



# Wandsworth Housing and Economic Land Availability Assessment

January 2021

## Executive Summary

The Wandsworth Housing and Economic Land Availability Assessment provides an assessment of whether there is sufficient housing and economic land in Wandsworth to support the needs identified by the proposed London Plan and the *Wandsworth Employment Land and Premises Study 2020* for these uses. It supports the draft local plan which covers the 2023/24–2037/38 period.

The methodology builds on that used in *The London Strategic Housing Land Availability Assessment 2017* and the similar land availability assessment produced by Wandsworth Council in 2017.

The assessment identified sites throughout the borough that could potentially provide for economic and housing development. The sites were then assessed for their suitability for economic uses, housing uses, or both, and were assigned a likely development density and probability of development.

The supply of housing over the period 2023/24–2037/38 is 20,700 net dwellings, which meets the proposed London Plan 10-year housing target of 19,500 net dwellings.

The supply of land for offices over the period to 2033/34 outside the Vauxhall, Nine Elms, Battersea Opportunity Area is net 37,000m<sup>2</sup>, which meets the identified need of 22,500m<sup>2</sup>.

The supply of industrial capacity over the plan period will be finalised when the draft local plan is revised in response to consultation, in preparation the regulation 19 version, and to account for supporting documentation, such as the masterplan Supplementary Planning Document for the Wandle Delta area. There is an identified demand for core industrial uses of 5.5ha of land, which is derived from an identified floorspace need of 35,700m<sup>2</sup>, as well as up to 2.1ha of land required for waste management. The draft plan promotes industrial intensification in a variety of locations, including in the Battersea Design and Technology Quarter and the Wandle Delta area. The indicative capacity of these two areas is a total of approximately 38,400m<sup>2</sup>. The demand for waste management land is intended to be met by the local plan policies of directing this use to existing facilities, safeguarded wharves, and designated industrial sites. Initial findings suggest that identified need is likely to be met.

A list and details of the assessment of housing and offices sites has not been provided in this report. This is consistent with *The London Strategic Housing Land Availability Assessment 2017* methodology, and avoids any pre-emption of the planning application process in establishing appropriate built form and densities for sites.

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# 1 Introduction

Wandsworth Council is preparing a proposed local plan to replace the existing local plan, which consists of the Core Strategy, Development Management Policies Document and Site Specific Allocations Document (adopted in March 2016), and the Employment and Industry Document (adopted in December 2018), which updated and superseded the policies relating to those topics. The proposed plan preparation has included a review of the policies that relate to housing and economic land supply.

The 2019 *National Planning Policy Framework* ('the National Planning Policy Framework') states that strategic policy-making authorities should have a clear understanding of the land available in their area through the preparation of a strategic housing land availability assessment.<sup>1</sup> The assessment of the supply of economic land supports achieving the sustainable development objectives of the National Planning Policy Framework, including that 'sufficient land of the right types is available in the right places and at the right time to support growth'.<sup>2</sup>

This assessment identifies a supply of housing and economic land to support the proposed Local Plan.

In accordance with the NPPG, the role of the assessment is not to '*determine whether a site should be allocated for development*'<sup>3</sup>. However, recognising that there is an element of overlap between these two work streams, the findings of the HELAA (among other factors) were used to inform the process of identifying sites for allocation. Further information about the methodology pertaining to the selection and appraisal of site allocations will be presented in a relevant evidence base document.

## 2 Methodology

The *Housing and Economic Land Availability Assessment* planning practice guidance ('the guidance') sets out the methodology for undertaking a housing and economic land availability assessment.<sup>4</sup>

The guidance states that 'Plan-making bodies are expected to have regard to the guidance in preparing and updating their assessments. Where they depart from the guidance, it will be important to explain the reasons for doing so when setting out the evidence base that informs the plan.'<sup>5</sup>

This assessment generally follows both the guidance methodology and that used in the *Wandsworth Council Housing and Economic Land Availability Assessment: 2016–2031* ('the

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<sup>1</sup> *National Planning Policy Framework*, Ministry of Housing, Communities and Local Government, February 2019, <https://www.gov.uk/government/publications/national-planning-policy-framework--2>, para. 67.

<sup>2</sup> Para. 8.

<sup>3</sup> *National Planning Policy Guidance (Paragraph: 001 Reference ID: 3-001-20190722, Ministry of Housing, Communities and Local Government, Housing and economic land availability assessment, 22 July 2019, <https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment>*

<sup>4</sup> *Housing and Economic Land Availability Assessment*, Ministry of Housing, Communities and Local Government, 22 July 2019, <https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment>.

