THE
PARK
ROYAL

ATLAS

An Employment Study
of
London's Largest Industrial Area

***The Park Royal Atlas* v1.1**

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Contact
Tobias Goevert, Principal Project Officer
North West Team
Email: tobias.goevert@london.gov.uk
Enquiries: 020 7983 4100
Website: www.london.gov.uk

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The Park Royal Atlas is an employment study prepared by the Mayor's Regeneration Team, clienting by the Old Oak Common Joint Authority Project Team in association with the Park Royal Business Group. The Project Team includes the Mayor's Planning Unit, Transport for London, Brent, Ealing and Hammersmith & Fulham

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Team Members
Greater London Authority
Finn Williams
Tobias Goevert
Francis Moss
Mirjam Wurtz
Ella Wiles
Alex Marsh
Joan Caba
Katherine Spence

Guest Researchers
Erin Byrne
Samuel Cuthbert
Tom Mabey
Alison Mayer
Elizabeth North
Adam Towle
Steve Barton
Genevieve D'Souza
Sean Kelly
Ian Weake
Kaya Chatterji
Charlotte Domanski
Beth Kay

Other Contributors
Architecture 00
Marko and Placemakers Ltd

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All the businesses that gave their time to participate in the creation of the Atlas

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h&f putting residents first

Brent

Ealing www.ealing.gov.uk

Transport for London

MAYOR OF LONDON

FOREWORD

I want London to be the world capital of business, and for all Londoners to share in that success. This means creating more long-term, sustainable employment, improving opportunities for entrepreneurs to set up and grow their businesses, and supporting exciting new places of work.

Park Royal is one of Europe's largest and most thriving industrial estates. Since the 1903 Royal Agricultural Show – which gave the area its name – Park Royal has supported a range of world renowned businesses such as Guinness, Heinz, and McVities who continue their world leading operation from the site today.

This Atlas reveals the continued importance of Park Royal as a motor for our economy. With over 2000 workplaces mapped and analysed, it helps make the case for attracting investment to stimulate growth and improve the working environment for the 30,000 plus people based here.

The Park Royal Atlas is as much about revealing the people and businesses behind the statistics as it is about understanding this fascinating place. My team has come across inspiring examples of entrepreneurs running businesses ranging from advanced metal fabrication to theatrical prop makers, from highly specialised food production to logistics and smart recycling.

The Atlas celebrates the diversity of enterprise. It uses data collected from months of surveying and hundreds of interviews to give an insight into what people make, the facilities they operate from, and the improvements to the area they would like to see.

I am delighted that the interviews revealed an air of confidence about the future, as well as the demand for this place expressed through low vacancy rates. However, it is clear that more work is required to improve working conditions and address persistent problems such as a lack of parking spaces.

This work is a stepping stone towards better engagement and tailored support to local businesses from the Mayor of London and Boroughs, forming part of the emerging partnership with businesses. This study will inform policies and strategies for sustainable regeneration in the Park Royal area for years to come, as well as signalling an exciting new approach to industrial localities across London and beyond.

I would like to thank all who have given time to support the making of this unique Atlas and ask for any comments on this first edition to be passed to my team.

