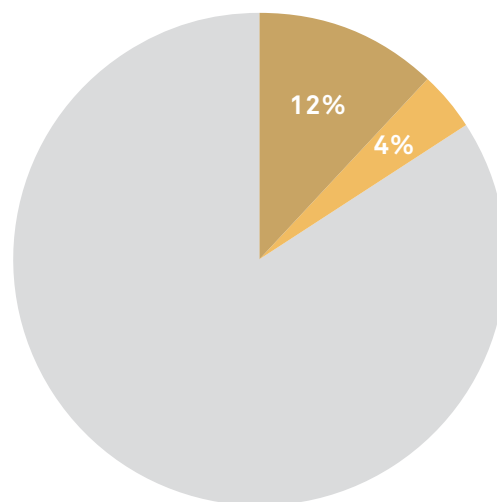


Fig 10. Distribution of total employment within the construction sector

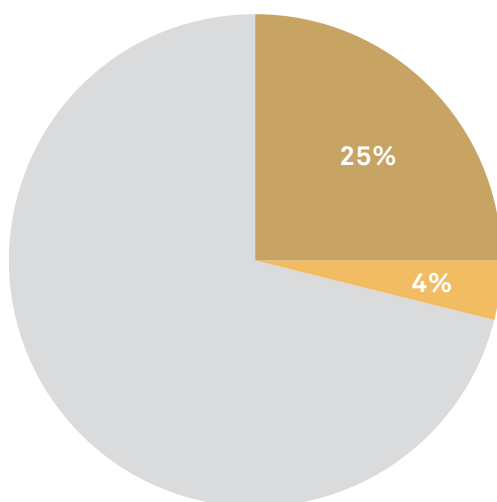





Fig 11. Distribution of total employment floorspace within the construction sector

Key

-  Construction
-  Construction-related retail, hire & sales
-  Other business activities

Key sector: Retail

The retail sector in Charlton Riverside accounts for 19% of total employment and most of the retailing activities are clustered along Bugsby’s Way, in the site’s various retail park developments.

The presence of key national retailers on site contributes to retail being a significant employment sector on site. The retail branch of Sainsbury’s alone accounts for 450 jobs. Spatially, retail activities in Charlton are associated with large-scale servicing yards as well as large-scale shared parking space. The footprint ratio of retail developments in Charlton is 0.28.

As such, although employment density of individual units is high, the density of the overall retail development sites drops significantly when accounting for ancillary servicing and parking.

Figure 12 below illustrates the difference between the total workspace area attributable to retailing activities when ancillary spaces are excluded and when they are included into calculations. Total floorspace occupied by retail in Charlton is around 7 hectares. When accounting for associated servicing and parking spaces, retail represents about 18 hectares. This in turn has a strong impact on employment density, which falls from 117 employees/hectares to 66 employees/ha.

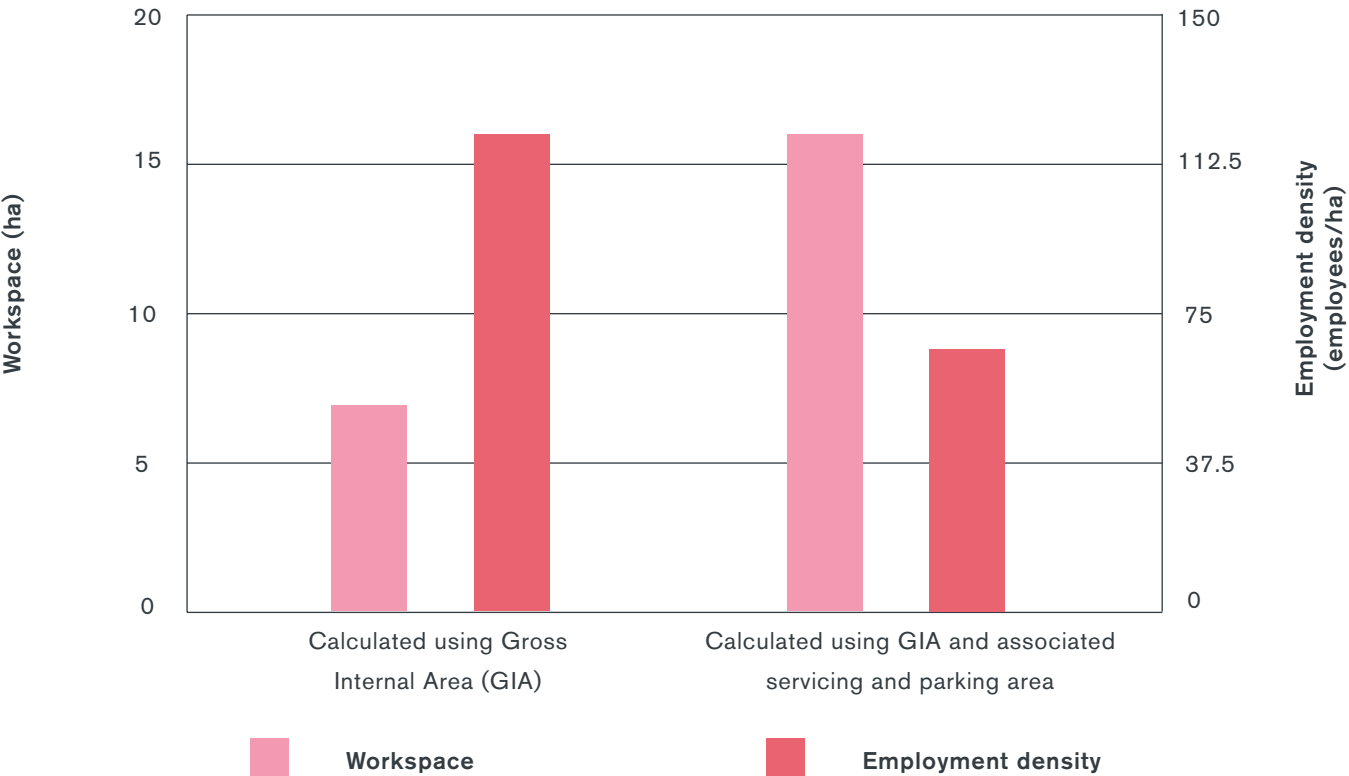


Fig 12. Distribution of floorspace and employment density within the retail sector

Key sectors: Services

The service sector in Charlton Riverside accounts for 13% of total businesses, 13% of total employment and 10% of floorspace.

The service sector can be further sub-divided in 4 categories which are services: education, services: public, services: professional and services: other.

Figure 13 shows the distribution of employment within the service sector. Most of the employment is accounted for by public services. It represents 54% of the jobs within the employment sector and 7% of total jobs on site.

The significance of the public services as an employment sector in Charlton is due to the presence of larger-scale employers such as the Environmental Agency, which runs the Thames Barrier site.

Educational services represent 18% of service-sector employment due to the presence of the Greenwich UTC and Windrush primary school on site.

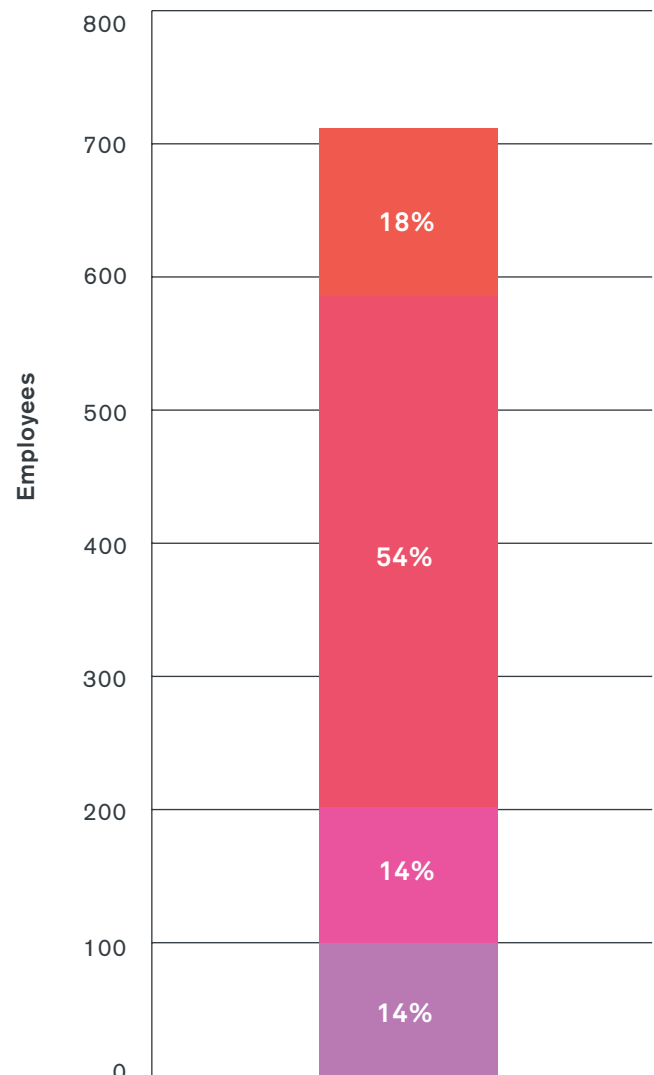
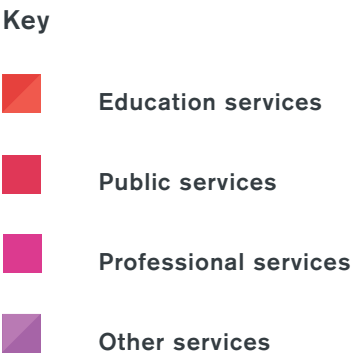