<sup>5</sup> Para. 004.

previous HELAA'), prepared in 2017 for the review carried out at that time of the local plan policies relating to employment and industrial land.<sup>6</sup>

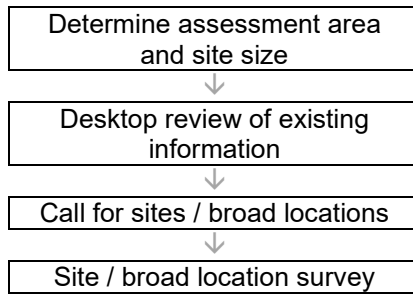
The methodology used in this assessment and any differences with the planning practice guidance methodology are explained below. An overview of the planning practice guidance methodology is shown in Figure 1, below.

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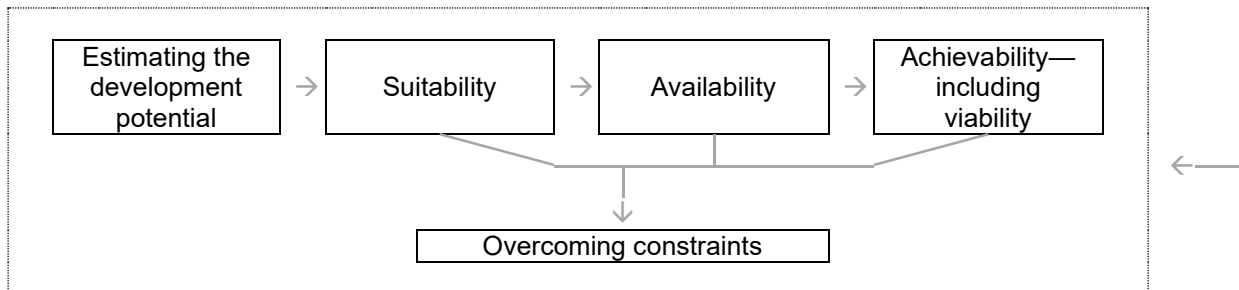
<sup>6</sup> *Wandsworth Council Housing and Economic Land Availability Assessment: 2016–2031*, October 2017, [https://www.wandsworth.gov.uk/media/1902/sd\\_012\\_housing\\_and\\_economic\\_land\\_availability\\_assessment\\_\\_october\\_2017\\_.pdf](https://www.wandsworth.gov.uk/media/1902/sd_012_housing_and_economic_land_availability_assessment__october_2017_.pdf).

Figure 1: Methodology flow chart<sup>7</sup>

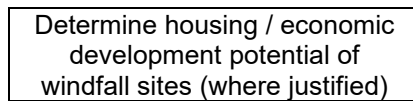
**Stage 1—Site / Broad Location Identification**



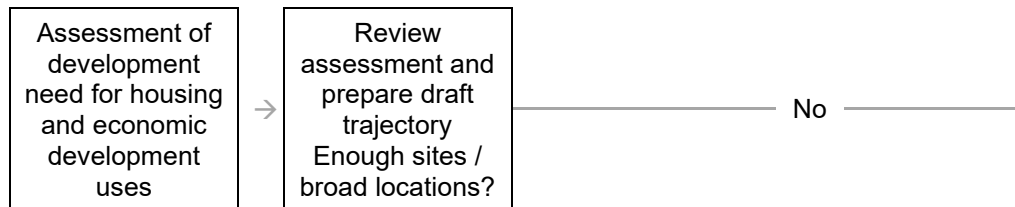
**Stage 2—Site / Broad Location Assessment**



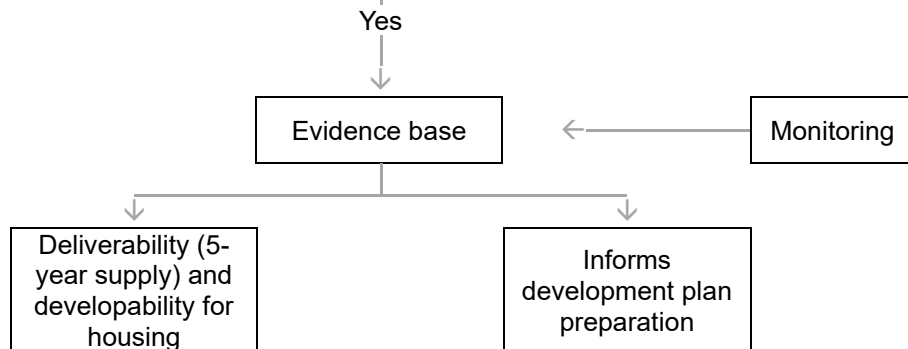
**Stage 3—Windfall Assessment**



**Stage 4—Assessment Review**



**Stage 5—Final Evidence Base**



<sup>7</sup> Replicated from para. 005 of the guidance.

## 2.1 Stage 1—Site Identification

### 2.1.1 Assessment Area

This assessment considers sites within Wandsworth borough. For housing, this aligns to Wandsworth's input of sites to *The London Strategic Housing Land Availability Assessment 2017* ('the London SHLAA').<sup>8</sup> For economic land, this aligns to the supply and demand analysis presented in the *Wandsworth Employment Land and Premises Study 2020*.<sup>9</sup>

### 2.1.2 Identification of Sites

A total of 905 sites were identified for assessment. The various sources of these sites are identified below.