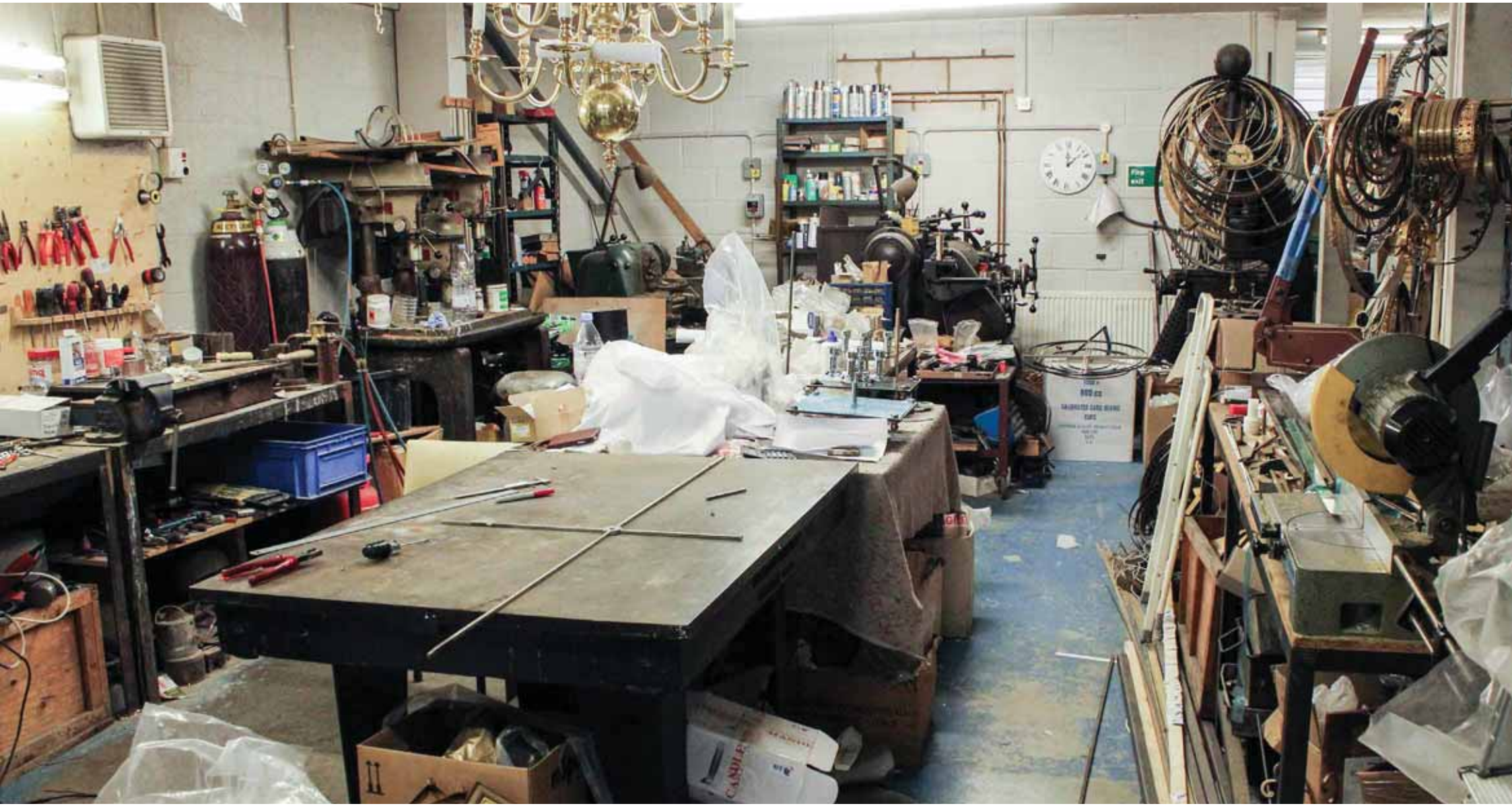


Kit Malthouse
Deputy Mayor of London for Business and Enterprise

23rd May 2014



INTRODUCTION



INTRODUCTION

OBJECTIVES

Considered to be London's largest industrial area, Park Royal covers an area equivalent in size to the City of London. Although it is known that there are a large number of businesses in Park Royal, until recently relatively little was known about the what they do or what types of spaces they use. The *Park Royal Atlas* reveals the diversity of business activities in Park Royal. Its specific objectives are to:

- Provide detailed information on the local economy
- Record all employment activities
- Analyse business activities by number, size and clustering, as well as supplier and customer locations
- Improve the visibility of the local economy by celebrating and marketing its diverse products and services, as well as highlighting its contribution to the sustainability of the wider London economy
- Support inward investment in the locality
- Inform policy and strategies for intensification and economic growth in the Park Royal and Old Oak Common Opportunity Areas
- Support sustainable economic development and regeneration