Fig 13. Distribution of total employment by service sector sub-category



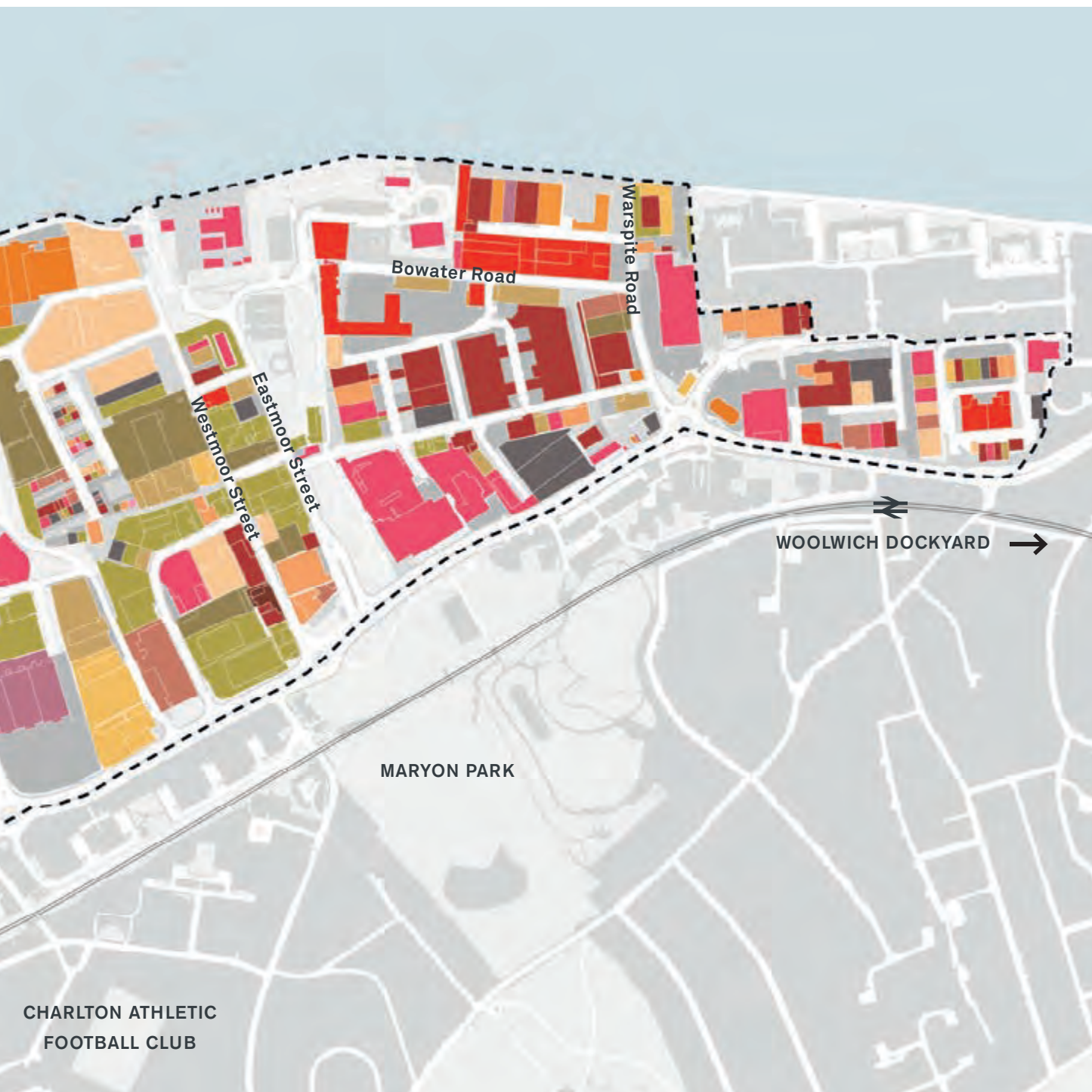
Page Intentionally Blank

Fig 14. Business activities across Charlton Riverside



Key

	Manufacturing		Retail		Restaurants, Leisure & Faith
	Utilities		Wholesale Warehousing		In Multiple Occupation
	Vehicle Sale, Repair and Hire		Retail Warehousing		Vacant
	Construction		Transportation and Logistics		Study area
	Wholesale		Services		



0

250m

Building types

Considered together, industrial buildings account for 55% of the total floorspace and yard space accounts for 24% of total employment floorspace. The remaining floorspace includes retail development at 14% of total employment floorspace and other, office and shop totalling the last 7%.

The division of industrial building types into age groups accounts for the variation in stock within the industrial building category but also acts as a timeline allowing to identify potential heritage assets as well as relatively recent development and investment. Most of the employment floorspace is housed in post-45 industrial buildings (28% of total floorspace). The post-2000 industrial buildings are largely accounted for by the recent development of the Sainsbury's distribution centre, the Charlton Gate industrial estate and a number of other standalone warehouses distributed across the site. A clustering of pre-45 industrial buildings can be found on the eastern end, where a lot of the site's built heritage assets can be found. There is one identified bespoke industrial or utilities premise on site, the Thames Barrier site. This building designation is typically associated with self-contained compounds with high level of security and fencing due to the nature of the activity on site. The majority of employment floorspace is made-up of post-45 industrial buildings, which are largely found across the site's various industrial estates.

The prevalence of yard space as a typology in Charlton is largely related to the presence of the wharves and surrounding construction sites, which as previously mentioned,

account for a significant proportion of employment and employment floorspace. A much smaller proportion of the site's overall yard spaces is made up of the clustering of vehicle repair and maintenance yards along Eastmoor and Westmoor Street.

The site's average footprint ratio shows that across Charlton Riverside, buildings on average only account for up to 48% of total land area. However, this value varies greatly across the site. The most western study sites feature a much lower average footprint ratio 0.21, which is accounted for by the presence of open industrial land, and retail development with large associated parking and servicing.

Figure 16 shows the distribution of building types by floorspace including parking and working yards (ie yards used in relation to the building's business activity). Working yards account for 16% of the total floorspace. This proportion is made up by larger-scale servicing areas, for instance around the Sainsbury Thameside distribution centre, smaller-scale servicing areas related to individual warehouses in industrial estates as well as smaller-scale yards accomodating storage of materials or product in the case of manufacturing or construction businesses.

There is also a large provision of parking in the overall study area, with 17% of total floorspace. This is accounted for by the larger-scale shared parking spaces along Bugsby's way, smaller-scale shared parking on industrial estates and smaller-scale private parking associated with individual businesses.

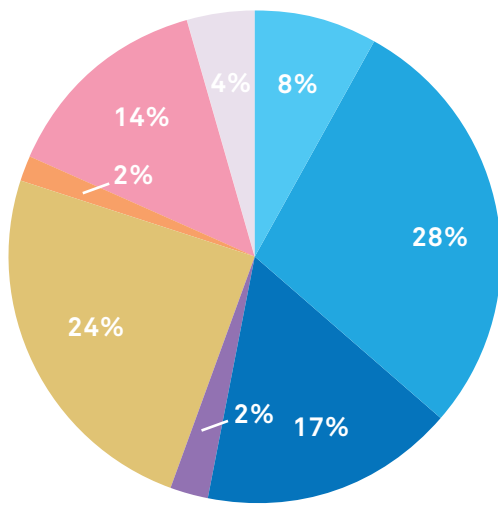


Fig 15. Distribution of total employment floorspace by building type

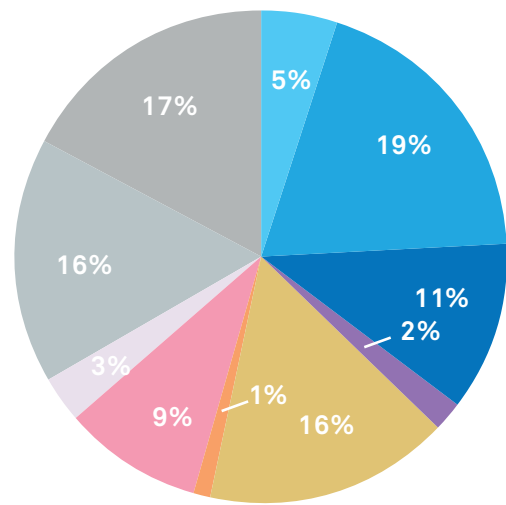


Fig 16. Distribution of total employment floorspace by building type including working yards and parking