#### 2.1.2.1 Previous Assessments

Sites identified through both the London SHLAA and the previous Wandsworth HELAA have been considered in the assessment. Any changes in circumstances since these reports were prepared were considered as described in section 2.2 of this report, 'Stage 2—Site Assessment'.

#### 2.1.2.2 Call for Sites

A call for sites was made between December 2018 and March 2019. To advertise this, letters were sent to people and organisations in the Council's planning consultation database and the public were also invited to submit through the Council's website details of sites that might be available for redevelopment over the lifetime of the local plan. 19 sites were identified through the responses received.

#### 2.1.2.3 Local Plan Consultation

Sites were identified through engagement with Council departments. These included sites in the Vauxhall, Nine Elms, Battersea Opportunity Area, and sites throughout the borough that the Housing department of the Council identified as having potential for housing capacity.

#### 2.1.2.4 Allocated Sites, Applications and Pre-Application Meeting Records

A large number of sites were identified from the Council's development monitoring database. This database records the proposed development details of any planning application for a change in the number of residential units or a change in non-residential floorspace.

Existing site allocations in the site allocations document<sup>10</sup> and in the Employment and Industry Document<sup>11</sup> of the adopted Wandsworth local plan were also included where they were not already under construction.

Assessment was undertaken at Stage 1 to identify the suitability of sites for development in accordance with the Planning Practice Guidance, for example the suitability of sites for development in heritage terms was assessed using the recommendations of the Urban Design Study.

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<sup>8</sup> *The London Strategic Housing Land Availability Assessment 2017: Part of the London Plan Evidence Base*, Greater London Authority, November 2017, <https://www.london.gov.uk/what-we-do/planning/london-plan/new-london-plan/strategic-housing-land-availability-assessment>.

<sup>9</sup> *Wandsworth Employment Land and Premises Study 2020*, AECOM, October 2020, [https://www.wandsworth.gov.uk/media/8006/wandsworth\\_elps\\_final\\_report.pdf](https://www.wandsworth.gov.uk/media/8006/wandsworth_elps_final_report.pdf).

<sup>10</sup> *Site Specific Allocations Document*, Wandsworth Council, December 2018, [https://www.wandsworth.gov.uk/media/3755/local\\_plan\\_site\\_specific\\_allocations.pdf](https://www.wandsworth.gov.uk/media/3755/local_plan_site_specific_allocations.pdf).

<sup>11</sup> *Employment and Industry Document*, Wandsworth Council, December 2018, [https://www.wandsworth.gov.uk/media/2433/local\\_plan\\_employment\\_and\\_industry.pdf](https://www.wandsworth.gov.uk/media/2433/local_plan_employment_and_industry.pdf).

## 2.2 Stage 2—Site Assessment

For sites from the previous HELAA and the London SHLAA, the assessment relied on those assessments, where more recent information on the sites was not available. For sites with pending or approved planning permissions, the assessment relied on Wandsworth Council's 2019/20 authority monitoring report<sup>12</sup>, which sets out annually the deliverable housing sites in Wandsworth against the adopted local plan housing targets, as required in the National Planning Policy Framework<sup>13</sup>. For other sites, estimates of development potential, suitability, availability and achievability followed the methodology set out below.

### 2.2.1 Estimate of Development Potential

Estimates for housing potential on sites used, as a starting point, the 'sustainable residential quality density matrix' set out in Policy 3.4 of the current London Plan.<sup>14</sup> While the proposed London Plan<sup>15</sup> does not have a similar matrix, instead including Policy D3 on optimising site capacity through a design-led approach, the London SHLAA also used the density matrix as a starting point for site capacity assessment and it provides a useful starting point that can be calculated for a large number of sites efficiently. The estimates used are indicative for the sites without planning permission and do not give a definitive number of units to be provided on site as the ultimate capacity will be determined by the assessment of a planning application.

Estimates for economic uses were initially based on assumptions of building height from the draft local plan policies, site coverage of 50–80%, and a vertical mix of residential and economic uses, usually assuming at least one floor of economic uses for the sites.

Where a site was subject to a planning permission, application or pre-application meeting record, densities or levels of development were taken from these. In addition, Appendix A of the *Urban Design Study*<sup>16</sup> provides density scenarios for some sites allocated in the proposed plan and site assessments in the draft masterplan for the Wandle Delta area, currently under preparation by Wandsworth Council, provided existing and potential site capacity.