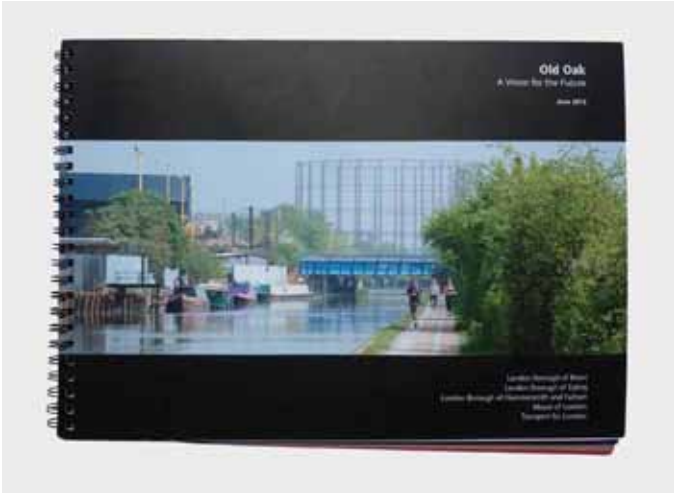
Reveal the diversity of business in Park Royal

STUDY AREA

Park Royal is an industrial area located to the west of central London. It is situated within three London boroughs, Brent, Ealing and Hammersmith and Fulham. The area is bounded by National Rail, Overground and Tube lines to the north, south and east, while the North Circular (A406) and Western Avenue (A40) form additional boundaries to the west and south. The study area is based on the Park Royal Strategic Industrial Land boundary, designated in the London Plan (2011), with the addition of adjacent industrial sites in Alperton and North Acton.

OLD OAK COMMON

The eastern corner of Park Royal, known as Old Oak Common, is set to be transformed when a 'super hub' High Speed 2 (HS2) and Crossrail Station is built by 2026. Old Oak Common will become a new district with up to 24,000 new homes and more than 55,000 jobs. The Park Royal Atlas will inform this development, as well as helping to strengthen and enhance the important industrial offer of the rest of Park Royal.



"Old Oak A Vision for the Future" (GLA, June 2013)

ATLAS OVERVIEW

The *Park Royal Atlas* presents the results of a door to door survey of all the workplace units in Park Royal. The methodology explains how the survey was undertaken and the methods used to collect and categorise the data. The analysis maps the collected data, using graphs to highlight key trends, as well as presenting case studies of selected businesses.