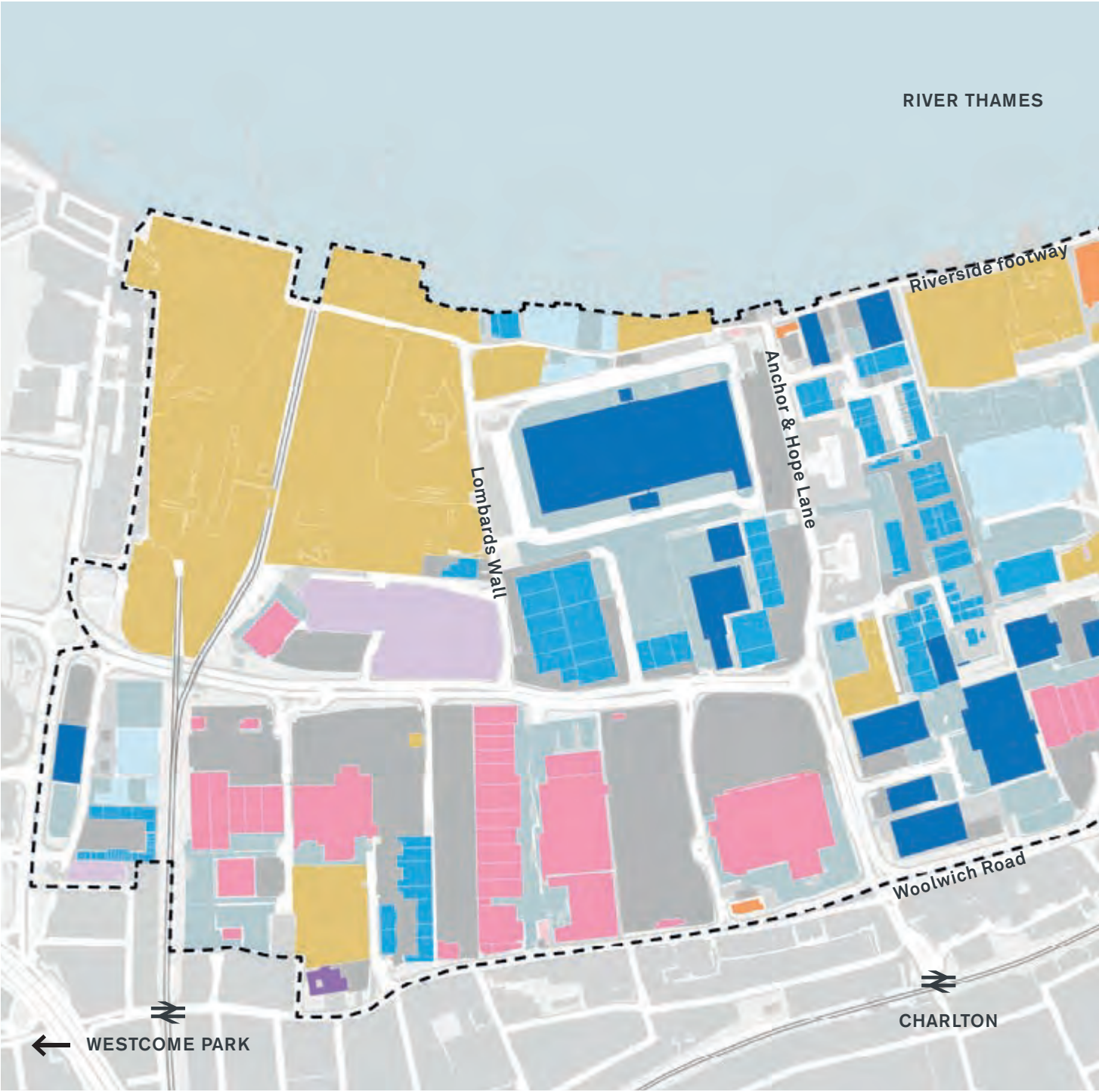
Key

■	Industrial building (Pre-1945)
■	Industrial building (1945-1995)
■	Industrial building (post-2005)
■	Bespoke industrial or utilities premises
■	Yard Space
■	Office Space
■	Retail Park
■	Shop
■	Other











Key

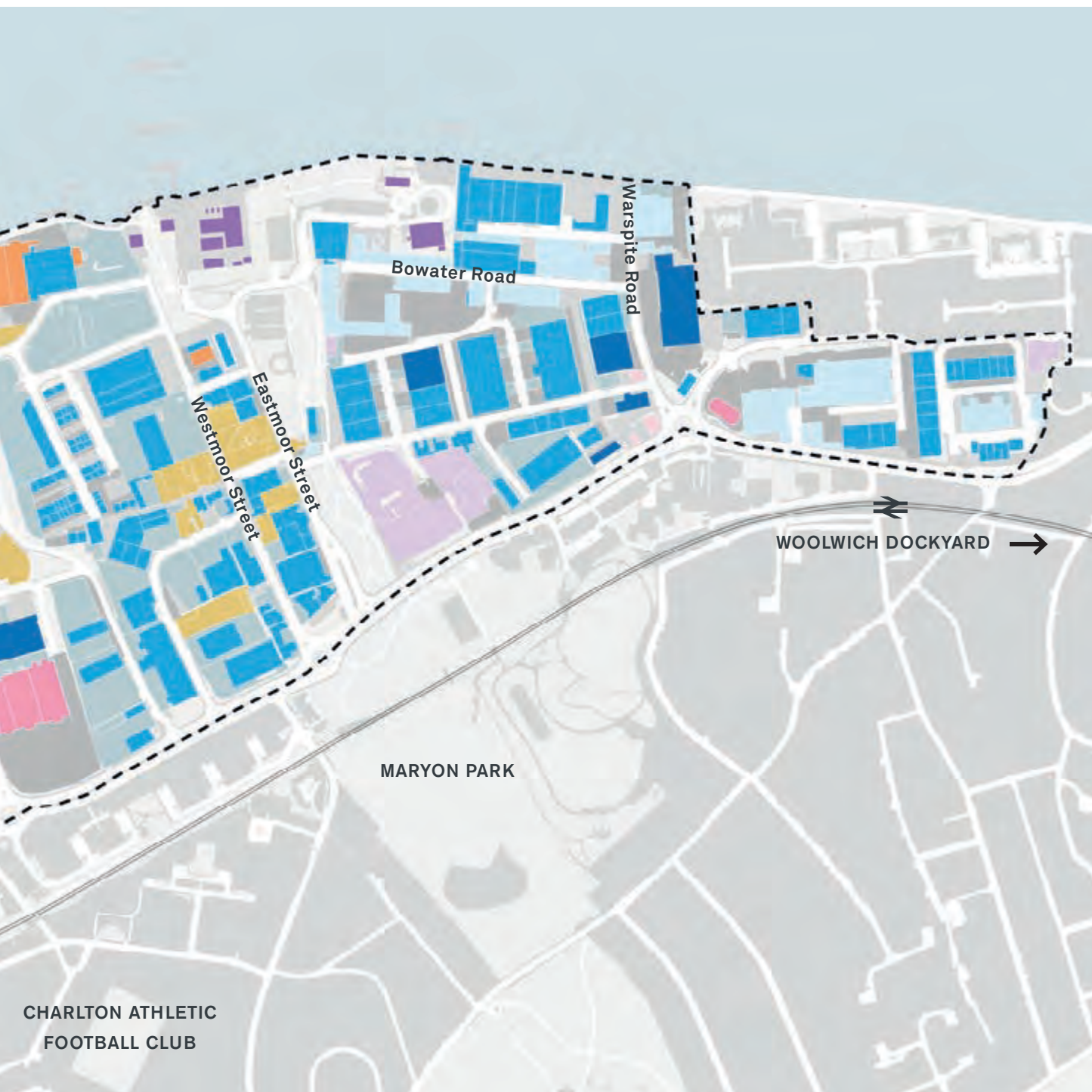
■	Industrial building (Pre-1945)
■	Industrial building (1945-1995)
■	Industrial building (post-2005)
■	Bespoke industrial or utilities premises
■	Yard Space
■	Office Space
■	Retail Park
■	Shop
■	Other
■	Working yard
■	Parking

Fig 17. Building types across Charlton Riverside



Key

	Industrial building (Pre-1945)		Office Space
	Industrial building (1945-1995)		Retail Park
	Industrial building (post-2005)		Shop
	Bespoke industrial or utilities premises		Other
	Yard Space		Study area



0

250m



Employment density

Employment density mapped in figure 18 is a geographical representation of employment density per individual workspace unit.

As such, it shows very precisely the variations in employment density across the study area. The representation of employment density per workspace unit is possible due to the accuracy of employment data gathered from each individual unit.

The highest levels of employment density can be found clustered at various locations across the study area but significantly, at the eastern edge of the site.

Further analysis of employment density per building type shows that pre-1945 industrial stock tends to host the densest employment activities, at an average of 145 employees/ha. This is followed by post-1945 industrial, at 97 employees/ha and post-2005 industrial stock at 74 employees/ha.

High density of pre-1945 industrial buildings in Charlton can be attributed to the fact that this typology tends to be subdivided in smaller workspace units hosting a wide range of businesses.

The retail developments along Bugsby also show a clustering of high employment density. Analysis of employment densities across building types show that retail units in Charlton Riverside have an employment density averaging at 117 employees/ha. The fact that Charlton Riverside features a number of key national retailers such as Marks and Spencer, Sainsbury's and Asda contributes to the high employment density within retail units on site, as these individual

businesses usually have a large number of employees and some businesses operate 24/7.

