

A yellow map of the Thames Estuary area is visible in the background, showing the coastline and major waterways. The text is overlaid on this map.

THAMES ESTUARY PRODUCTION CORRIDOR

Road Map
for Growth:
Fashion
Design and
Manufacturing



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Forewords

Justine Simons OBE

London's Deputy Mayor for Culture and the Creative Industries

Fashion has been part of the estuary's story for centuries, from 14th century dye works on the River Lea to the Rag Trade to east London's Fashion District today.

Creating world class cultural infrastructure will bring huge opportunities to the region and for everyone living and working within it – for economic growth, for new employment and to reaffirm the Thames Estuary as a place of making and creating. Fashion is a central part of that story, with new designers moving to the area and opportunities for fashion manufacturing to develop.

This is also a great moment to drive positive change in the sector, catching the wave of self-reflection by the industry and consumers on fast fashion, sustainability, reducing textile waste and the carbon footprint of our clothes.

We are already seeing leadership in sustainability from Hackney Wick and Fish Island's ReRoute, reducing waste and emissions to Elvis & Kresse's brilliant collection of accessories and homeware from rescued materials. The estuary is also home to world class fashion education including UCA, London College of Fashion now in their East Bank campus and South Essex College's unique industry partnerships at High House Production Park.

The Mayor of London is committed to supporting London's dynamic fashion industry through grant funding, new workspaces and by commissioning research. We support London Fashion Week which generates £50m per year for British designers, many of which are small businesses. Our Good Growth Fund helped to deliver affordable fashion workspace in

east London. The Mayor also funded the innovative tech startup Pattern Project, to develop an on-demand manufacturing system at the ApparelTASKER factory in Tower Hamlets. All of this is supporting and driving a period of creative growth and dynamism across East London.

The power of the Thames Estuary Production Corridor is the strength of our partnerships, harnessing this dynamism and working to build an inclusive, ethical, and innovative fashion ecosystem as a blueprint for others to follow. With a focus on achieving net zero, we will enable local supply chains to create a greener, more efficient circular economy.

“The Thames Estuary Production Corridor's fashion ecosystem must be diverse and innovative, driven by local talent.”

We always travel best with the help of a good guide, and this Road Map for Growth shows how partners, estuary leaders and the creative sector can use assets, expertise and infrastructure to unlock local growth. Creative industries are essential to the estuary's future and will be a key part of the lives of the communities living and working here.

By growing our partnerships and working together we can achieve our vision to build the world's largest creative production ecosystem. It's my pleasure to invite you to join us.



Poplar Works, part of the Fashion District



Chatham, Medway

Kate Willard OBE

Thames Estuary Envoy and Chair

As Government-appointed Thames Estuary Envoy, I am a proud supporter of projects that will deliver our Thames Estuary ambition to be a world-leading region for the arts, creativity and cultural production.

“The Thames Estuary Production Corridor shares our Thames Estuary Growth Board ambitions. The sector presents further huge opportunities – and with investment to support it, we can together make this happen.”

It's amazingly exciting to see already the fashion sector's growth potential through innovation, new fashion technology and R&D. Not to mention a sharp focus on talent development, circular economy practices and smart use of the Thames Estuary's capacity to develop more responsive and connected supply chains.

At the same time, we know the sector faces challenges around skills and talent development, which are challenges investors will want to see solved. Through the fairness agenda, we will support the work in place to develop the local and diverse workforce the sector needs to build capacity and attract investment, businesses and talent. We will spread this opportunity across the estuary.

Working together, we will realise the sector's exciting growth potential through the support of new projects, new partnerships, new sector specific and digital infrastructure and by promoting our brilliant sector assets. The Thames Estuary Growth Board will be flying the flag for cultural production to investors and to Government, showcasing the estuary as the UK's number one growth opportunity.

As the Thames Estuary Production Corridor and our work together continues to grow, it will generate new jobs, nurture local talent, level up British making and manufacturing and attract new investment. It will enhance the Thames Estuary's leading reputation as a successful and inspiring place to live, work and innovate.

Imagine yourself at the top of St Paul's Cathedral facing east, looking over this incredible landscape that has inspired artists as wide-ranging and wonderful as Canaletto, Turner, Dickens and Dr Feelgood. Reaching out from London to the sea, and from the sea to the world beyond, the Thames Estuary is a dynamo of global reach, creativity, industry and opportunity.

We know that culture and the creative industries will continue to play an increasingly important role in the Thames Estuary's growth story. This Road Map shows how you can be a part of this story, one powered by the Thames Estuary Production Corridor and a stronger, greener and inclusive cultural production community.

My call to action is simple – join us.

Sarah Dance

Chair of South East Local Enterprise Partnership

The Thames Estuary's rapidly growing cultural production network comprises fashion designers and fabricators, dance schools and digital production houses, music and media facilities – all the building blocks of the UK's creative and cultural economy. We know that the region has seen encouraging growth in the fashion design and manufacturing sector over the last five years, building upon a proud heritage of creation, invention and manufacture. Together, we are evolving the estuary's legacy landscapes of industry and trade into a 50-mile corridor of culture-creation facilities.

Through the Thames Estuary Production Corridor research commission so much has been learned about the spaces and infrastructure available within towns and cities across the estuary to support growing cultural ecosystem. Thames Estuary Production Corridor has worked with borough partners to explore in detail how cultural production fits into their local profile to help create jobs and sustainable growth. This Road Map for Growth represents the next phase of that work, laying out the steps needed to meet that demand and how you can harness the sector's momentum for the benefit of local communities, our economy and the region's long term future.

This in turn can support emerging talent, community development and employment opportunities across the sector, from design and manufacturing to retail, distribution and marketing.

To back this up, the Thames Estuary Production Corridor research commission has set out the strategy to help unlock investment and support sustainable growth and recovery in the region. By developing specialist affordable workspaces, textile recycling and upcycling, micro factories as well as R&D and fashion tech and innovation spaces we can build capacity and offer new solutions to the industry's challenges.

While east London's Fashion District provides a hub for London's fashion sector, there's still a need to knit together the many 'micro-clusters' and their supply chains across the estuary. By doing this we can build capacity, develop a stronger network and work towards a fashion sector in the estuary which is truly stronger than the sum of its parts.

“The Thames Estuary provides a unique opportunity to champion a future focused fashion sector built on ethical, environmental and circular economy principles.”

Successful cultural infrastructure needs the support of many sector players; policy makers, educators, planners, investors as well as the creative sectors themselves. You can be part of this growth story by joining the growing cultural production community. This Road Map for Growth will help to drive that work forwards to position the Thames Estuary as the centre of cultural production for Britain's creative industries.



Sun Pier House, Medway



ApparelTASKER, Tower Hamlets

The Thames Estuary Production Corridor is a significant programme uniting east London, the North Kent Coast and South Essex to build on the strength of the creative economy in the region. The goal is to create a world-class centre for creative and cultural production.

The programme brings together local councils, developers, fashion industry leaders, institutions, businesses, education providers and community organisations. Together, we are working to secure a future for the South East as the place to create.

Shared growth through cultural production

Why here?

The Thames Estuary is backed by Government as the UK's biggest growth opportunity. The region has the potential to create 1.3 million jobs and add £190 billion to the nation's economy by 2050. The Thames Estuary is home to film studios and fabricators, dance schools and digital production houses, music and media facilities – all the building blocks of the UK's creative and cultural economy. The Thames Estuary Production Corridor harnesses this strong base.

Why is it important?

It's a way for partners in the Thames Estuary region to work together to achieve something that is bigger than the sum of its parts – involving 18 local authorities, key sector organisations, education, business and communities.

The creative economy is growing nationally. The Thames Estuary Production Corridor is a way to secure this growth locally and connect residents to its benefits.

Research shows that the Thames Estuary has the potential to double its creative production economy, creating 50,000 jobs, generating £3.7bn for the UK economy and becoming the UK's largest concentration of creative production. The Thames Estuary Production Corridor is a way to meet this potential and ensure that a wide range of people and places benefit.

The Thames Estuary Production Corridor will also help to build more creative places – finding new uses for our high streets, town centres and neighbourhoods, rejuvenating places through culture-led investment.