### 2.2.2 Suitability, Availability and Achievability

A judgement was formed on whether development on each site is likely to be viable and when it would likely come forward for development. Sources of information supporting this judgement included:

- (1) The draft masterplan for the Wandle Delta area, currently under preparation by Wandsworth Council;
- (2) Pre-application records;

<sup>12</sup> *Wandsworth Local Plan—Authority Monitoring Report 2019/20: Housing Policy Performance Report—Summary Tables*, 5 November 2020, <https://www.wandsworth.gov.uk/media/7680/housing-trajectory-and-summary-tables-20201105.xlsx>.

<sup>13</sup> Para 73.

<sup>14</sup> *The London Plan: The Spatial Development Strategy for London Consolidated with Alterations since 2011*, Greater London Authority, January 2017, [https://www.london.gov.uk/sites/default/files/the\\_london\\_plan\\_2016\\_jan\\_2017\\_fix.pdf](https://www.london.gov.uk/sites/default/files/the_london_plan_2016_jan_2017_fix.pdf).

<sup>15</sup> *The London Plan: Publication London Plan: December 2020: The Spatial Development Strategy for Greater London*, Greater London Authority, December 2020, [https://www.london.gov.uk/sites/default/files/the\\_publication\\_london\\_plan\\_2020\\_-\\_clean\\_version\\_0.pdf](https://www.london.gov.uk/sites/default/files/the_publication_london_plan_2020_-_clean_version_0.pdf).

<sup>16</sup> *Wandsworth Borough Council: Urban Design Study: Characterisation, Development Capacity and Design Guidance*, Arup, 24 December 2020, [https://www.wandsworth.gov.uk/media/8075/urban\\_design\\_study.pdf](https://www.wandsworth.gov.uk/media/8075/urban_design_study.pdf).



- (3) The call for sites; and
- (4) Knowledge of the site and landowner intentions and propensity to develop the land.

As the proposed plan policies are finalised, further review, site by site, of the housing and economic capacity will be undertaken to account for any changes which may be required as a result of new evidence or policies relating to:

- (1) Physical constraints based on GIS hazard, constraint and policy layers in the local plan;
- (2) Built form and building heights;
- (3) Heritage and sensitivity to growth (based on on-site or adjacent designated assets, and findings of the Urban Design Study); and
- (4) Ownership, based on known constraints.

### 2.2.3 Timescales for Development

Estimated timescales for housing development were assigned to the phases used in the London SHLAA, for comparability:

- (1) 2019/20–2023/24;
- (2) 2024/25–2028/29;
- (3) 2029/30–2033/34; and
- (4) 2034/35–2040/41.

Development phasing was then annualised to each year between 2019/20 and 2039/40 inclusive, to allow for comparison to the proposed plan period of 2023/24 to 2037/38.

For offices and industrial, the timescales for development include all development expected from the end of 2019/20 to 2033/34, for consistency with the period of the *Wandsworth Employment Land and Premises Study*, 2019–2034.

### 2.2.4 Non-Self-Contained Accommodation

The assessment followed the ratios for measuring the contribution of non-self-contained accommodation set out in the proposed London Plan, set out in Table 1, below.

Table 1: Ratio for counting non-self-contained accommodation towards self-contained dwelling targets<sup>17</sup>

Room Type	Ratio for Counting towards Self-Contained Dwelling Targets
Student	2.5 : 1
Care Home	1.0 : 1
Other	1.8 : 1

## 2.3 Stage 3—Windfall Assessment

The National Planning Policy Framework states that where there is an allowance for windfall sites, those sites not specifically identified in the development plan, to form part of anticipated supply, 'Any allowance should be realistic having regard to the strategic housing land availability assessment, historic windfall delivery rates and expected future trends.'<sup>18</sup>

The assessment adopted the London SHLAA approach of a threshold of less than 0.25ha to classify sites as 'small sites'. The proposed London Plan includes explanatory text that its small sites target, as set out in Table 4.2 of the plan, 'can be taken to amount to a reliable

<sup>17</sup> *The London Plan: Publication London Plan: December 2020*, para. 4.1.9.

<sup>18</sup> Para. 70 and Annex 2.

source of windfall sites which contributes to anticipated supply and so provides the compelling evidence in this respect required by paragraph 70 of the National Planning Policy Framework of 2019'.<sup>19</sup>

To avoid double-counting of known permissions and the windfall, the first three years of the assessment did not include a small sites windfall. However, these years are outside the plan period, so each year of the plan period includes the small sites windfall from the proposed London Plan small sites target. For Wandsworth, this is 4,140 over the 10-year target, annualised to 414 net dwellings per year.

While the summary methodology diagram from the planning practice guidance shown in Figure 1 includes reference to economic development sites windfall, there is no further reference to this in the text of the guidance. To date Wandsworth Council has not undertaken monitoring of expected versus actual economic land development, and so there is no historic data on which to predict a suitable windfall allowance. Comparisons of actual development over the next fifteen years with the results of this assessment will usefully inform future economic land availability assessments.