Clusters of low employment density in Charlton Riverside overlap with the wharf sites and surrounding open industrial land, reiterating the space-hungry nature of the construction activities on site.

Figure 19 represents employment density across Charlton Riverside when both parking spaces and working yards are accounted for. In this representation, employment density is not distributed across individual business workspace, but rather by areas that present similar spatial characteristics. This allows to distinguish the sites presenting certain spatial characteristics that contribute to lowering overall employment density.

As shown in figure 16, associated parking space and working yards in Charlton Riverside account for a significant share of total workspace; when accounted for, parking and working yards account for 17% and 16% respectively of total workspace on site. Certain activities such as retail, wholesale, retail warehousing and wholesale warehousing are supported by large-scale servicing areas to accommodate for high volumes of goods moving in and out of the site as well as large-scale shared parking spaces to accommodate the influx of customers.

For instance, when looking at the concentration of retail activities along Bugsby's Way, even though individual businesses might harbour high employment density levels, the spatial make-up of the site, with its large-scale servicing and parking provision translates into much

lower site-wide employment density levels. On the eastern edge of the study area, high employment density at the individual workspace level translates into high employment density for individual sites, even when accounting for associated yard and parking spaces. This again relates to the overall typologies and spatial configurations of these individual sites. As shown on figure 17 on page 32, the eastern edge of the study area shows a concentration of pre-1945 industrial buildings. These buildings are shared between a number of businesses housed in smaller subdivided units. The scale of associated yard spaces is also much smaller. Individual businesses often share servicing and parking provision.

Fig 18. Employment densities by floorspace across Charlton Riverside



Key

	0-39 employees/ha		120-199 employees/ha
	40-79 employees/ha		200+ employees/ha
	80-119 employees/ha		Study area

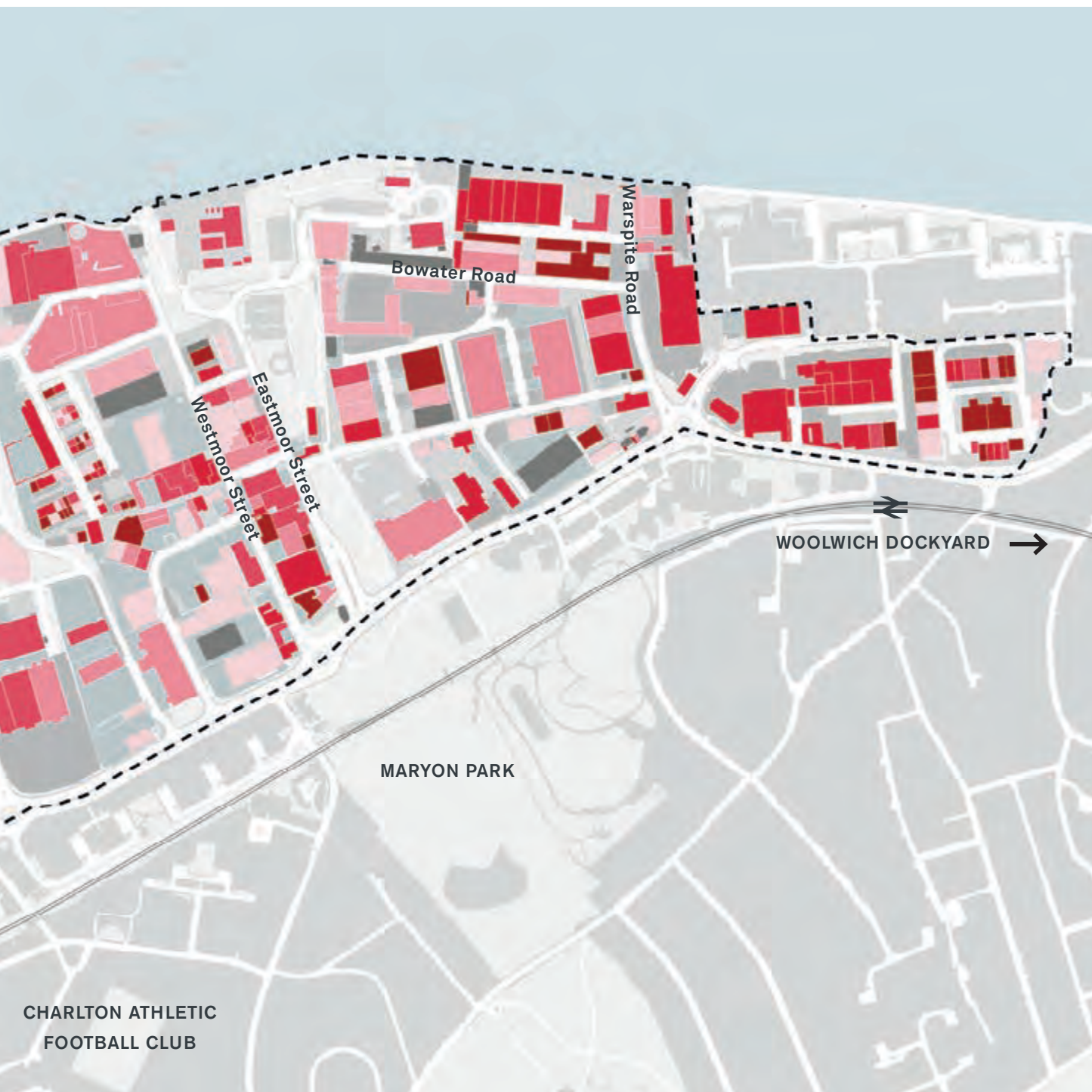
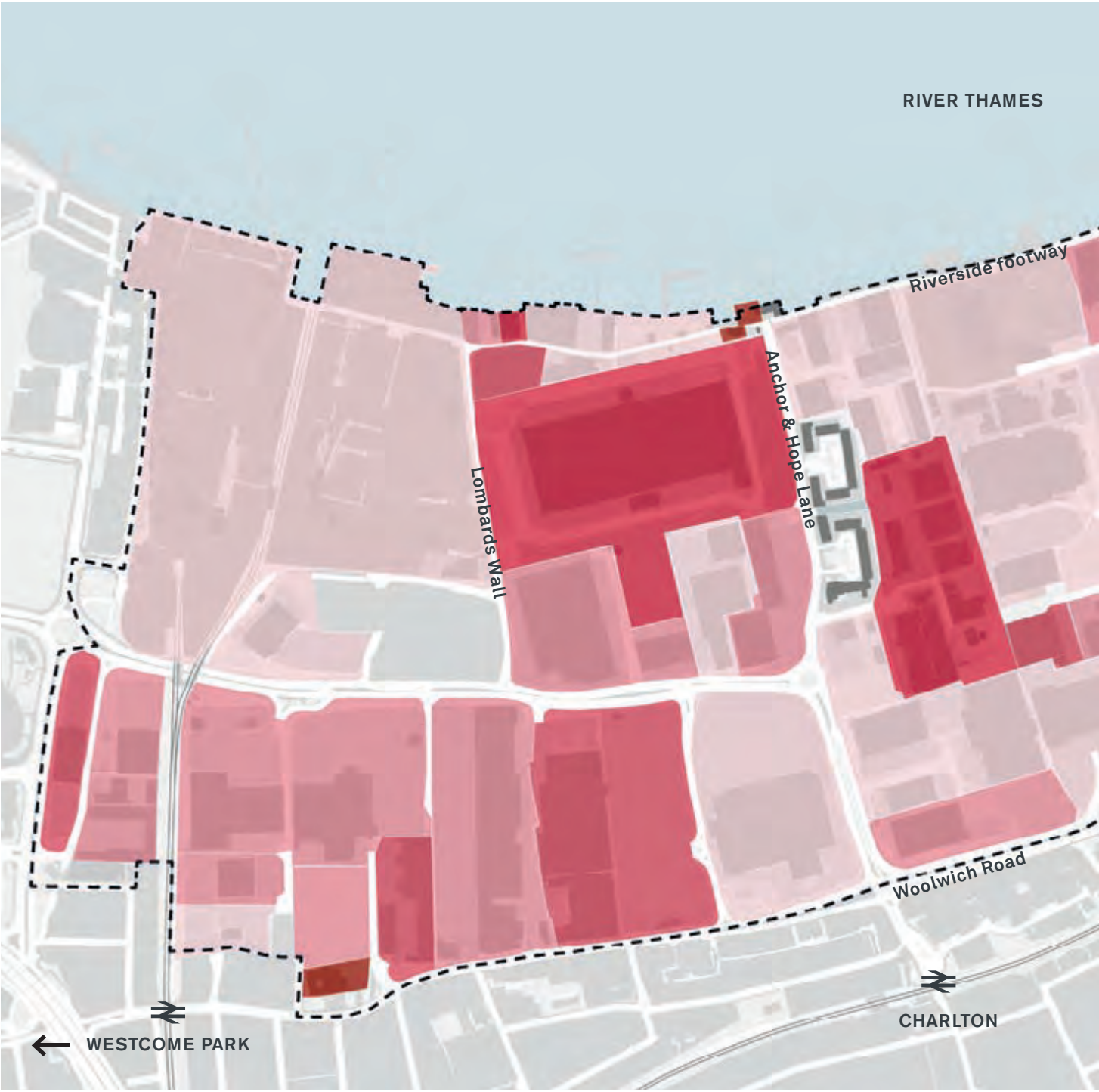
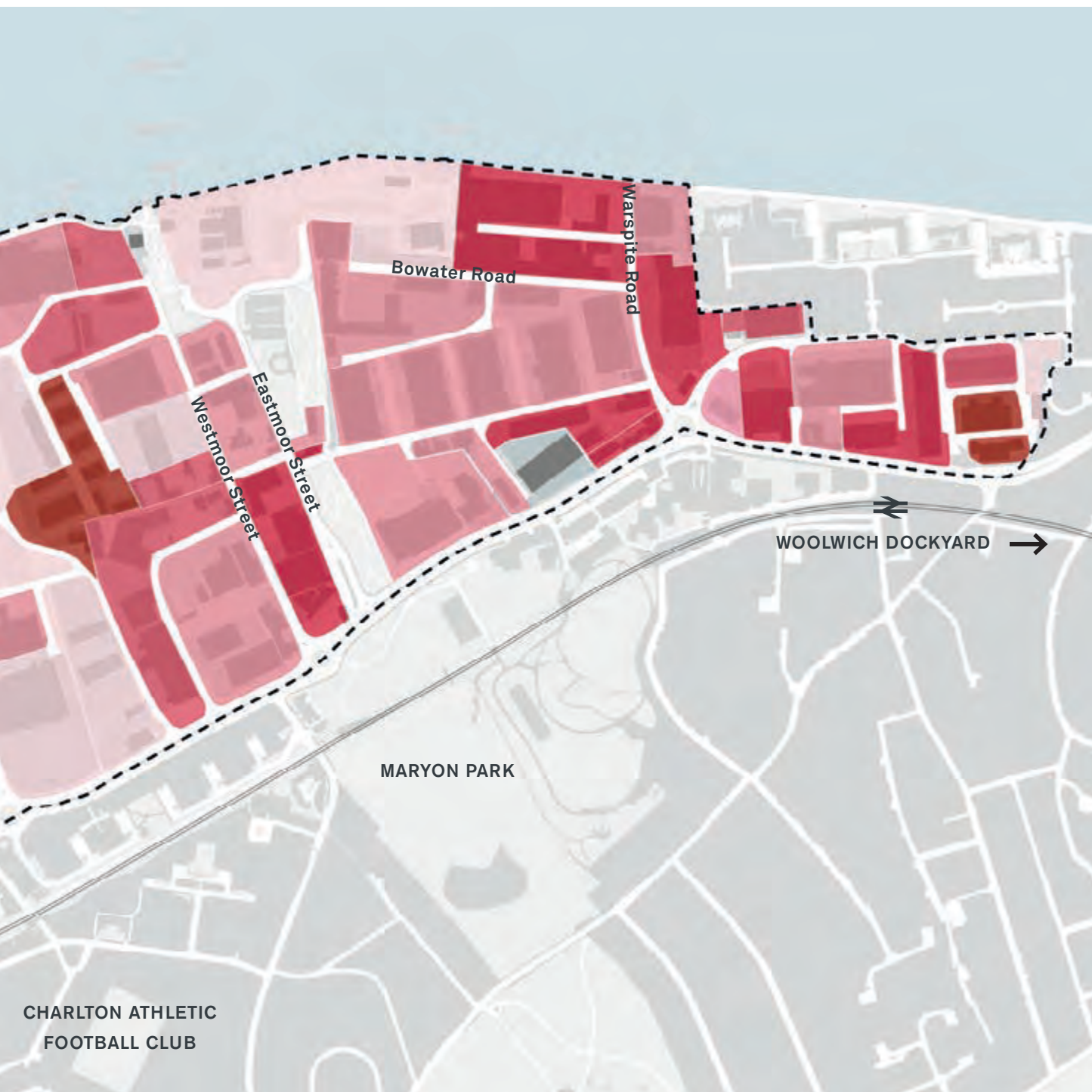