What is at stake without the programme?

Demand goes elsewhere: There is demand for more cultural production space and skills in the Thames Estuary. If we don't respond, we risk it going elsewhere – losing out on investment, jobs and talent development.

Missing net zero opportunities: Without focused, shared effort, the estuary will not grow in a way that meets pressing net zero targets.

Dampening innovation and skills development:

Without building new cultural production infrastructure, we lose the chance to lead innovation in production techniques and people across the estuary lose opportunities to apply or develop their skills to take part in this economy.

Losing out on diverse talent: Without a commitment and joined up action to attract and retain a more representative workforce, there is a risk that the creative economy grows in a way that does not represent or benefit all of the estuary's communities.

Jeopardising the UK's global position: To remain competitive, the UK's creative and cultural economy needs to be at the vanguard of cluster development. Without proactive leadership, the UK risks losing ground to its global competitors.



Fashion District Festival, Spitalfields



The Factory and Silver Building, east London

Using this road map

The evidence in this road map shows what cultural production can deliver as a model for local and regional growth. Since the Thames Estuary Production Corridor vision emerged in 2017, there has been major investment in cultural production from both the public and private sector. With a series of state of the art creative and cultural production centres in the pipeline, now is the time to build on momentum and cement the Thames Estuary's leading role in cultural production nationally and globally.

This road map is a tool for local leaders across industry, policy, planning and development to deliver cultural infrastructure that enriches communities and places. The document sets out the estuary's fashion design and manufacturing landscape, highlighting what the sector is already delivering, and what the opportunities for growth are.

It supports case making, attracting new investment and strategic planning for cultural production across the estuary.

This road map is part of a bigger package of tailored support and guidance available through the Thames Estuary Production Corridor and our partners for policy makers, sector organisations, operators, educators, investors and communities of all kinds looking to find a place in the estuary's growing cultural production ecosystem.

The Thames Estuary Growth Board Plan, 'The Green Blue', provides further context for the opportunities set out in this road map - setting out how the Thames Estuary will transform through harnessing the power of the Thames, improving infrastructure and becoming a hub for creative programmes.

Supported by the Thames Estuary Growth Board and the forward-thinking Creative Estuary programme, this road map sets out how, together, we can deliver real change for the estuary by:

- Attracting investment
- Promoting our assets: Land, workforce, institutions
- Unleashing space
- Transforming our approach to sustainable development

Fashion is unique in the way it influences society. It spans innovation, creativity, culture and self-expression. Fashion production is a growing sector but it can be scaled up even further and is well placed to drive innovation specialisms and skills in the process.

At the same time, the industry is facing sustainability challenges. It must become greener and fairer to power wider change and benefit society. For estuary leaders, this is the moment to nurture fashion's green shoots across the region and power up sustainable growth.

Priorities for fashion design and manufacturing in the Thames Estuary Production Corridor

Micro-clustering and circularity: Seed, grow and nurture fashion micro-clusters, knitted together through circular and ethical practices.

Champion ethical, environmental and circular economy principles, creating a fair and equitable fashion ecosystem. Providing a radical sustainability blueprint for change.

Innovation and skills: Drive synergies across tech, craft, waste and resources, education and skills.

Develop fashion production infrastructure with innovation, and skills in mind. It will be a testbed for new ideas too.

Placemaking and community development: Create opportunities for future talent through skills, community development and rejuvenating places.

Embed fashion within the estuary's places, engage local people and promote placemaking.



ApparelTASKER, Tower Hamlets

Why grow the fashion production sector here?

Rich fashion and craft heritage and expertise

East London has a rich and vibrant heritage in fashion and craft. It is part of why London is world-renowned as a capital of style. Its entrepreneurs, skills development support programmes, and R&D activities are driving fashion production across London, and beyond in north Kent and south Essex.

A dynamic creative supply chain and latent capacity

The Thames Estuary Production Corridor is packed full of convergent creative sector businesses in related industries, including film & TV, software development, publishing, creative services and music. It is also home to a large pool of creative and mobile freelancers.

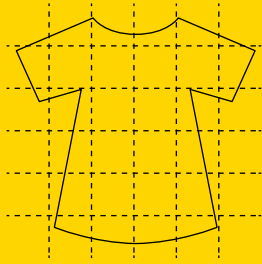
Sites to build capacity and an investable, coherent and responsive supply chain

The Thames Estuary Production Corridor benefits from good connectivity and £2.5bn investment in world-class manufacturing and logistics. It also has a range of available and cheaper commercial and industrial sites where fashion production could be seeded.

Skills for growth and innovation

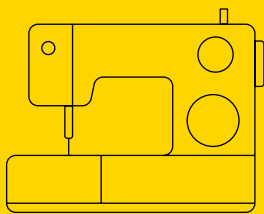
The Thames Estuary Production Corridor hosts a dynamic network of education institutions to skill up students to work in the fashion industries. They can also create new pathways, partnerships and collaboration models to address skills gaps, focused on sustainability, technology and high-value design and manufacturing.

Fashion production in the Thames Estuary is:



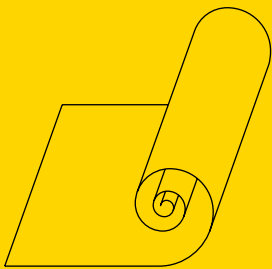
Fashion design

Fashion design is about creating new clothing and accessories. This includes sketching designs, making sample garments and sourcing materials and fabrics. Driven by east London's dynamism, the Thames Estuary Production Corridor's fashion sector has a glowing international reputation for creating talents with distinctive design identities. Fashion design is also present in Kent and Essex, mainly through micro-businesses and SMEs supported by a growing pool of freelancers.



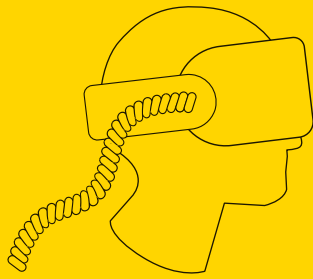
Fashion manufacturing

Fashion manufacturing has changed rapidly over the last 50 years. It remains a strong specialism east of London and is growing and changing towards more innovative, ethical and sustainable practices. Fashion manufacturing in the Thames Estuary Production Corridor relies on expert craftsmanship and knowledge tied to a rich fashion and craft heritage.



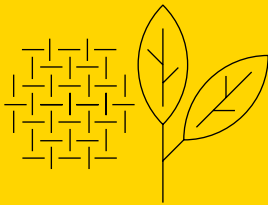
Textile wholesale and distribution

The textile market in the Thames Estuary Production Corridor is made of many small and micro-trading businesses, and a few larger companies. There is a cluster of businesses in and around the East End. Its textile industry can be traced to the 14th century when Flemish artisans set up dye works on the River Lea. The textile market is very broad, reflecting the area's diverse communities.



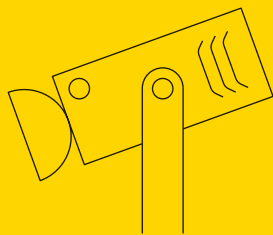
Fashion tech and digital

The increasing influence of technology is reflected in the emergence of a new generation of fashion start-ups using 3D printing, big data and wearable technology. Artificial Intelligence (AI), Virtual Reality and Augmented Reality (VR/AR) is also increasingly important and is set to become more so. The Thames Estuary Production Corridor is at the forefront of these innovations, being home to growing tech and digital ecosystem. It has also received major investment in R&D and is developing schemes for skills and infrastructure development.