fig. 1 Park Royal LOCATION MAP

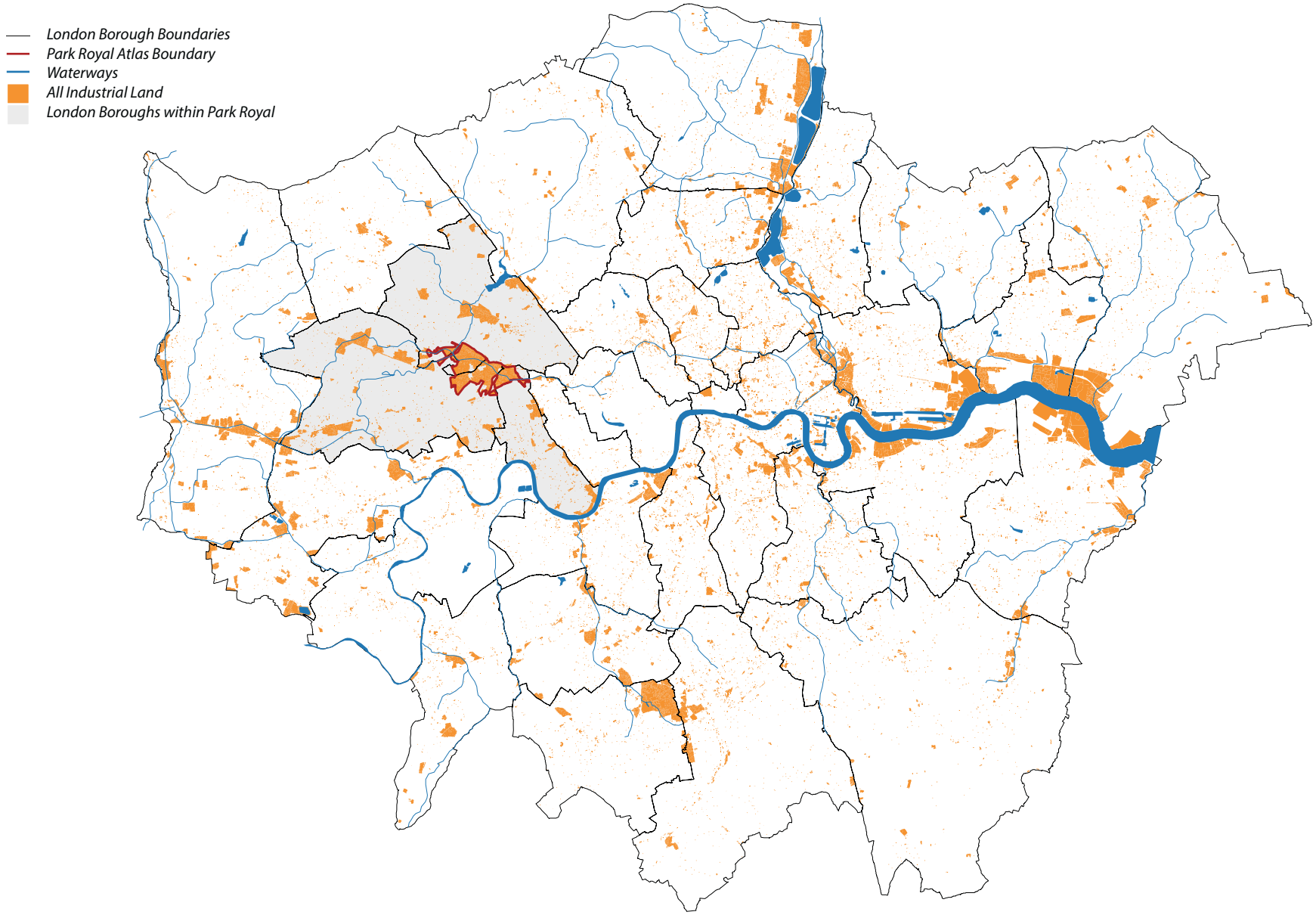