Fig 19. Employment densities by site area across Charlton Riverside



Key

	0-39 employees/ha		120-199 employees/ha
	40-79 employees/ha		200+ employees/ha
	80-119 employees/ha		Study area



0

250m



Study sites summary

Given some of the distinct employment clusters and building type distinctions across the wider study site, the area has been sub-divided into four sites for further detailed analysis. These sub-area sites align with the divisions suggested by RB Greenwich and used in previous mapping exercises.

Although Site 1 is home to the most recognisable concentration of industrial activity in the area, key clusters of creative uses, retail and smaller-scale industrial activities operate in proximity in Sites 2, 3 and 4 and all speak to how Charlton Riverside has developed and works today as a location for a variety of industrial-type uses.

Overall, Site 3 contains the highest proportion of the businesses across the total study area, but site 4 is the densest in terms of employment. This relates directly to the type of activities taking place in this site - particularly the number of artist and small business studios accommodated in some of the site's key heritage buildings. Site 1 is home to the largest industrial operations in Charlton Riverside, with a small number of businesses employing a considerable number of employees in space-hungry, yard-based activities.

Site 2 is gathers together the key retail functions in the site, including public-serving retail parks, large single-occupier retail development like M&S or Makro, as well as the large distribution centre for Sainsburys. This site is bisected by Bugsby's Way along which key bus routes, retail customer traffic and HGV movements from site 1 are accommodated.

Site 3 is the densest of the sub-areas in terms of the density of its built form. A patchwork of industrial buildings and yardspaces make up the site, with has the highest average footprint ratio of the four sub-areas, again highlighting the physical 'fullness' of the area. The site offers little opportunities for east-west thoroughfare and continues to host a regular HGV and van traffic which serve the numerous mid-size industrial estates located throughout the site.

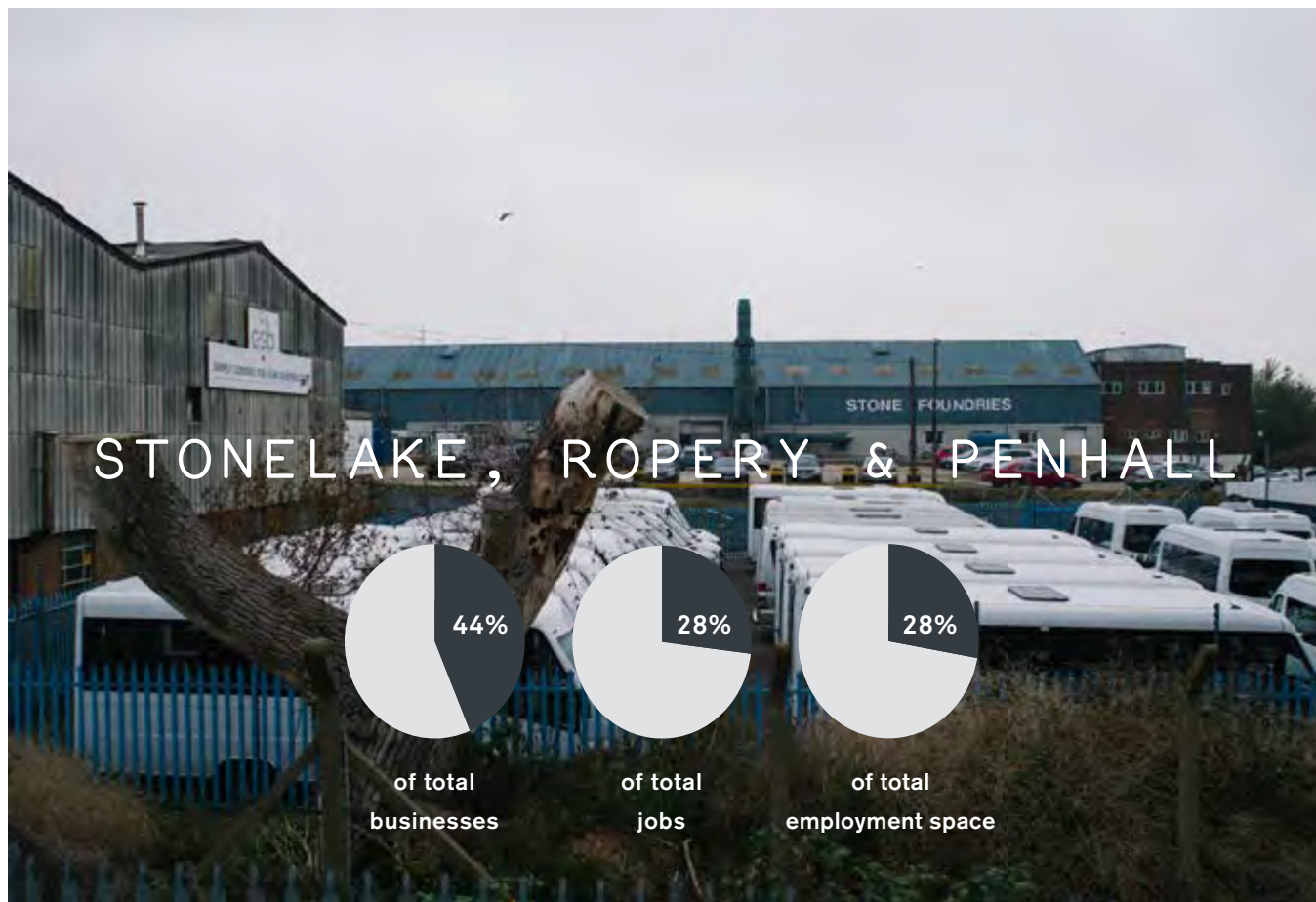
Site 4 is the site of the most prominent cluster of heritage buildings in the area. Clustered around Bowater Road and off Woolwich Church Street, these buildings are occupied by a mix of small studio units for artist, maker and small business uses, as well as by a concentration of printing activities. The site also includes the Thames Barrier operations site, strategically important Environment Agency land and a small linear park linking the barrier site down to Woolwich Road. The site is animated by educational uses including Windrush Primary School and the Royal Greenwich UTC.