Textile and materials innovation

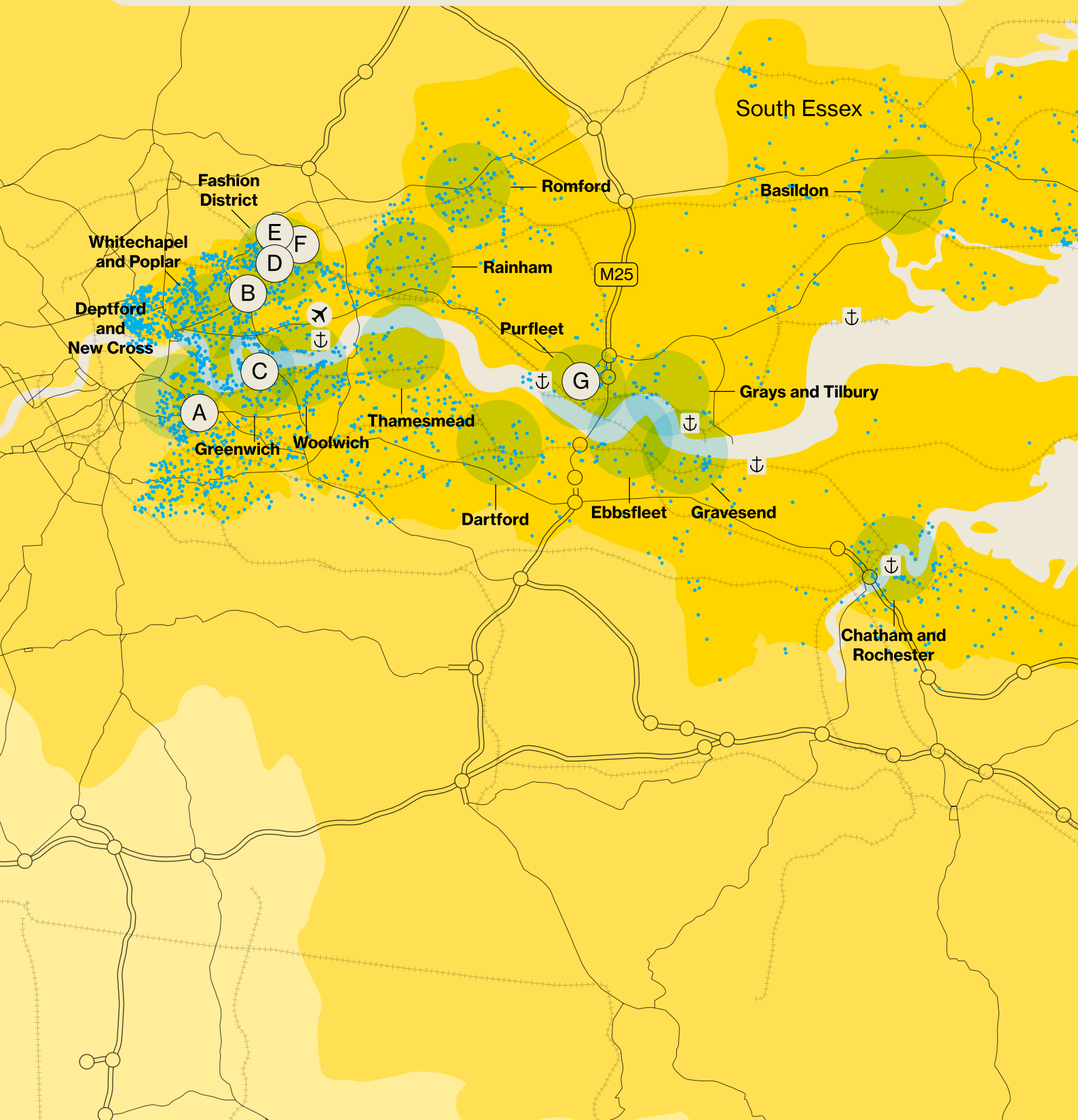
The UK leads Europe in textile innovation and is ranked third in the world. The country is now advancing developments in new, environmentally sustainable materials and production technologies. Led by the University of the Arts London, the production corridor-based R&D project Business of Fashion, Textiles and Technology (BFTT) is a pioneer of this field. The focus is on delivering sustainable innovation within the entire fashion and textile supply chain, emphasising sustainable material and textile design, and circularity.

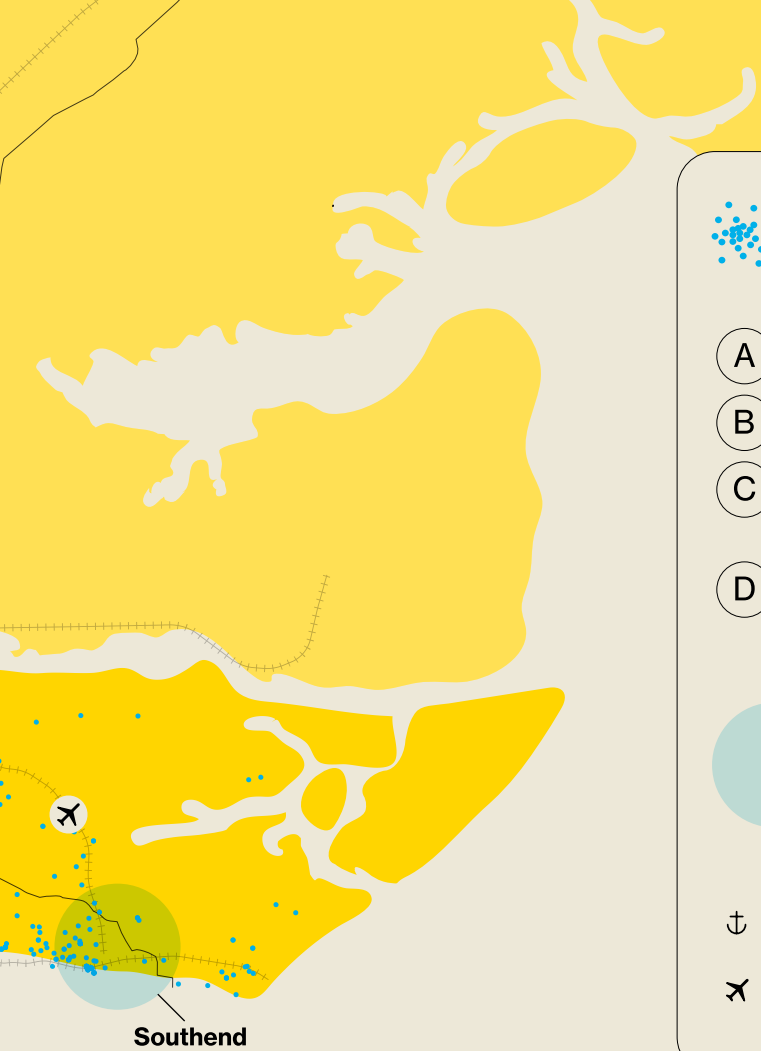


Supporting creative services

The fashion production industry is supported by a wide range of creatives from photographers to publishers, set designers, music, media, digital, PRs and advertising specialists. Their contribution to the sector is vital. The Thames Estuary Production Corridor has a strong and mobile pool of freelancers working across creative services. This is a clear asset for sector development in the region.

Powered by the Fashion District, there is a strong cluster of fashion production businesses in east London, along with micro-clusters across the rest of the estuary. Knitting together existing and emerging fashion production communities will create more capacity across the Thames Estuary.





Fashion production businesses in Thames Production Corridor. Key facilities include:

- | | |
|-------------------------------|--|
| (A) Cockpit | (E) Fish Island Village |
| (B) Poplar Works | (F) The Lab E20 |
| (C) Greenwich Design District | (G) Bob and Tamar Manoukian Costume Centre |
| (D) London College of Fashion | |



Further clustering opportunities for fashion production infrastructure, anchor businesses and/or education providers