## 2.4 Stage 4—Assessment Review

A probability score was assigned to each site coming forward. The total likely development over time was compared to the demand for economic uses set out in the *Employment Land and Premises Study*, and, for housing, to the housing requirements in the proposed London Plan.

## 2.5 Stage 5—Evidence Base

A detailed list of sites was produced, cross-referenced to maps of the site boundaries, with details of the assessment of each site, and projected delivery of housing or economic uses over time.

The list of sites or their estimated development capacities has not been publicly made available. This is consistent with the London SHLAA methodology, and avoids any pre-emption of the planning application process in establishing appropriate built form and densities for sites. The assessment looks to indicate the broad capacity for residential and economic uses across all potential sites and does not allocate particular sites for particular forms of development.

Summary tables of the site capacities are set out in section 3 and Appendix A of this report. Information on sites with approved or pending planning permissions is also available in the 2019/20 authority monitoring report.<sup>20</sup>

# 3 Site Assessment Summary

The results of the housing, office and industrial land availability assessment is summarised below. Note that in the tables, for clarity, the number of net dwellings is rounded to the nearest 10 dwellings and net floorspace to the nearest 100m<sup>2</sup>, and totals may not sum due to this rounding.

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<sup>19</sup> Para. 4.2.3.

<sup>20</sup> Available at <https://www.wandsworth.gov.uk/media/7680/housing-trajectory-and-summary-tables-20201105.xlsx>.

### 3.1 Housing

The housing supply identified through the assessment is summarised in Table 2, below.

Table 2: Housing supply (net dwellings) over the plan period

<b>Site Size</b>	<b>Years 1–5 (2023/24–2027/28)</b>	<b>Years 1–10 (2023/24–2032/33)</b>	<b>Years 1–15 (2023/24–2037/38)</b>
Large Sites	11,290	16,110	19,220
Small Sites	450	460	460
Small Sites Windfall	2,070	4,140	6,210
<b>Total</b>	<b>13,820</b>	<b>20,700</b>	<b>25,890</b>

Table 2 shows that the proposed London Plan target for Wandsworth of 19,500 net dwellings over 10 years<sup>21</sup> would be met by the 20,700 net dwellings expected to be delivered over years 1–10 of the proposed local plan period, assuming the 19,500 target is annualised to 1,950 and then rolled forward each year for the period beyond the 2019/20–2028/29 London Plan target.

Although the supply is currently forecast to be lower in years 6–10 and 11–15 relative to years 1–5, assuming all 20,700 dwellings are completed in the first 10 years of the proposed plan period, the borough is on course to meet and possibly exceed the 2023/24–2032/33 housing target. This forecasted exceedance over the 10 years of the target provides a buffer that is consistent with the approach in the National Planning Policy Framework of including a buffer of housing land supply to ensure flexibility in sites coming forward is accounted for.<sup>22</sup> This is particularly relevant where a change in the development rate of a small number of large sites could make a big difference to housing delivery in Wandsworth. For example, as shown in Table 8 in Appendix A of this report, the Vauxhall, Nine Elms, Battersea Opportunity Area, which almost completely comprises large, brownfield sites, is expected to contribute to one-third of the borough's housing delivery.

For the whole, 15-year plan period, the 25,890 net dwellings shown in Table 2 fall short of the 29,250 that would be required by the London Plan (based on annualising the 19,500 10-year target to 1,950 and then multiplying by 15 years). However, the National Planning Policy Framework requires specific, developable sites or broad locations for growth to be identified only 'where possible',<sup>23</sup> it is difficult to predict with great certainty this far ahead, and over time additional sites that are not currently available or viable are expected to come forward for development. Also, the figures and targets will be revised when the next Local Plan is commenced and the London Plan is reviewed. For these reasons, the shortfall in total for years 1–15 is not significant and did not require a review of the site assessments.

Table 3, below, summarises that 142% of the 5-year housing supply requirement of the National Planning Policy Framework<sup>24</sup> is met, and this clearly provides for the required 5% buffer to ensure choice and competition in the market for land.

Table 3: 5-year housing supply

<b>Supply</b>	13,820 net dwellings
<b>Target</b>	9,750 net dwellings
<b>Percentage Met</b>	142%

<sup>21</sup> Table 4.1, p. 175.

<sup>22</sup> Para. 73 of the National Planning Policy Framework requires a 5% buffer to be included in the annual identification of a five-year supply of housing.

<sup>23</sup> Para. 67.

<sup>24</sup> Para. 67 and 73.

The housing supply for the full period of the assessment is set out in Table 4, below.

Table 4: Housing supply (net dwellings) over the full assessment period

Site Size	Before Plan Period (2020/21–2022/23)	Years 1–5 (2023/24–2027/28)	Years 6–10 (2028/29–2032/33)	Years 11–15 (2033/34–2037/38)	After Plan Period (2038/39–2039/40)
Large Sites	6,710	11,290	4,810	3,120	770
Small Sites	1,280	450	0	0	0
Small Sites Windfall	410	2,070	2,070	2,070	830
<b>Total</b>	<b>8,400</b>	<b>13,820</b>	<b>6,880</b>	<b>5,190</b>	<b>1,600</b>

Tables showing a breakdown of Table 2 and Table 4 by policy area (as per the proposed local plan) are shown in Appendix A.