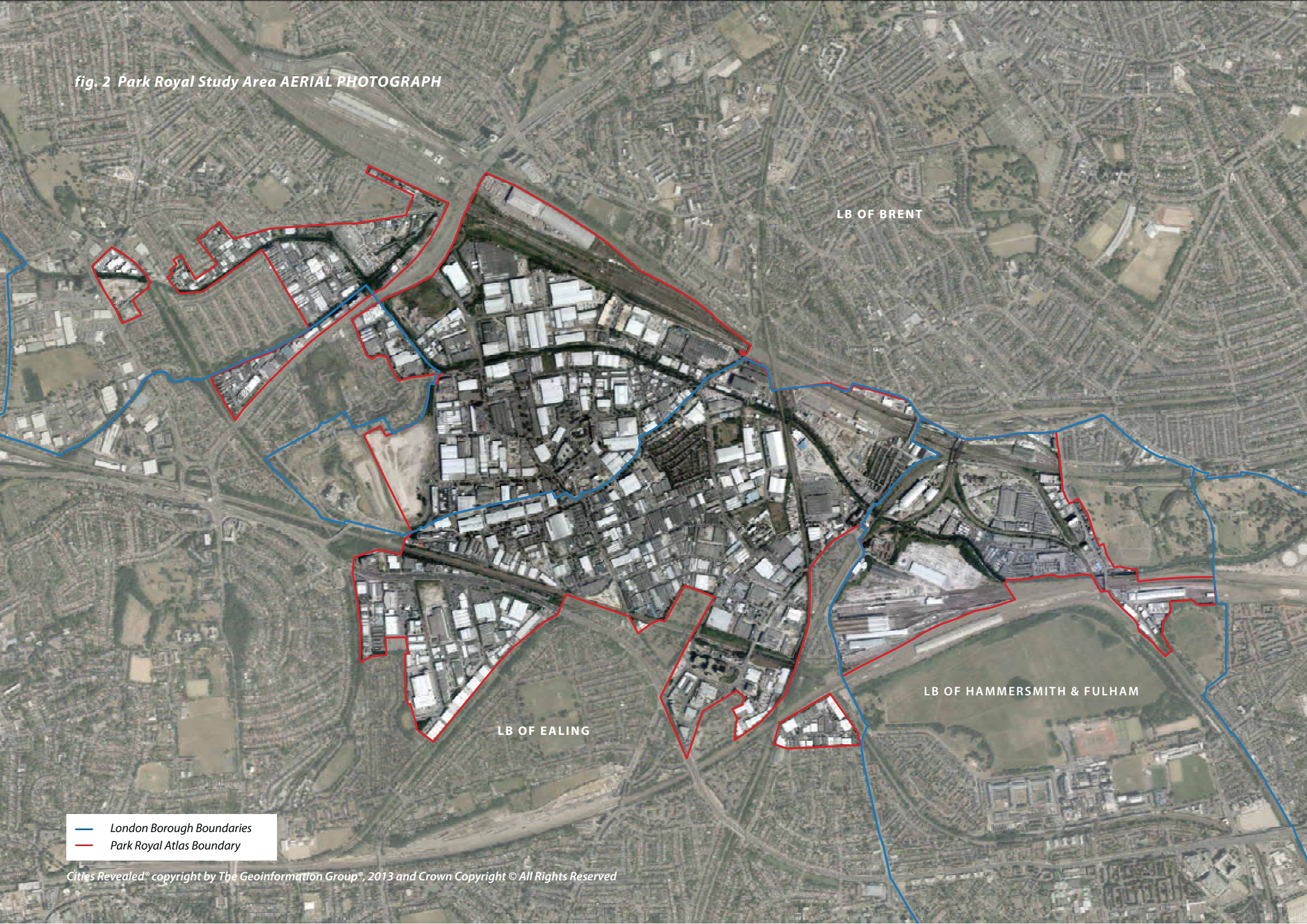