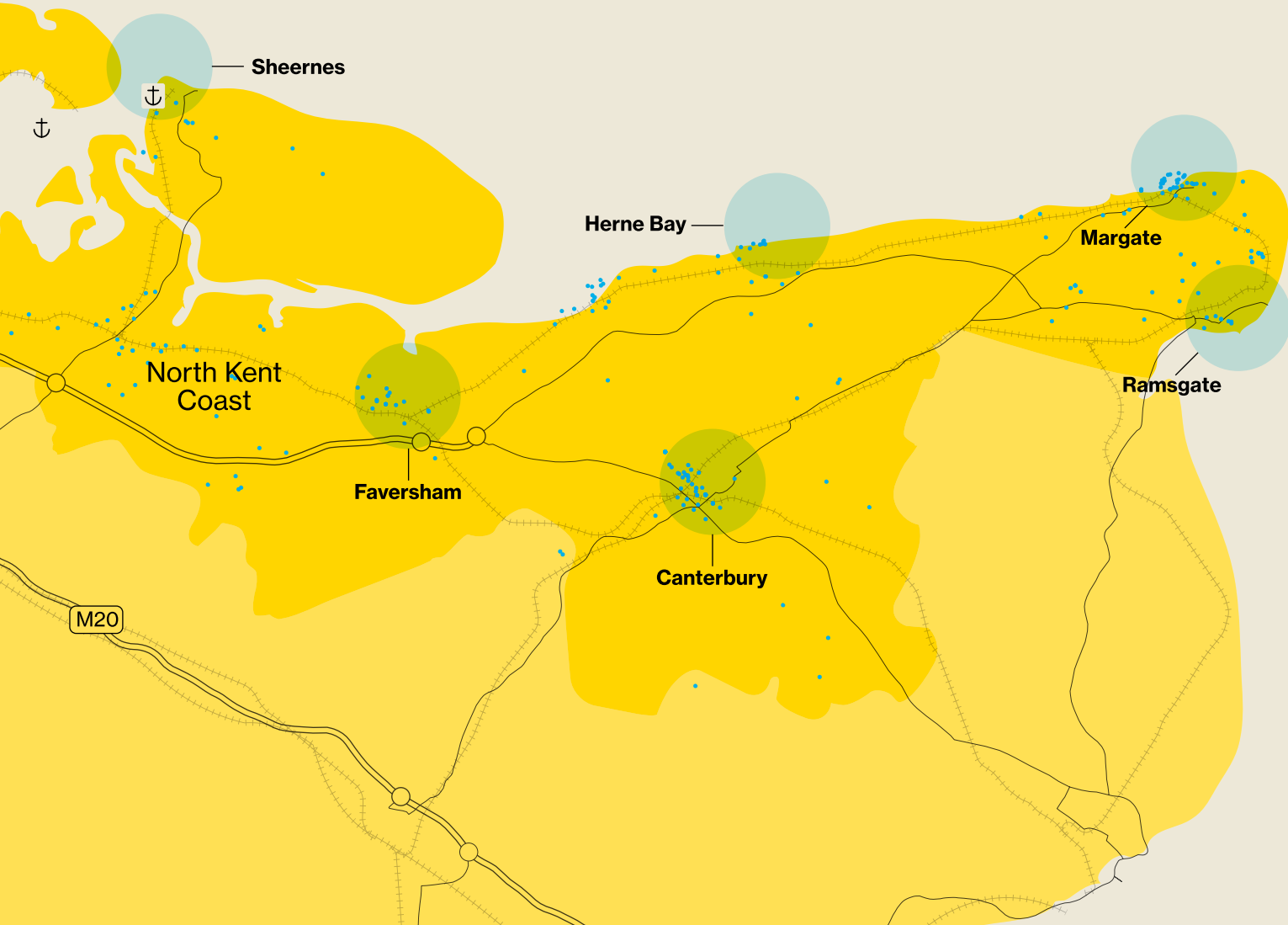
⚓ Dock

↘ A Roads

↘ Motorway

✈ Airport

⋈ Rail



“Fashion in the UK is changing. The industry is beginning to look at whole new ways to make and sell clothes with shorter supply chains, big reductions in textile waste and a much smaller environmental footprint. It’s so encouraging to see Thames Estuary Production Corridor responding to sustainable, circular and ethical fashion practices with a continued supply of affordable fashion workspace in the estuary for the long term.”

Adam Mansell
CEO, UKFT



Fashion District Festival, Spitalfields

Making it:

ApparelTASKER

A factory championing responsible manufacturing, sustainable development, and slow fashion.

Set up in 2012 and based in an eco-factory in Bow, Tower Hamlets, ApparelTASKER is a fashion services company. It provides garment development, sampling and bespoke manufacturing for small start-ups and medium-sized brands, alongside larger labels looking for transparent and flexible UK production. ApparelTASKER is located near the Fashion District and Poplar Works.

The company has grown gradually as demand has increased. Today, it employs around 45 machinists with a capacity in the region of 750-1,000 garments a week. The factory has been gradually expanding its floorspace and the company has also launched a new 3D sampling studio. It champions a holistic view of responsible manufacturing. This includes above industry standard wages and working with local suppliers. It also uses solar energy to power and heat the factory and minimises waste from the start of the garment manufacture process.



The case for fashion production

Fashion production in the Thames Estuary Production Corridor has proved resilient in its growth during turbulent times. One example is the re-emergence of added-value production for high-end fashion production.

The sector is growing more than twice as fast across the Thames Estuary Production Corridor than the rest of the UK, seeing 16% business growth and 12% employment growth between 2016-2021.

Increased investment, collaboration and partnerships should lead to tighter and more localised supply chains. The estuary is ideally placed to grow and develop a competitive offer and stronger fashion supply chain.

£900m

estimated direct and indirect economic contribution of the fashion industries in the Thames Estuary Production Corridor

1,920

fashion production businesses across the estuary in 2021

4,315

people employed across the fashion design and manufacturing sector with a further 1,620 estimated in the freelance workforce

16%

increase in fashion production businesses in the estuary since 2016

13,000+

businesses working in fashion retail, distribution, marketing and supporting services

43,000+

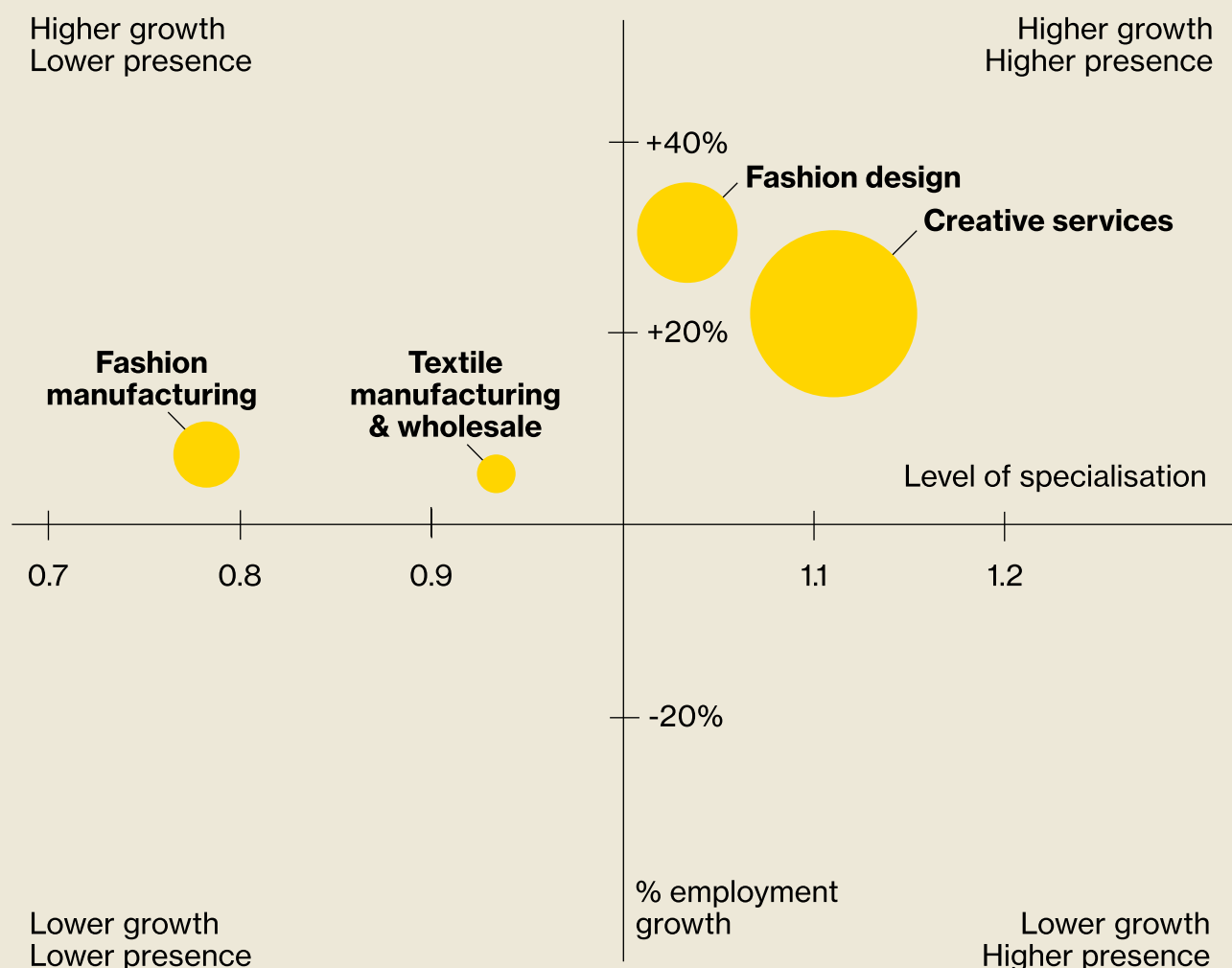
jobs across the fashion value chain from retail to distribution and marketing