A trajectory illustrating the expected rate of housing delivery over the plan period is shown in Figure 2, below. While after the first 5 years of the trajectory supply is shown lower than the annualised target, the managed annualised target (which takes into account projected completions above the housing target) reaches 0 over the 10 years of the trajectory, showing that the 10-year housing target is met.

Figure 2: Housing trajectory

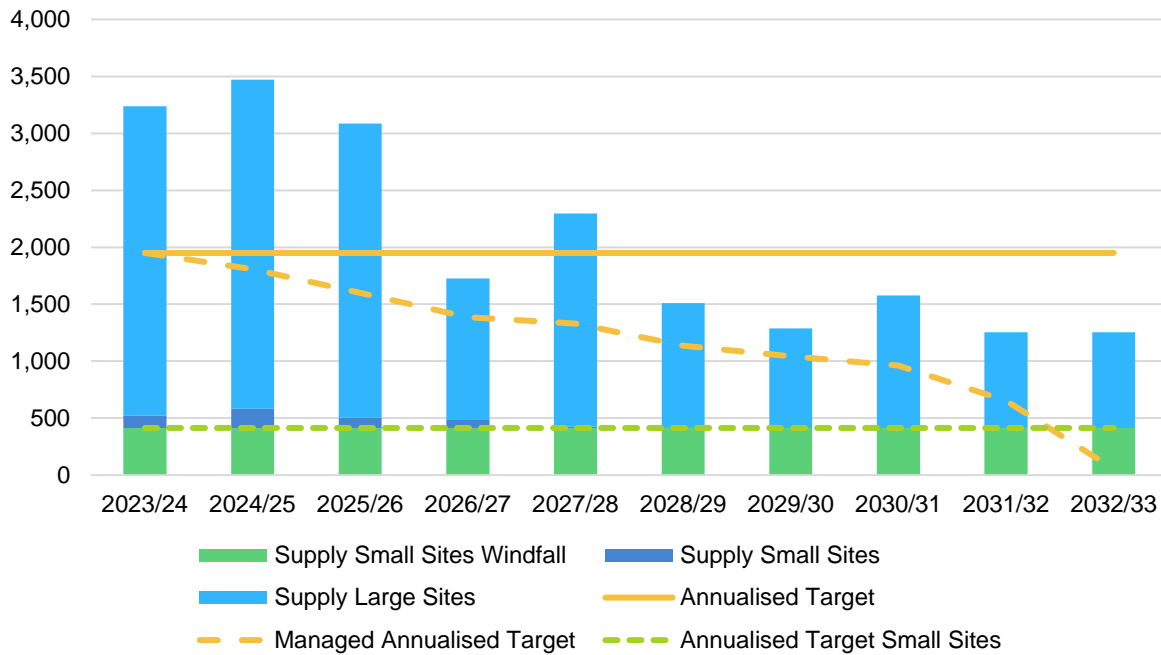


Figure 2 also shows the contribution of small sites: in the first few years of the trajectory, knowledge of existing permissions provides a small source of supply in addition to the small sites windfall.

### 3.2 Offices

The *Employment Land and Premises Study* separates its analysis of demand for offices in Wandsworth into two property markets, the Vauxhall, Nine Elms, Battersea Opportunity Area ('VNEB') and the rest of the borough. The supply identified by the assessment is below compared to the demand identified in the *Employment Land and Premises Study*.

### 3.2.1 Vauxhall, Nine Elms, Battersea Opportunity Area

The additional supply of offices expected to be delivered in the Wandsworth area of VNEB is shown in Table 5, below.

Table 5: Net additional office floorspace (m<sup>2</sup>) in VNEB

Policy Area	Planning Applications	Prior Approvals	Potential Sites	Total
Strategic Industrial Locations excluding Battersea Design and Technology Quarter	0	0	0	0
Battersea Design and Technology Quarter	0	0	60,800	60,800
Focal Points	147,900	0	0	147,900
Rest of Vauxhall, Nine Elms, Battersea Opportunity Area	69,800	0	3,300	73,100
<b>Total</b>	<b>217,700</b>	<b>0</b>	<b>64,100</b>	<b>281,800</b>

The 281,800m<sup>2</sup> expected to be delivered differs from the 205,000m<sup>2</sup> of 'planned supply' identified in the *Employment Land and Premises Study*.<sup>25</sup> Table 5 provides an update to the 205,000m<sup>2</sup> referenced in the *Employment Land and Premises Study*, as permissions and applications as at the end of 2019/20 and identified sites are included in the supply calculation, as explained in section 2 of this report. In addition, this is not considered an over supply of offices space in VNEB as the biggest sources of this supply are from planning applications, indicating a high level of demand in this location. The second biggest source is the potential sites identified in the Battersea Design and Technology Quarter, which has been informed by an *Economic Appraisal and Design Framework* study<sup>26</sup>, including extensive engagement with local stakeholders.