Fig 20. Study site boundary and sub-divisions as used in the study

Employment Sites	Total Businesses	Total Employees	Total Employment Space (ha)	Employment Density (employees/ha)	Average Footprint Ratio	Vacancy Rate
Site 1: Wharves	8	205	10.7	18	0.02	0.0%
Site 2: Bugsby's Way	89	2,145	18.8	115	0.41	1.4%
Site 3: Stonelake, Ropery & Penhall	152	1,538	15.9	94	0.65	3.2%
Site 4: Mellish & Westminster	99	1,794	11.5	147	0.43	3.1%
Total	348	5,682	56.9	94	/	2.5%





Site 1: Wharves

Case study business: Tarmac

Activity sector:	Construction
Jobs:	60
Size of premises:	3.90ha
Type of premises:	Yard space
Adjacent activities:	Construction, utilities, construction-related retail

Business basics

- Currently one of the largest 'marine aggregate terminals' in Europe in terms of output.
- The site operates 24/7.

Tarmac is major building materials and construction company, which employs approximately 6,900 people across 400 sites all around the UK. Tarmac has a number of riverside operations at Northfleet, Charlton, Erith, Thurrock and Greenhithe. The Tarmac plant located on Murphy's Wharf operates mainly as storage for aggregates for the manufacture of road coating materials. The Tarmac plant also features an on-site concrete plant producing ready-mix concrete to supply neighbouring markets.

Staffing

Operations on site run 24-hours, 7 days a week so staffing runs across day and night shifts. There are usually 9 employees on site during the day, and 6 during the night. As a whole, the Tarmac site employs about 60 people.

Doing business in Charlton Riverside

Location is a key aspect of Tarmac's operations in Charlton Riverside. Its position on the south side of the River Thames and near Blackwall tunnel gives it direct access to the London market, and more specifically

central and east London. Tarmac has been located on Murphy's Wharf on a long-term lease which expires next decade. The scale of operations and locational advantages inform Tarmac's desire to remain on site and renew a long-term lease.

Tarmac has another plant in Charlton located on Riverside Wharf, which is responsible for the production of building materials. The Riverside Wharf Tarmac site also operates 24-hours a day, 7 days a week however both sites remain independent for each other in terms of staffing, equipment and production processes. The Riverside Wharf acts as a complement to the Murphy's Wharf site-providing increased production capacity to supply the South East and London markets.

Local links

Tarmac operates independently from other surrounding businesses, although its location on a safeguarded wharf and within a cluster of other construction activities is significant in terms of compatibility of uses as well shared business interests. Tarmac is located next to Aggregate Industries & Cemex (at Angerstein Wharf) & Day Group (at Murphy's Wharf), which all and share similar concerns over the continued safeguarding of the wharf site and related activities.

Future prospects

Tarmac, in conjunction with the other aforementioned wharf site operators, have expressed concerns regarding the potential conflicts between current and new land uses. Their view is that residential uses and other noise sensitive uses should not be located in the vicinity without the introduction of 'buffer zones' and other considerations that might mitigate the friction between otherwise incompatible uses.



The Tarmac plant operates as storage of aggregates and can hold up to 26,000 tonnes of aggregates on site.



The Tarmac open air industrial premises include a conveyor system to transfer and stock aggregates.

Site 2: Bugsby's Way

Case study business: Sainsbury's Distribution Centre

Activity sector:	Retail warehousing
Jobs:	350
Size of premises:	5.736ha
Type of premises:	Post-2005 industrial building
Adjacent activities:	Wholesale, transport & logistics, construction-related retail

Business Basics

- Sainsburys distribution centre serving 181 stores around the South East.
- Operates 24/7, 364 days a year.
- Operating on the Charlton Riverside site for 25 years, under a long lease.

Staffing

Logistics management company Wincanton operate this centre on behalf of Sainsburys. Wincanton employs 400 people directly to work at the centre, as well as approximately 350 people through agencies. Given the nature of the shift work at the centre, on an average day the centre will have between 300-400 people working on site.

The majority of staff (70%) drive to work, with few making use of public transport, especially given the 24-hour shift timings of the centre. It is estimated that 60% of the centre's staff live within 2-3 miles of the site, 30% live 3-10 miles away and 10% live over 10 miles away. Some staff take up to 1.5 hours to get to site for night shifts.

Wincanton made use of the Woolwich Job Centre when the centre re-opened, conducting 500 interviews in three weeks. One of the planning conditions attached

to the site is a 40% local employment obligation.

Doing business in Charlton

Wincanton considers the transport networks, particularly access to the Blackwall Tunnel, as one of the key strengths of the centre's location. This strength is often compromised by traffic congestion. Local public transport links and RB Greenwich support networks for staff are seen as other strengths of operating in the Charlton Riverside area.

The centre's key business links are with other Sainsburys distribution sites, rather than with any neighbouring businesses or more localised suppliers. The centre does not deliver to the large Sainsburys store on Woolwich Road as it is classified as a Superstore rather than a Convenience store.

Future Prospects

The centre is currently four years into a new fifty year lease. Wincanton and Sainsburys are looking to incorporate more on site in terms of servicing and deliveries - including things like an on-site vehicle maintenance unit and collecting stock directly from suppliers instead of relying on third-party hauliers as is current the case.

The centre built to serve 200 stores, and is almost operating at capacity. Wincanton is expecting employment on site to increase slightly over the coming year as the centre fills up its existing capacity. The current store platform that the centre services is not expected to change in the near future, despite shifts within Sainsburys to test different store formats.



Primary picking and storage space at the centre. The centre holds 1,500 product lines.



Transport office on site managing delivery operations and driver shifts.

Site 3: Stonelake, Ropery & Penhall

Case study business: Cory Environmental

Activity sector:	Utilities
Jobs:	85
Size of premises:	0.68ha
Type of premises:	Pre-1945 industrial buildings & post-1945 industrial buildings
Adjacent activities:	Construction, retail warehousing

Business basics:

- Cory has been based in Charlton since 1874. Originally, it ensured the trade and transport of coal up and down the river Thames for industrial uses.
- Cory now moves 700,000 tones of waste along the Thames annually.

The Charlton location is a subsidiary of Cory Environmental registered under Riverside (Thames) Ltd and responsible for riverside operations and barge repairs.

Staffing

Cory (Riverside Limited) employs 85 people in Charlton. There are approximately 45 workers on site daily from Monday to Friday. Working hours are organized around tide times, which shift throughout the year and operating hours average around 12h/day. The fact that Cory is engaged in long-term contracts allows for a certainty and stability in terms of employment needs, which contrasts with other types of riverside employment that can be seasonal-based. Recruitment is usually done through word-of-mouth, and targeted at specialist workers with MCA Boat Master License qualifications. Cory has recently started running an apprenticeship scheme, collaborating with the North Kent College

and the Thames Training Academy in an effort to attract a new cohort of workers to the industry and ensure that it will have the adequate skilled workforce in the future.

Doing business in Charlton Riverside

In relation to the location of Cory's contracts, the Charlton site is at an ideal point along the river to carry out the necessary maintenance and repair work on the barges. The location in relation to the Thames Barrier is also key for the business operations; given that all the waste collections points and the Charlton location are on the same side of the Barrier, businesses operations can continue even when the barrier closes.

Local links

Cory has a strong historical link to the area, having been on site since 1874. Nowadays, it maintains informal links to the riverside communities, where it sources the majority of its workforce as well as with other riverside businesses that share similar interests related to riverside operations.

Future prospects

Given the long-term nature of the contracts, there is no anticipated increase or decrease in the size of the workforce, as output remains stable for the duration of the contract. The company will potentially have to increase the number of barges in its fleet, as some of them were purchased in the 1980s and require a high level of maintenance. The most significant upcoming changes relate to the premises. There is a need to modernize the premises, as some of the barges are now too large to be pulled onto the shore and into the sheds for repair. Further considerations in terms of the heritage value of the site is covered in Chapter 3.



Cory employs 85 on site and has recently implemented an apprenticeship scheme in collaboration with various colleges.



Working hours are organized around tide times, which shift throughout the year.

Site 4: Mellish & Westminster

Case study business: Thames-Side Studios

Activity sector:	Arts & Culture
Jobs:	Estimated 500 people across 460 studios
Size of premises:	2,02ha
Type of premises:	Pre-1945 industrial buildings & post-1945 industrial buildings
Adjacent activities:	Manufacturing, Services, Restaurants, leisure & faith

Business basics

- Europe's largest single-site artist studio provider.
- On site facilities include printing studio, gallery space and sculpture workshop.
- Currently expanding to provide more studios in existing industrial buildings.