The sector has grown faster in recent years thanks to London's Fashion District, building on organic growth happening up to 2018. This has created a new environment for fashion innovation and a new destination for investment in fashion business in the UK. Despite COVID-19, fashion production businesses in the Thames Estuary Production Corridor have increased more than twice as fast as the sector in the rest of the country.

Research shows that there has been employment growth across different parts of the fashion sector, and that the Thames Estuary is particularly specialised in fashion design and creative services that provide important supply chain activities for the sector (photographers, creative directors, stylists, marketing etc).

Fashion design is a growing specialism across the region. While fashion design is still clustered in London, data suggests employment growth in Margate, Medway and Southend-On-Sea.

Creative services which are an important asset to growth are active across east London, Southend-On-Sea, Canterbury, Medway and Basildon. Fashion manufacturing employment specialisation appears lower than the UK average. Design and manufacturing are intrinsically linked and often locate closely. This creates an opportunity to develop supply chains and nurture small businesses for a sustainable value chain.



Sector size, specialization and growth by employment in the Thames Estuary Production Corridor (2015-2021) Source: BRES, ONS 2021



Fashion District Festival, Spitalfields

FASHION DISTRICT FESTIVAL

Fashion District Festival

ual: london college of fashion

A celebration of fashion sustainability and innovation

Hosted by Spitalfields

11-16 JULY



SEE FULL PROGRAMME

Fashion District Festival, Spitalfields

Accelerating action

Almost £400m has been invested in the estuary's cultural production sector since 2017. Hundreds of potential production sites are mapped across the region. With an engaged education sector, a latent talent pipeline and major new projects in progress, the Thames Estuary Production Corridor is a key part of this amazing growth story.

We are working with local and regional partners with expert knowledge to ensure new cultural infrastructure projects meet local priorities and offer communities what they need to thrive. Government investment is in place to support a long-term strategy. By connecting businesses, education providers and clusters, we can stimulate new ideas, collaboration and technologies to support the fashion design and manufacturing sector to flourish.

An exciting pipeline of cultural production projects for the estuary is well underway, owned and managed by partners. As part of this pipeline, large scale 'accelerator project' is in development to deliver a fashion manufacturing micro cluster in east London. This project aims to promote local growth, circular economy practices and serve the diverse communities of Tower Hamlets.



Accelerator project:

Fashion manufacturing and upcycling micro-cluster

An under-used building has been identified for adaptive reuse. This includes 9,000sqm (96,000sqft) of space to re-activate and unlock social, economic and community benefits. The space will have the means and facilities to support local fashion and garment businesses at different stages, allowing them to grow, remain and thrive in Tower Hamlets.

What is needed for progress?

The following pages outline the main gaps and opportunities in the estuary's fashion sector.

Estuary leaders and local agencies are best positioned to know how to fill these gaps with local assets and local economies in mind. Towns and cities across the estuary have a chance to claim their part of the estuary's creative industries story by directing local strategies in response to these opportunities.

This section also sets out priorities for new infrastructure and types of future projects which will drive resilient and sustainable growth, support innovation and attract investment.

Strategic support from Thames Estuary Production Corridor partners at regional level will also offer access to wider networks, resources and markets. In combination, these local and regional efforts can build a long-term sustainable competitive advantage for the Thames Estuary in fashion design and manufacturing.

“I’m so pleased to see Thames Estuary Production Corridor focusing on engaging local communities in the rapidly expanding fashion sector to secure the opportunities of growth for people on the doorstep. Training, job creation, affordable workspaces, supporting local enterprise and a focus on sustainability are crucial to ensuring that the sector benefits places and people for the long term.”

Blossom Young
Poplar HARCA



The Factory and Silver Building, east London

Gaps and opportunities

Gap: Scale up capacity & fragmented supply chain

Although a micro-size sector offers flexibility, it can also hamper information exchange, make supply chain integration harder and make securing investment difficult. Systemic barriers to growth include capital investment, access to markets, distribution and scaling up as well as intellectual property protection.

The consumer landscape for fashion has seen significant shifts in recent years. With the rise of digital technologies, consumers now engage with a mixture of physical and online retail environments. As much as any physical product, fashion is now part of the 'experience economy'. Consumers – particularly younger ones – expect online and high street retail environments to reflect one another, and to see new product each time they visit either the website or a physical store. The increased frequency of visits is reflected in a much faster cycle of new product development and launches. Overall, the traditional two-season cycle has ceased to be the business model for growth in the sector. This means that the supply chain needs to respond more quickly and accurately to signals of consumer demand.

The need for shorter lead times and a quicker supply chain response is a challenge for a sector which typically has a long and complex supply chain, further disrupted by recent events such as Brexit and COVID-19. While there is clear evidence that physical clustering of businesses and talent in east London has many benefits, there is limited evidence of supply chain relationships in the rest of the Thames Estuary.

Within the fashion industry, there is already agreement that the sector must change as the entire value chain shifts towards sustainable and responsible practices in a resource-constrained world. There are many examples of model local interventions and circular practices. The rationale for reshoring (bringing manufacturing and services back to the UK) is growing as the same time as the demand for sustainable fashion. Emerging technologies show potential for scaling closed loop and regenerative recycling of textile and clothing. However, planning and investment must start now. Without it, individual interventions will struggle to make a wider impact.

Opportunity: A connected, circular and ethical fashion sector for the estuary

The Thames Estuary has a network of creative places, cheaper commercial and industrial land, good connectivity and latent capacity. Spaces across the region have been identified which, with the right injection of investment and infrastructure, could increase production capabilities and to develop a more responsive and connected supply chain. The presence of the Fashion District in the region is an additional distinct competitive advantage.

At the start-up stage, business knowledge and skills, access to finance and affordable workspace are vital, partners should focus on how to enable these factors.

Circular economy models and production space focussed on reuse and recycling are forging new links with places, businesses and communities, establishing innovative approaches to circularity. With a dynamic and connected sector, there is a better change of achieving sustainability goals.

Opportunity: Connect to regeneration efforts

Alongside major investment in large-scale creative production facilities, the estuary is also witnessing wider significant regeneration and change. Fashion designers and makers can be core to this regeneration. They can animate empty spaces in town centres and operate interactive hubs engaged in high street life, public places and community life.

Recent public funding for cultural infrastructure has laid a strong foundation for growth. Projects in Stratford, the Royal Docks, Woolwich, Thamesmead, Ebbsfleet, Purfleet, and Margate have all delivered new cultural production capacity. Regeneration activities in Southend, Chatham and Basildon will create further opportunities, as will East Bank, which is delivering the biggest cultural investment in a generation at the Queen Elizabeth Olympic Park.

The Mayor of London's Good Growth Fund and the Cultural Development Fund delivered by Arts Council England on behalf of the Department of Digital, Culture, Media & Sport provide clear examples of targeted funding with interlinked culture and regeneration goals.

Across the Thames Estuary there has already been high uptake of other recent government funding streams aimed at high streets and town centres. Local councils across the corridor have bid for around £200m from the Future High Street Fund, Town Deal and Levelling Up Fund. Some of this funding has already been confirmed. This offers a clear opportunity to join the dots between town centre and place-based regeneration projects and fashion production industries.