### 3.2.2 Rest of the Borough

The additional supply of offices expected to be delivered outside VNEB is shown in Table 6, below.

Table 6: Net additional office floorspace (m<sup>2</sup>) outside VNEB

Policy Areas	Planning Applications	Prior Approvals	Potential Sites	Total
Local Centres	200	0	0	200
Town Centres	3,100	-400	10,400	13,100
Economic Use Intensification Areas excluding Town Centres	12,300	0	-5,200	7,000
Economic Use Protection Areas excluding Local Centres	2,200	-5,400	2,600	-600
Focal Points excluding Town Centres	14,900	-10,600	0	4,300
Strategic Industrial Locations	0	0	0	0
Locally Significant Industrial Areas	3,000	-500	0	2,500
Rest of Borough	11,600	-1,400	400	10,600
<b>Total</b>	<b>47,300</b>	<b>-18,400</b>	<b>8,200</b>	<b>37,000</b>

The *Employment Land and Premises Study* identifies a net requirement for office floorspace of 22,500m<sup>2</sup>.<sup>27</sup> The 37,000m<sup>2</sup> of supply identified in Table 6 meets this requirement.

<sup>25</sup> Para. 2.54.

<sup>26</sup> *Battersea Design & Tech Quarter: Economic Appraisal & Design Framework*, We Made That, 10 February 2020, [https://www.wandsworth.gov.uk/media/6123/battersea\\_design\\_and\\_tech\\_quarter\\_we\\_made\\_that\\_framework.pdf](https://www.wandsworth.gov.uk/media/6123/battersea_design_and_tech_quarter_we_made_that_framework.pdf).

<sup>27</sup> Table 7.1, p. 116.

### 3.3 Industrial

The *Employment Land and Premises Study* identifies a current total of 133.6ha of industrial land in Wandsworth, comprising 68.9ha of occupied core industrial land, 63.3ha of wider industrial land, and 1.4ha of vacant industrial land. It forecasts a net requirement for 8.6ha of additional industrial land, as shown in Table 7, below.

Table 7: Supply/demand balance for industrial land 2019–2034<sup>28</sup>

		Land (ha)
<b>Supply</b>	A Total core and wider industrial land (2019)	133.6
	B Occupied core industrial land (2019)	68.9
	C Current vacant industrial land	1.4
	D Land equivalent of vacant Industrial floorspace (2%)	1.4
	E Total industrial land (2019)	71.7
<b>Demand</b>	F Land demand to 2034	5.5
	G Additional demand for utilities, transport and waste management to 2034	2.1
	H Optimum frictional vacant land at 2034 (5% of B + F + G)	3.8
	I Excess vacant land: optimal levels of frictional land minus existing vacant industrial land (H – C – D)	1.0
	J Gross requirement for industrial land 2019–2034 (E + F + G + I)	80.3
	K Net requirement for industrial land 2019–2034 (J – E)	<b>8.6</b>

To meet the forecast demand of core industrial uses, supply would need to increase by 5.5ha. The additional land need identified in the *Employment Land and Premises Study* is derived from an identified additional floorspace need of 35,700m<sup>2</sup>.<sup>29</sup> The borough also requires up to 2.1ha of land to meet its waste requirements and 1ha of land to meet the additional surplus land required (5% of the borough's total stock) to enable the efficient churn of occupiers in the industrial land market.<sup>30</sup>

The draft local plan acknowledges the requirement for additional industrial land, and incorporates policies intended to protect existing industrial land and to intensify industrial uses where appropriate as part of a plan-led approach on existing sites. In particular, the draft local plan promotes industrial intensification within the Battersea Design and Technology Quarter (BDTQ) and within the draft masterplan for the Wandle Delta area. The *Battersea Design & Tech Quarter: Economic Appraisal & Design Framework* study has identified an indicative site capacity of approximately 24,200m<sup>2</sup> of additional industrial floorspace.<sup>31</sup> Initial site assessments as part of the draft masterplan for the Wandle Delta area have identified an indicative site capacity of approximately 14,200m<sup>2</sup> of additional industrial floorspace. The combined capacity is approximately 38,400 m<sup>2</sup>. It is noted that both policy approaches are currently in the early stages of development, and further work concerning the development capacity of these areas will be undertaken and published within future iterations of this document in accordance with the processes set out within section 2.2.2, 'Suitability, Availability and Achievability'.

In accordance with the proposed London Plan, new waste capacity will be directed towards existing facilities, safeguarded wharves, and designated Strategic Industrial Locations and Locally Significant Industrial Areas.