Staffing

The studio complex and its facilities are managed by a team of around twenty people, working between building and site maintenance, studio management, exhibition programming and running particular facilities. The core studio management team also offers professional advice, pastoral care and run courses and workshops in the site's education space which offer industry knowledge and guidance to tenants. An estimated 500 artists, designers, makers, and assistants work across the complex's 460 studios. Tenants include fine artists, jewellery designers, ceramicists, writers, furniture makers, fabric designers, and even a double bass maker.

Doing business in Charlton Riverside
Thames-Side Studios operate alongside a range of other industrial production and professional service activities on

Mellish Industrial Estate. In most cases these activities are happening in the same buildings as those in which studios are situated. Emafyl still carries out some manufacturing on the site, and other businesses on the industrial estate include Hangar Arts Trust, a charity that specialises in rehearsal space and facilities for circus training, two businesses involved in coffee roasting and distribution, a specialist frozen food production and packaging company and The Reach- a climbing wall which attracts over 100 visitors every weekend. Annual open studio events attract visitors to the site from across RB Greenwich as well as from further afield in London.

Thames-Side Studios are working on building working relationships with colleges and schools in the area, and to raise the profile of the site within the borough and beyond.

Future prospects

Since its inception on the riverside site, the studio complex has grown from operating in one building to currently offering space in nine buildings on the industrial estate. Expansion is continuing on site, with Thames-Side Studios taking over more space in industrial units previously used by Emafyl and other industrial businesses.

In the spring of 2017, Thames-Side Hub will be launched on site: a serviced facility for hot-desking in one of the complex's riverside buildings. Desks will be rented for £20/week for the first six months the Hub's opening. A new photographic facility will also be opened this year in which artists and makers can record their practices and pieces to a professional standard, helping artists to maintain professional profiles.



Refurbishments to Mellish House to provide additional studios on the industrial estate. The building is also home to food production businesses and facilities for circus arts.



One of Thames-Side Studios 460 tenants at work in her studio.

Detailed interview analysis

In addition to site wide employment surveying, structured face-to-face and phone interviews were carried out with a number of businesses to gain further insight into employment activities, premises and operational networks in Charlton Riverside. The sample of businesses selected for longer interviews is reflective of the activity sector breakdown of the overall study area. This ensures that the both the variety and significance of each sector is adequately weighted.

The interview sample represents approximately 10% of total businesses in the overall study area. The businesses interviewed account for 1,245 employees and therefore represent almost 25% of total employment on site. Respondents include businesses such as Victorian Awning company, Jackson Lifts, Makro, etc. The findings that emerge from these longer interviews start to paint a more qualitative picture of the Charlton Riverside economy.

Business basics

Questions addressing organisational structures and employment numbers allow for a more detailed profile of businesses in the study area to be built up. Data gathered reveals a well-rooted business base. Of the total businesses interviewed, 69% have been located on site for 10 years or more, either occupying their current premises, or other nearby premises. As shown in figure 27, the interviewed business base is composed in the majority of independent businesses (56% of businesses).

This figure is lower than in more 'high-street type' industrial locations such as Old

Kent Road where independent businesses account for 77% of total businesses, but higher than in other, more comparable, large-scale industrial locations like North East Enfield, where independent businesses account for 42% of total businesses.

Figure 28 alongside shows the distribution of interviewed businesses by organisational structure and by number of employees. This distribution highlights that large-scale employers (50+ employees) in Charlton Riverside are typically branches or subsidiaries, whereas businesses employing between 0-9 are largely independent businesses.

Figure 28 also highlights that the bulk of businesses interviewed have a workforce size between 10-49 employees (60% of total businesses) - a much larger proportion of businesses of this size than typically employment areas which are largely businesses employing 0-9 people.

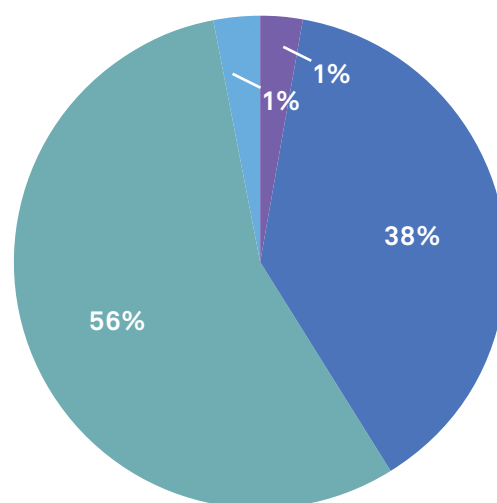


Fig 27. Distribution of interviewed businesses by organisational structure

The Charlton Riverside economy features notable number of businesses operating outside of typical business hours. All interviewed businesses had daytime operating hours (approximately from 8am to 6pm), with half of these businesses also open in the evenings (after 6pm). 9% of businesses had 24-hours on-site operating hours, with an additional 3% of businesses having a 24-hour off-site services. Businesses with 24-hour on-site

activity are typically within the construction, metal manufacturing and retail warehousing sectors, all run by featuring large-scale operators. More typical daytime opening hours are associated to sectors such as Services (30% of responding businesses) and small manufacturing (25% of responding businesses).

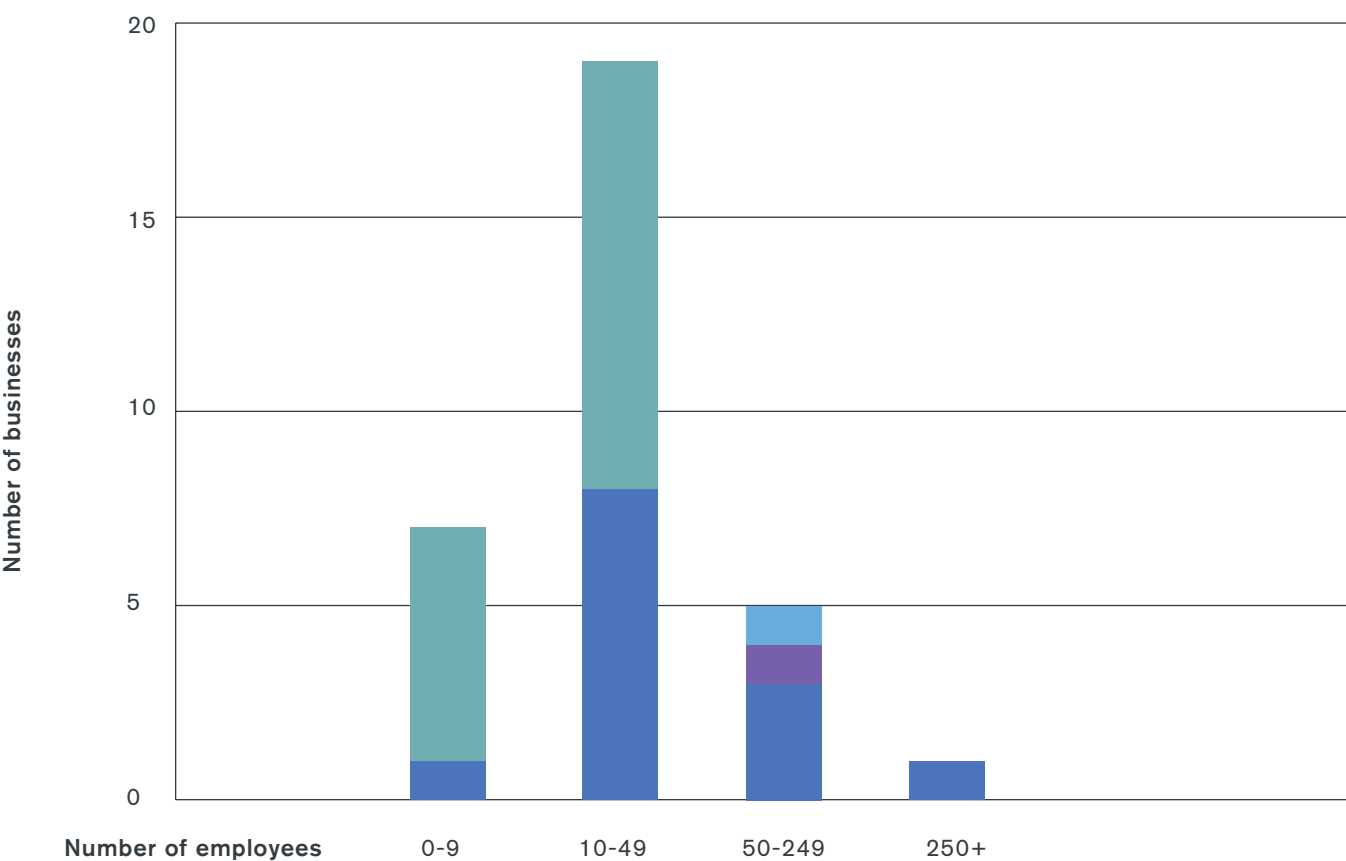


Fig 28. Distribution of interviewed businesses by organisational structure and number of employees

Key

- Headquarter for more sites
- Independent business
- Branch or subsidiary
- Other