Case Study: Creative Estuary

Creative Estuary is forging a new future founded on creative energy and innovation, along the length of the Thames Estuary. It is transforming some 60 miles across Essex and Kent into one of the most exciting creative clusters in the world, initially supported by investment from Department of Digital, Culture, Media & Sport's Cultural Development Fund and now Arts Council England. Creative Estuary is led by the University of Kent on behalf of a group of public sector and cultural organisations.

Since 2019 Creative Estuary has been delivering a number of projects and programmes:

- Creative Estuary Co-commissions, supporting new commissions for estuary-based producers, organisations and artists.
- Estuary Festival, a multi-arts festival shining a spotlight on the Thames Estuary region.
- The Estuary Producers Network, connecting artists and producers working across the creative industries in Essex and Kent.
- Ideas Labs, bringing together academics, technologists, businesses and cultural professionals, to share knowledge and explore culture-led solutions to contemporary issues across the estuary.
- Place Brand and promotion, creating a new narrative for the region and promoting opportunities nationally and internationally.
- Re:Generation 2031, which empowers young people aged 16 to 25 years in disadvantaged parts of north Kent and south Essex.
- Creative Assets Development, working to bring underused spaces back into creative use across the region through feasibility studies, research and brokerage.
- Cultural co-location, finding holistic ways to integrate cultural infrastructure into community buildings and outdoor spaces.

POPLAR
WORKS



Gap: Access to production space

Existing workspaces are increasingly vulnerable to rising rents and redevelopment of premises. High workspace and rent costs are often perceived as a barrier for fashion design and manufacturing businesses. This underscores the need both to protect existing workspaces and assets, and invest in existing clusters and micro-clusters to build capacity.

Fashion design and manufacturing activities, as well as some supply chain creative

services have specific workspace requirements which not all commercial premises are able to accommodate. In the Thames Estuary, vacancy rates are low and there is growing demand for office and industrial space from a range of sectors, making production spaces harder to secure.

Without adequate and appropriate production space, the stability, and reliability of fashion industry supply chain will suffer and consolidation and scaling up activities will be limited.

Opportunity: A dynamic property market and fresh approaches to land and planning

The Thames Estuary's commercial property market is outperforming the UK average, showing that the estuary is an attractive business location. In this context, policymakers and developers have a vital role to play in directing this dynamism to serve wider place-based goals.

Innovative work by the South East Creative Economy Network, the Creative Land Trust in Margate and London's Creative Land Trust demonstrate models of securing the right kind of space for cultural production

activities and ensuring the continued supply of affordable workspace in the future.

Culture and creativity are increasingly being embedded as part of planning and development. Creative Estuary's Cultural Planning Toolkit, Creative Enterprise Zones and affordable workspace policies in the London Plan and an increasing number of Local Plans all illustrate how planning can be used to direct development activity to help deliver and protect cultural infrastructure.

Case Study: Margate Creative Land Trust

Margate Creative Land Trust was co-created by the community and local creative practitioners, and the organisation has been established as an independent charity by Thanet District Council on behalf of the Margate Town Deal Board.

Margate is home to a burgeoning creative community. Whilst creative businesses have grown by 158% since 2009, Margate has lost 11% of its commercial spaces in the last 20 years. When coupled with rising rents for the remaining eligible spaces and a lack of appropriate venues for the variety of artistic pursuits, there is a vital and urgent need to provide space to creative practitioners in order to protect and grow the creative industries in Margate.

Taking inspiration from the model developed in London for a Creative Land Trust to protect creative space in central London when property values are rising, the role of the Trust in Margate is ensuring that creative space and programming is inclusive and supports underserved communities to access opportunities within the creative industries of leadership, jobs, training and enterprise development.



Resort Studios, Margate



Poplar Works, Bow

Gap: Digital transformation and skills shortages

The Thames Estuary is facing staff shortages in key creative, production and technical disciplines. In particular, there is a lack of specialised manufacturing skills as well as fused skills needed for innovation. Historic low wages in the manufacturing sector and the loss of freedom of movement from Brexit are contributors to this. Addressing these issues is challenging in this mostly micro-size sector which currently has limited shared workforce development resources.

At the same time, the fashion and wider textile industry is undergoing a rapid digital transformation. This includes increasing use of big data, technology, and more automation of production and logistics processes.

Technology offers a chance to experiment with new materials and structures that could not be used before. This technology can also become a critical factor in the sustainable development of fashion manufacturing.

A sustainable, fully functioning and successful fashion ecosystem in the Thames Estuary Production Corridor will not happen without investment in innovation. This needs to encompass innovation in sustainable and circular business models, reimagining online and mobile shopping, smart textile and innovative fabric, designing new sustainable materials, supply chain transparency, waste management, and others.

Opportunity: Build skills pipeline and invest in production innovations

The Thames Estuary Production Corridor is home to world-class fashion and creative higher education institutions, including Loughborough University, London College of Fashion, UCA and University of Kent. This is supported by a network of further education and technical colleges providing more 'hands on' courses. Examples include sewing and pattern cutting at North Kent College in Dartford, South Essex College at High House Production Park and tailoring at Newham College. These institutions have good leads into the industry, allowing them to respond quickly to sector needs and skills gaps.

Active partnerships across the Thames Estuary Production Corridor with a focus on fashion skills and enterprises are working together to support sector growth, attract investment and foster research and innovation in the industry. There are opportunities to scale these and grow others.

For instance, UAL's new Fashion, Textiles and Technology Institute (FTTI) is evolving out of the Business of Fashion, Textiles and Technology (BFTT) Creative R&D Partnership and include East Bank partners, Loughborough University, UCL and QMUL. FTTI is a network of specialist research, knowledge exchange and business support delivering sustainable innovation across the entire fashion and textiles value chain. It operates where design, STEM, cultural anthropology and business intersect.



Chatham Intra, Medway

“Creative Estuary’s delivery has made visible the Thames Estuary Production Corridor vision and impact. We are committed to our partnership to support the evolution of this vision. Together we can achieve a great deal to ensure the sustained growth of the creative industries in the estuary. It’s an exciting opportunity to build a new narrative for the region as the centre of Britain’s thriving creative economy.”

Lorraine Cox

Director, Creative Estuary

Infrastructure priorities

The following pages set out specific provisions needed to respond to the gaps in infrastructure for the fashion design and manufacturing industries in the Thames Estuary.

Ranging in both scale and scope and with net zero at the heart, these projects have the potential to create value locally, from sustainable job creation and career pathways to circular economy and textile waste management, revitalising high streets, placemaking alongside many community benefits.

Local leaders can use these priorities and associated requirements to make decisions on how to best work with their own assets (land, workforce, institutions) to take up the opportunities of the fashion design and manufacturing sector.

Provide specialist affordable workspace for graduates, start-ups and small businesses.

Develop an upcycling hub with a focus on eco-fashion and circular practices.

Develop an on-demand micro-factory production centre to build capacity and encourage local supply chain development.

Create spaces and initiatives blending fashion production, showcasing, local skills development and career pathways.

Setting up spaces for research and development, fashion tech and the future of retail, in partnership with the Fashion District.

Making it:

Elvis & Kresse

A certified B-Corp rescuing and repurposing waste material from unexpected sources.

Based in an ancient mill in the outskirts of Faversham, Kent, Elvis & Kresse creates luxury crafted luggage, accessories and homeware from reclaimed materials. The brand launched in 2005 after the founders heard that London's decommissioned fire-hoses, having served their purpose to society, were going to landfill. It quickly gained a reputation for sustainability. By rescuing and repurposing waste material from unexpected sources, the brand provides luxury fashion with a lower environmental impact. As well as being innovative, this approach is also very cost effective.

All products are created from nil-value waste streams otherwise destined for landfill, totalling over 300 tonnes of waste to date. In 2020 they bought a farm which aims to be carbon positive. This includes their new workshop - the largest straw bale building in Europe - which is solar powered and air source heated. They also have their own natural waste water and sewage treatment, have planted a vineyard and are developing a solar forge.