fig. 2 Park Royal Study Area AERIAL PHOTOGRAPH



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MEET THE BUSINESSES

Names of the 1,717 active workplaces revealed by the survey of Park Royal.

(Iq) Easy Broadcast Ltd / Crown
1-1 Transport
1Dream Educare
24-7 Drama
2D-3D
313 Motors Limited
360 Rotation
3A Distributions Ltd
3D Tyres
4 Rail Services Ltd
A B C Building & Maintenance Constructors Ltd
A B M Motors Ltd
A Class Motors
A Kapadia
A. Fulton Company Ltd
A.I.D. Training + Operations Ltd
A+M Hire / A+M Studios
A1 Business Solutions
Aaa Linen Services
Aargee Novelties
Ab Butchers
Ab Solicitors
Abacus Fundraising & Party Products
Abacus Print
Abbey Appliances
Abbey Distributors
Abbey Manor
Abbey Marketing
Abbey Point Cafe Bed & Breakfast
Abbott Signs Ltd
Abc Services For People Like U
Ableman Shaw & Company
Abu Afif Sweets
Acava Studios
Accountancy Services London Ltd
Accurate Profession Ltd
Ace
Ace Café
Ace Cars
Ace Records Ltd
Ace Shutters / Mr Tint
Ace Vehicle Deliveries
Ace Waste / Simpson
Acme Technology Ltd
Active Ventures UK Ltc
Acton Coachworks
Acton Commercial Factors Ltd
Acuk
Ad Londres
Addictive Restaurant & Bar
Addwings Ltd
Adidas (UK) Ltd
Admoveo Ltd
Adriana Auto Crash
Advanced Broadcast Services Ltd
Advanced Training Academy
Advansys Technologies Ltd
AFG Auto Mot Centre
AFP Partnership
Africa Today
African Relief Fund
Aftershock
Agility Trains
Ahaleena
Air Fast Tickets
Airport Executive
Airports First
Airstar European Network
AJ Cleaning Services
Ajay Business Centres Ltd
AK Motors
Al Enam
Al Gali Ltd
Al Mazar Deli
Al Sqr Express
Al Waste
Al-Ahram International
Al-Azawy
Alba Stone
Aldi Jd Ltd
Aldous Lamont
Al-Etejah Tv Ltd
Alexander James Contracts Ltd
Alexanders Removal
Alfa Romeo Coachworks
Alforat Satellite Channel
Alhashimi
Al-Jabal Food
All Stars Agency Ltd
Allen Autos
Allied Motors UK
Allpex Limited
Almalthea Designs
Al-Murad
Alperton Motors Limited
Alpha Bakeries
Alpha Beta Business Centres
Alpha Consulting
Alpha Mania
Alpha Omega Marketing Ltd
Alpha Transfer Ltd
Alpha Vehicle Movements Ltd
Alter London Ltd Co.
Altima Lighting
AM Construction
AM Motors
Amaco Group
Amari Plastics Ltd
Amathus
Amazing Tiles
Amazon
Amazon Shine
Ambersphere Solutions
Ambican UK Ltd
Ambros Direct Ltd
American Muffin Co. Ltd
Ammoura Ltd
Amouri Motors
Active Marketing Solution
Amz Motors
Andrew West Interiors
Angel Fernandez Sanchez De La Morena
Anglo Pacific
Anna Sholz Ltd
Ansari Garage
Antiqua Print Gallery Ltd
Anything Express
Anytime London Ltd
Anytwist Ltd
Apc Overnight
Apolo Multiform Ltd
Apply Food And Drinks
Appy Food And Drinks Ltd
Arab News Network Ann
Archie's Mediterranean Products
Arco
Area 18
Aredour Ltd
Arena Flowers
Aro Marble Ltd
Arrogance Accessories
Art Dental Laboratory
Art House Hire Ltd
Art Logistics Ltd
Artist Spaces Ltd
Artist Studios
Arts Bibliographic
Ary Network
Asda Supermarket
Ash Kumar Products
Ashcon Building Contractor Ltd
Ashia Centur Ltd
Asme Engineering Ltd
Assalam Alayun
Astel UK Ltd
Astrid + Miyu Ltd
Ataman
Atex Business Solutions
Atn Network UK Ltd
Atrium Modular Lighting UK
ATS Euromaster
Attila Boros Bakery
AUH Thomas Food
Auto Audio
Auto Capital
Auto Delta London Ltd
Auto Doctor
Auto Motors
Auto Service
Auto Services Vehicle Solutions
Auto Trans Middlesex
Auto Villa
Autobike Mot Centre
Autogem Motor Concepts
Automotive Glass Distribution
Autotrade UK
Autotrust
AV Link Ltd
AVC Live Ltd
Avolites
AW Bodyshop
Awafi Foods Ltd
Axis Partnership
AXT
Aya Autos Ltd
Az Accountancy Services UK Ltd
Azco Interiors