Employment

Local employment stands out as an important contributor to the total workforce in Charlton Riverside. 65% of businesses interviewed had at least 50% of their staff living locally (i.e in RB Greenwich and adjacent boroughs). Of the businesses reporting a local employment rate above 75%, 72% are independent businesses operating from smaller industrial premises. While a handful larger retail warehousing operations also account for a large quantum of local employment, these jobs are typically lower-skilled and part-time opportunities, tied to particular operators. This analysis

highlights the value of smaller industrial businesses in providing a more diverse and robust local employment opportunities. Figure 32 below shows the distribution of local employment across sectors. Arts & culture, services, retail and manufacturing feature average levels of local employment above 50%. This is significant given that retail, manufacturing, services and arts & culture account for 19%, 14%, 13% and 12% of total employment respectively, illustrating the value of these specialisms not only in terms of providing employment in Charlton Riverside, but in terms of providing local employment opportunities

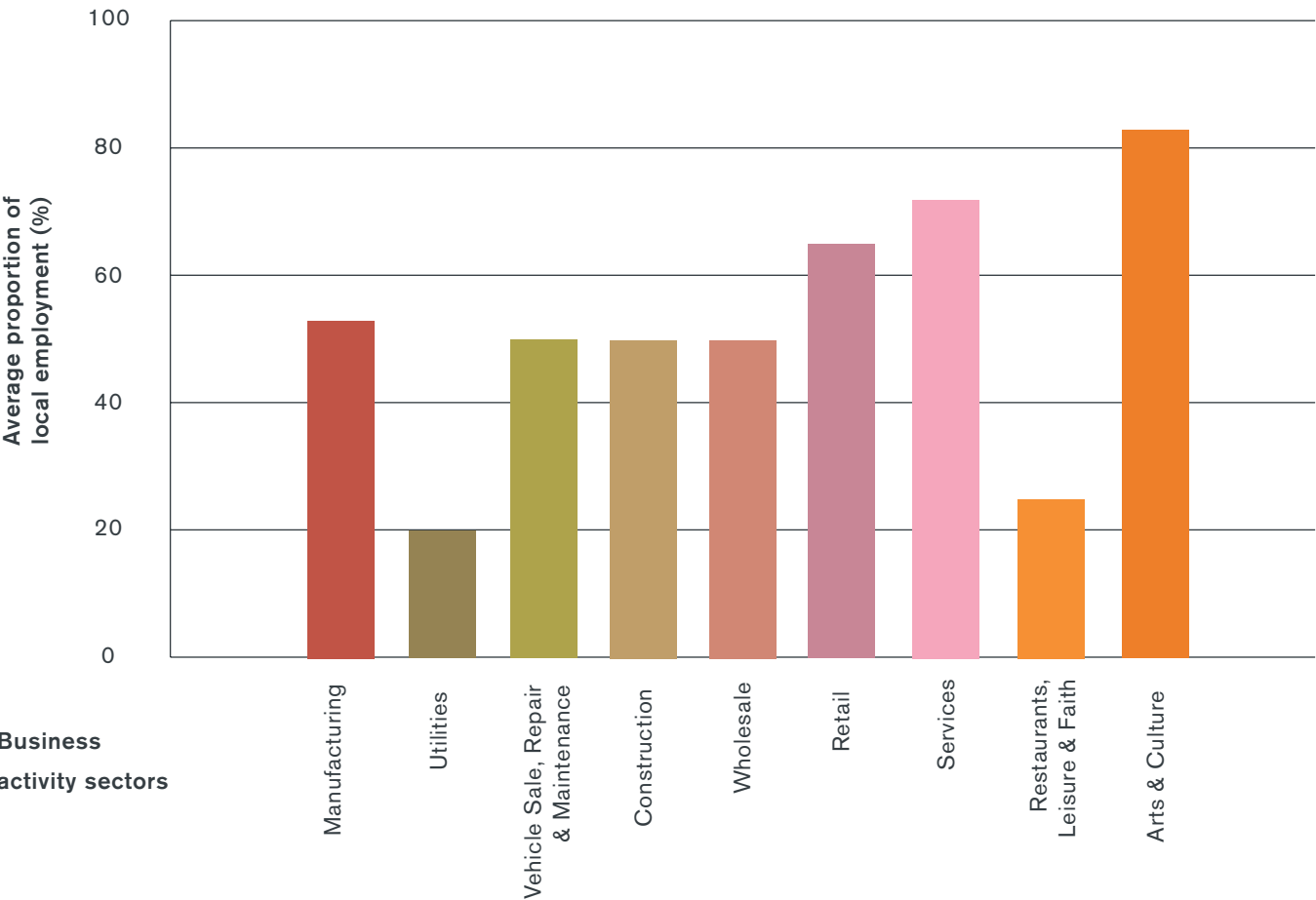


Fig 32. Average proportion of local employment (%) per business activity sector

on site. Based on longer interview data for local employment, the manufacturing sector employs 42% of its workforce locally, which across the entire study area amounts to approximately 350 jobs. For the retail sector, this proportion is 64%, which across the entire study area accounts for approximately 640 jobs.

Further qualitative insight into individual workforces reveals a wide-range of specialists skills and qualifications engaged in employment activities. A significant proportion of skills on site relate to the manufacturing sector, where businesses require specific engineering and craft skills as well as handling of machinery. The manufacturing sector also often relies on creative sector skills for the design-related aspect of their production processes.

The majority of the workforce in Charlton Riverside travels to work by car (54% of workforce accounted for by interviewed businesses). A smaller proportion use public transportation (38% of workforce accounted for by interviewed businesses), and very few walk or cycle to work, as illustrated in figure 33 alongside.

Questions into individual business aspirations reveal a stable business environment for a significant proportion of interviewed businesses, as well as modest perceived prospects for growth. When asked about predicted changes in employment, 47% of interviewed businesses anticipated their employment needs to remain the same, 34% of businesses anticipate a slight increase and 13% anticipate a significant increase.

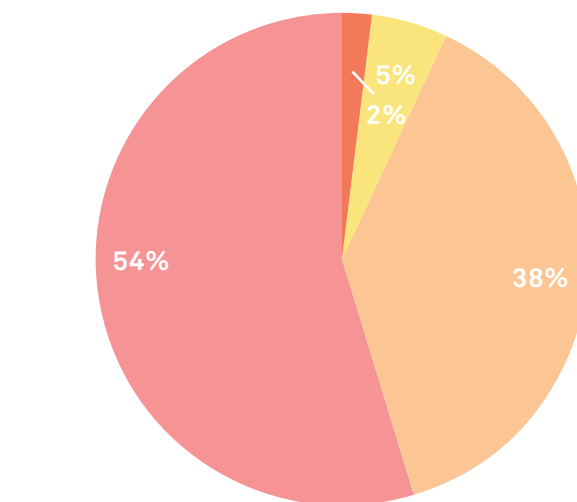


Fig 33. Distribution of employment by method of traveling to work

Key

■	Walk
■	Cycle
■	Public Transportation
■	Drive

Only 6% of businesses anticipated their employment needs to decrease. In terms of anticipated changes in spatial needs, the majority of businesses responded that necessary space for business operations would remain the same in the near future (72% of interviewed businesses) and 18% anticipated a slight increase in spatial needs.

Perceived locational advantages and challenges

When asked about locational advantages, the most recurring answer from businesses related to the strong transport links of the site (21% of responses). This includes the site's proximity to North Greenwich station and Charlton station, the various bus routes that run adjacent to the area, as well as the main road networks which many businesses use for supply and delivery purposes. These benefits are understood in terms of both the staff and customers being able to access the site easily.

Other advantages related to the availability of local staff (12% of responses) across the manufacturing, construction and service industries. Access to a local customer base represented 11% of responses across the services, retail and wholesale sectors; businesses identified Charlton as an ideal location to service South East London.

Equally, businesses in Charlton highlighted the benefits of a location in proximity to central London (11% of responses) in terms of the access it gives to specific customer bases; some of the businesses in Charlton are the only London-based branches of wider UK-based chains. The physical proximity to Central London through the Blackwall tunnel is understood as particularly beneficial. Remaining individual responses about the locational advantages of operating in Charlton included the shared parking space in retail park locations, the spatial characteristics of the industrial built (large-scale of workshop sizes), the networks of support across clusters of similar businesses, the 'arts hub' location and the lack of direct competition.

The most recurring challenge identified by the interviewed businesses relates to road congestion issues and mostly to do with traffic going in and out of Blackwall tunnel (22% of responses). Other challenges include the need for improved local amenities (9% of responses) and increased parking provision across the site (9% of responses). Improvement to the public transport links such as increasing the frequency of certain bus links were also mentioned (9% of responses). Additional issues raised were the necessity of improved river crossings, increased street lighting, better public realm and better management of waste (fly-tipping) and infrastructure.

The ties between the businesses and the Charlton Riverside location appears to be most important in terms of customer networks. When asked why they were located in Charlton Riverside and how important the location was to their business, half of businesses answered that location was key in terms of servicing neighbouring customer bases and accessing central London customer networks. This was the case across almost all business activity sectors. Other aspects of Charlton Riverside which made the location valuable to business operations included access to local staff and the size and value of space.

Page Intentionally Blank