<sup>28</sup> Adapted from Table 7.2 of the *Employment Land and Premises Study*.

<sup>29</sup> Table 6.13, p. 114.

<sup>30</sup> *Employment Land and Premises Study*, Table 7.2, p. 118.

<sup>31</sup> P. 47.

The supply of industrial capacity over the plan period will be finalised when the draft local plan is revised in response to consultation, in preparation for the regulation 19 version, and to account for supporting documentation, such as the masterplan Supplementary Planning Document for the Wandle Delta area.

## 4 Conclusion

The housing and economic land availability assessment has assessed potential sites in the borough and their expected future land use, density and timescale for development.

The assessment shows that the needs for housing and office floorspace can be met.

The supply of industrial capacity over the plan period will be finalised and reported on for the regulation 19 version of the local plan, accounting for updates to the supporting information, but initial findings are that it is also likely to be met.

## Appendix A Additional Housing Supply Tables

Table 8: Housing supply (net dwellings) over the plan period by policy area

Site Size	Policy Area	Years 1–5 (2023/24– 2027/28)	Years 1–10 (2023/24– 2032/33)	Years 1–15 (2023/24– 2037/38)
<b>Large (0.25ha or larger)</b>	Balham	0	50	120
	Clapham Junction	950	1,700	2,950
	Nine Elms	6,040	6,740	6,790
	Putney	170	170	180
	Roehampton	420	1,000	1,150
	Tooting	110	400	720
	Wandsworth	1,690	3,460	4,150
	Rest of Borough	1,910	2,580	3,160
	Windfall	0	0	0
	<b>Total</b>	<b>11,290</b>	<b>16,110</b>	<b>19,220</b>
<b>Small (less than 0.25ha)</b>	Balham	10	10	10
	Clapham Junction	10	10	10
	Nine Elms	20	20	20
	Putney	10	10	10
	Roehampton	0	0	0
	Tooting	20	20	20
	Wandsworth	10	10	10
	Rest of Borough	380	380	380
	Windfall	2,070	4,140	6,210
	<b>Total</b>	<b>2,520</b>	<b>4,600</b>	<b>6,670</b>
<b>Total (all site sizes)</b>	Balham	10	60	130
	Clapham Junction	960	1,710	2,960
	Nine Elms	6,060	6,750	6,810
	Putney	180	180	190
	Roehampton	420	1,000	1,150
	Tooting	140	430	750
	Wandsworth	1,700	3,470	4,160
	Rest of Borough	2,290	2,960	3,540
	Windfall	2,070	4,140	6,210
	<b>Total</b>	<b>13,820</b>	<b>20,700</b>	<b>25,890</b>



Table 9: Housing supply (net dwellings) over the full assessment period by policy area

Site Size	Policy Area	Before Plan Period (2020/21–2022/23)	Years 1–5 (2023/24–2027/28)	Years 6–10 (2028/29–2032/33)	Years 11–15 (2033/34–2037/38)	After Plan Period (2038/39–2039/40)
<b>Large (0.25ha or larger)</b>	Balham	30	0	50	70	30
	Clapham Junction	180	950	750	1,250	230
	Nine Elms	4,830	6,040	690	50	30
	Putney	50	170	10	10	0
	Roehampton	0	420	580	150	60
	Tooting	40	110	290	320	130
	Wandsworth	850	1,690	1,780	690	90
	Rest of Borough	740	1,910	660	580	200
	Windfall	0	0	0	0	0
<b>Total</b>	<b>6,710</b>	<b>11,290</b>	<b>4,810</b>	<b>3,120</b>	<b>770</b>	
<b>Small (less than 0.25ha)</b>	Balham	30	10	0	0	0
	Clapham Junction	60	10	0	0	0
	Nine Elms	50	20	0	0	0
	Putney	10	10	0	0	0
	Roehampton	0	0	0	0	0
	Tooting	70	20	0	0	0
	Wandsworth	130	10	0	0	0
	Rest of Borough	930	380	0	0	0
	Windfall	410	2,070	2,070	2,070	830
<b>Total</b>	<b>1,690</b>	<b>2,520</b>	<b>2,070</b>	<b>2,070</b>	<b>830</b>	
<b>Total (all site sizes)</b>	Balham	60	10	50	70	30
	Clapham Junction	240	960	750	1,250	230
	Nine Elms	4,890	6,060	690	50	30
	Putney	60	180	10	10	0
	Roehampton	0	420	580	150	60
	Tooting	110	140	290	320	130
	Wandsworth	970	1,700	1,780	690	90
	Rest of Borough	1,670	2,290	670	580	200
	Windfall	410	2,070	2,070	2,070	830
<b>Total</b>	<b>8,400</b>	<b>13,820</b>	<b>6,880</b>	<b>5,190</b>	<b>1,600</b>	