Poplar Works

This partnership between Poplar HARCA, UAL/LCF and the Trampery is supported by the Mayor of London and forms part of the Fashion District. It provides shared workshop spaces as well as 40 affordable fashion studios for designers, makers, jewellers, experienced business owners and start-ups.

Fish Island Village is a 6-acre campus of affordable studios, facilities, and social spaces, for London's fashion innovators which launched in 2022. Its 10 buildings provide 42 studios for emerging fashion talents, 21 creative studios and 28 co-working desk spaces for fashion-tech start-ups. There is also a 1,000 sq ft of sustainable manufacturing facility plus a range of other facilities and business support.

The Lab E20 (Stratford), launched in 2021 with a focus on positive fashion and sustainable living, provides 3,500sq ft creative hub situated at the centre of the new Innovation District in Stratford. It offers experiential retail, cultural exhibition and creative workspace curated by the Fashion District.

London College of Fashion, UAL (East Bank). The university has moved to a new campus in Stratford. East Bank is also home to other leading institutions such as Sadler's Wells, V&A, BBC and Loughborough University.

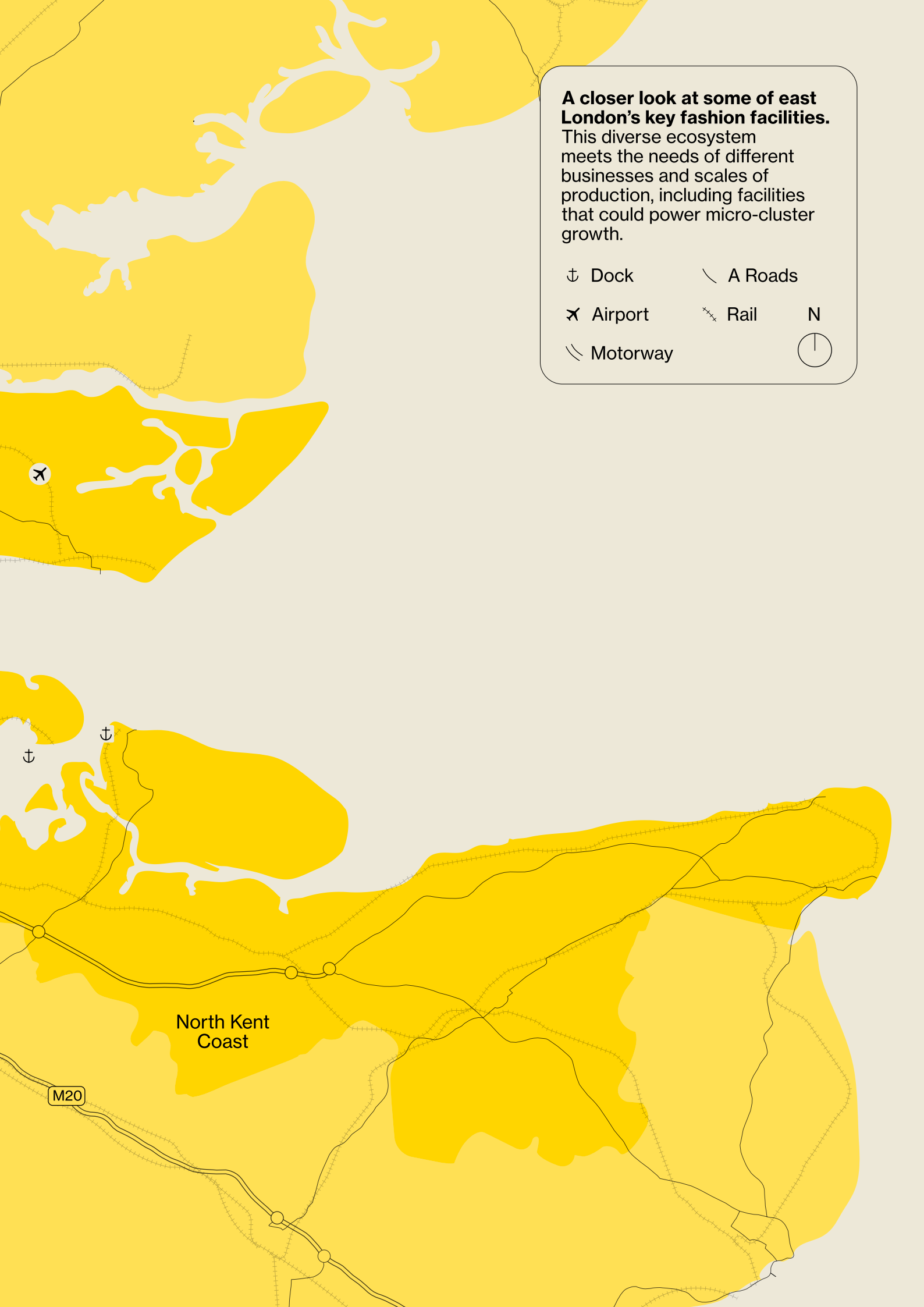
South
Essex

East
London

Cockpit is a centre for excellence in craft. Providing affordable studio space and in-house business support to talented makers, Cockpit supports craft makers at the start of their careers, as well as those who are more established, to grow and build successful, thriving businesses in the UK and internationally.

Greenwich Design District (Greenwich Peninsula) was completed in 2020. It consists of a cluster of 16 buildings for the creative industries and is home to fashion brands like Abaga Velli.

Bob and Tamar Manoukian Costume Centre, built in partnership with the Royal Opera House at High House Production Park, hosts the South Essex College's Costume Construction degree. This unique programme gives students the opportunity to work alongside professionals from one of the most prestigious theatres in the world. There is also a purpose designed store for over 20,000 costumes for productions currently in repertory as well storage for the ROH's precious historic collection of opera and ballet costumes, props, artwork and historic musical instruments.



A closer look at some of east London's key fashion facilities.
This diverse ecosystem meets the needs of different businesses and scales of production, including facilities that could power micro-cluster growth.

⚓ Dock

↘ A Roads

✈ Airport

⋈ Rail

N

≡ Motorway



North Kent Coast

M20

Making it:

Petit Pli

Using innovation to prolong the life of clothing and reduce waste throughout the production value chain.

Based at Fish Island, east London, Petit Pli is a material technology company tackling the wasteful and unethical fast fashion industry. The company was funded by an aeronautical engineer who wanted to design innovative and sustainable garments for the most extreme athletes: children. Since launching in 2017, it has grown rapidly going from concept to award-winning start-up in under two years. After partnering with London College of Fashion's Fast-Tech Pioneer Programme, it has won a dozen awards.

Combining design and engineering, Petit Pli adopted human-centred design principles, drawing on research into origami and deployable structures for small CubeSat satellites. After much R&D and product testing, Petit Pli's rainproof, windproof outerwear suits are now on sale. Its designs also help retailers by reducing inefficiencies around inventory size requirements and stock management.



Fashion District Festival, Spitalfields



The Factory and Silver Building, east London

Specialist affordable workspace for graduates, start-ups and small businesses

What	Flexible studio, production and small-scale equipped spaces
Rationale and opportunity	Outside east London, which has benefited from significant investment to increase its provision of affordable fashion workspaces, there are a limited number of suitable, flexible and shared workspace facilities targeted to the industry in the wider estuary. Given the make-up of the sector, the industry is price-sensitive. In London, and also in some parts of the estuary, existing workspaces are increasingly vulnerable to rising rents and redevelopment of premises. We must therefore ensure the provision of affordable workspace is considered as key to support business retention and development. In addition, physical spaces often provide opportunities for collaboration and networking, as well as access to industry links and business support.
Key characteristics	<ul style="list-style-type: none"> • Usually provided within larger buildings to allow multiple managed units • From 80sq.ft (individual studio) to 5,000sq.ft • Some facilities provide shared facilities (e.g. storage or specialist production rooms, including for pattern cutting, sample making, sewing and fitting) • Usually operated by an independent and specialist workspace provider • Typically includes spaces available to hire by the day or the week • Location is important, as it will often relate to the brand of the fashion label and the willingness of clients to visit
Requirements	<ul style="list-style-type: none"> • Minimum clear height of 3.5m • Larger space for storage of materials • Subdivision of space into clean and 'messy' space for specific functions is key to larger creative studios
Precedents	<ul style="list-style-type: none"> • The Trampery Fish Island Village, London • Sustainable Studio, Cardiff • Fashion Tech Farm, Eindhoven

An upcycling hub with a focus on eco-fashion and circular practices

What	Upcycling facility for materials reuse, repurposing and recycling co-located with a production cluster
Rationale and opportunity	As the Thames Estuary Production Corridor develops good growth for the sector, we must ensure all interventions support the fashion economy towards a fully renewable model. There is already interest in developing new models that encourage synergies across innovation and tech, craft, waste and resources, environment, education and skills. However, without access to funding and investment for strategic systems change, individual interventions will struggle to create wider impact. Similarly, emerging technologies show potential for scaling closed-loop and regenerative recycling of textile and clothing, but planning and investment need to start now.
Key characteristics	<ul style="list-style-type: none"> • Promote circular economy objectives and technologies that deliver sustainability, waste reduction, recycling and upcycling in fashion • Large scale, minimum 50,000sq.ft which co-locates fashion manufacturing spaces, micro-factory and upcycling facilities • Likely located within designated industrial land or compatible neighbouring uses
Requirements	<ul style="list-style-type: none"> • Textile manufacturing space • Garment recycling hub • Space for business support (including branding, social media, e-commerce, governance and organisational development) • Street level large entry access and loading facilities • Facility to take any production services (water, gas, electricity) to any point within production area and at high power
Precedents	<ul style="list-style-type: none"> • Fashion Green Hub, Hauts-de-France • Garment to Garment, Hong Kong • Green Field Hub Paimio, Finland

An on-demand micro-factory production centre to build capacity and encourage local supply chain development

What	A new production space that enables local supply chain development and re-shoring of fashion production
Rationale and opportunity	The fashion design and manufacturing sector in the Thames Estuary Production Corridor is made of small independent early-stage SMEs, micro-businesses and freelancers. Despite the greater flexibility this brings, it can hamper information exchange, make supply chain integration more difficult and is a major challenge to securing innovation capacity and investment. The pandemic has heightened the need and demand for sustainable fashion. The trend towards digitisation, shorter lead times and mass customisation means that production close to customers will be a key component in the future of fashion manufacturing – with benefits including speed-to-market, flexibility and a lower carbon footprint.
Key characteristics	<ul style="list-style-type: none"> • Spaces from 1, 500sq.ft to 5,000sq.ft • Storage needs are substantial, potentially taking up to 50% of the required space unless there is communal storage space available • Additional tools, such as buttonholing machinery, steam presses, 3D and digital fabric printing are often rented or shared as communal equipment • May hold a dual purpose; workshops for creative production and an office from which commercial business is run • Location is important, as it will often relate to the brand of the fashion label and the willingness of clients to visit • May be part of wider makerspace facilities
Requirements	<ul style="list-style-type: none"> • Minimum ceiling height of 4-4.5m / double height spaces allow for production areas where lifting/ handling may be required • Best provided at street level • Some need for large entry access and loading facilities • Facility to take any production services (water, gas, electricity) to any point within production area and at high power • Need for sound insulation/ attenuation
Precedents	<ul style="list-style-type: none"> • Building Bloqs' Textile Studio, Enfield • Fashion Enter & Zund Micro-factory, London • The Fabric Source, Copenhagen

Spaces and initiatives blending fashion production, showcasing, local skills development and career pathways

What	Catalysing projects in and around high street regeneration
Rationale and opportunity	The fashion production industry is supported by a wide range of creatives from photographers to publishers, set designers, music, media, digital, PRs and advertising specialists. Their contribution to the sector is vital. The Thames Estuary Production Corridor also has a strong and mobile pool of freelancers working across creative services. This is a clear asset for sector development in the region. New or adapted infrastructure can build this economic base to sustain good quality jobs creation and wider cultural, social and environmental benefits and value. This can also bring benefits to communities and vitality of high streets.
Key characteristics	<ul style="list-style-type: none"> • Making the sector visible by connecting manufacturers, designer, suppliers and consumers • Linking high street recovery by promoting eco-fashion, providing incubator/pop-up spaces for young designer talent, and encouraging innovative use of spaces in high street (e.g. fashion pop-ups, community up-cycling space/ library of things) • Create physical or virtual knowledge exchange or networking platform to connect a wide range of fashion designers, makers and wider supply chain and encourage collaborations
Requirements	<ul style="list-style-type: none"> • Adaptive re-use of high street spaces • Flexible spaces on flexible terms • Central location with good public transport links and near anchor businesses or freelancer pool • Public-facing activities
Precedents	<ul style="list-style-type: none"> • Sun Pier House, Medway • Shoreditch Fashion District Festival, London • The Factory and Silver Building, Royal Docks

Spaces for research and development, fashion tech and the future of retail, in partnership with the Fashion District

What	Incubator, accelerator and specialist co-working spaces for R&D, fashion tech and embracing the future of retail
Rationale and opportunity	The development of fashion production infrastructure should be planned with R&D and innovation in mind. These infrastructures should participate in addressing the ‘grand challenges’ that the fashion industry is facing. This includes solutions to develop the sector as well as test new ideas and models. As technology becomes an increasingly more transformative force across all parts of the economy, there is a considerable opportunity to digitise sectors through co-growth and collaboration. Within this context, the fashion industry has only begun to unleash the potential of digitalisation based on computer sciences, communication and electronics. The fashion sector and digital sector growth agendas can be converged, including re-imagining online and mobile shopping, supply chain transparency, and textile waste management among others.
Key characteristics	<ul style="list-style-type: none"> • Spaces supported by access to specialist skills, technology, governance and organisational development advice • Access to and adoption of digital technology and development of a range of software skills across the supply chain • Urban context with good access to public transport and amenities and in proximity to higher education institutions / existing creative business base • Operated by – or strong links to - Higher and Further Education institutions or industry leaders
Requirements	<ul style="list-style-type: none"> • Incubator and accelerator ‘crossover’ spaces between fashion and technology/ STEM • Hireable as individual deskspaces or workspaces • Leasing agreement generally more flexible or short-term than conventional office space or managed workspace • High-functioning digital connectivity
Precedents	<ul style="list-style-type: none"> • The Lab E20, Stratford • Leeds Innovation District & Future Fashion Factory Programme, Leeds • Textile and Fashion Hub, Melbourne

What comes next?

Accelerator projects and pipeline development

Thames Estuary Production Corridor partners will continue to work together to develop the current set of accelerator projects in Tower Hamlets, Basildon and Margate and provide tailored support to ensure their long-term success. By securing public and private investment in these projects, we can deliver large scale impact.

Looking beyond these projects, we will explore further opportunities within the project pipeline with the ambition to work in more places and with more partners. Together we work to deliver new cultural production projects, strategically positioned to build capacity and accommodate creative industries growth in the Thames Estuary for years to come.

Governance

To support this important work, a new advisory board for the Thames Estuary Production Corridor is now in place to provide leadership and advocacy. The Board includes high-level representation for the estuary's cultural production sector, from grassroots organisations to major cultural institutions.

The board comprises senior sector specialists with a key role in overseeing implementation of the next stages of the Thames Estuary Production Corridor strategy. The board will work closely with lead partners Creative Estuary and Thames Estuary Growth Board and explore ways to create better networks, develop collaborations and strategically support production businesses in accessing resources, finance and new markets.

Investment

The screen and fashion design and manufacturing sectors are recognised priorities for investment in the Thames Estuary. The Thames Estuary Growth Board works with investors to match opportunities to funding in the region. The Growth Board is an investment partner, investing in early-stage projects as a catalyst for significant new private sector investment and will work with other Thames Estuary Production Corridor partners to secure investment into creative production in the region.



ApparelTASKER, Tower Hamlets

Get in touch

If you want to learn more about the Thames Estuary Production Corridor, connect with delivery partners or explore investment opportunities please contact:

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**CREATIVE
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