B Mackin Construction
B&Q / Trade Point
B.E.C.Perimetre Security Ltd
B+K Skips
B+M Motors
Babak Art Studio
Babcock
Bakkavor
Bakkavor Foods
Bakkavor Meals
Balance Sheets And More
Ball Bearing Centre Ltd
Ballward Limited
Bamboo Basket Distribution Ltd
Barclays Bank Plc
Barker Ross Recruitment
Barry Bensons Ltd
Bascomb + Drew
Basrah Lounge / Tobacco
Batten-Edwards Instruments
Bayfield
Bbc Studios
Bd Décor (Barry Bank)
Beachcourse Limited
Beat 2 Beatz
Beat About The Bush
Beauty Base Ltd
Beck's Cafe
Bees Enterprises
Beijing Tong Ren Tang (UK) Ltd
Beirut Nights Café And Resteraunt
Bell Trading Ltd
Bellisseomo Ltd
Belmont Printing Company
Belvedere Carpets Ltd
Ben Pearce
Benchmarx
Bespoke Events London
Best Hand Car Wash
Best Price Garage Ltd
Best Tint/Best Glass
Best Way
Bestway Catering Wholesale
Biffa Waste Services
Big Yellow Self Store
Bighams
Binding Supplies & Services
Bischell Ltd
Black Island Studios
Blott
Blue Apple Cars
Blue Cruise Ltd
Blue Light Services Ltd
Blue Light Services Ltd
BMV Distributors Ltd
Boden Fashion
Bodybits Ltd
Bodystretch UK Ltd
Bodytec Accident Repair Centre
Bogdan Kurski Ltd
Bonhams
Book Events
Boothill Motorcycles
Bosche Services
Botanic Lab
Bower Products Limited
Bp/M&S Simply Food
Bradley Plumbase
Braiform
Brand Distribution (UK) Ltd
Bravo Aluminium Systems
Brazilian Salon
Bread And Honey
Breezemount
Brian Clarke Studio
Brightbox Marketing
Britannia Autos Ltd
Britfil Steel Fabrication
British Council
Broadcast Sessions Ltd
Brooks Packaging Ltd
Brownell Ltd
Browns Sea Foods
Brunnel Freight Forwarding
Btm International (UK) Ltd
Bud
Builders Depot
Building Products Ltd
Bullet Express
Burger King (UK) Ltd
Business Associates UK Ltd
Business Mobiles
Butterfly Cleaning Ltd
C.E. Moore Ltd
Cable Logic (Europe) Ltd
Cadogan Tate
Cafe Ola
Cafe Racer Custom Motorcycles
Café Royal
Caffe Concerto
Caffe Giordani Ltd
Cakubi Consulting Ltd
Caldigit
Caledonian Supply Company & Mehadrin Wholesale Ltd
Canal Cabin
Canapes Direct
Candy Desserts
Cannon Hygiene Ltd
Canonbury Cabinet Makers
Cany Cafe Lounge Limited
Cape Systems
Capital Accountants
Capital Seafoods Ltd
Car Giant
Car Hire Helpline Ltd
Car Spare Factors
Carcare Pro Limited
Caribbean Roti Company
Carlo Manzi
Carphone Warehouse
Carphone Warehouse
Headoffice
Carrara Marble
Cartridge Value
Casa Bardotti
Cava Bien Fashion
Cbg Group UK
Ccf Ltd
Cds Group
Celestial Church Of Christ Park Royal Parish
Celex Ltd
Celia's Kitchen
Cell Technologies
Centercomms Ltd
Central Middlesex Hospital
Centre House Business Centre
Centre House Caffe
Ceva
Champers (Wholesale)
Chandlers
Chandra Enterprises
Chanton
Charlex Auto Ltd
Charlie Bigham's
Charmant UK Ltd
Chas Berger
Chevalier Technologies Ltd
Chiquito Mexican Restaurant
Chocolate Lab
Choice Textile Ltd
Choices Jewellery Ltd
Church Of God Evangelism
Cimple Solutions
Cinderella Hair Academy
Cirro Lite (Europe) Ltd
City Clothing Ltd
City Link
City Link Express Delivery
City Used Cars
Cityfruits.Com
Ckm
Clarition Designs Ltd
Claudia Carr
Clay Oven Co Ltd
Clay Ovens Company
Cleaning Suppliers
Clear Windows & Conservatories Ltd
Cleshar
Cleshar Contract Services Ltd
Clinical Trials Lab
Cloudmove Ltd
Club21
Clutter Prop Hire
Cms Distribution
Codeexceptional Ltd
Collins Motors
Colour Sound Experiment Ltd
Colt Telecommunications
Concept Engineering Consultants
Connected Healthcare Ltd
Construction Enterprise Ltd
Consul Chartered Surveyors
Content By Conran
Conway Aecom
Cool Britannia
Cooling UK
Corbel Of London Ltd
Corkteck Ltd
Cornices Centre
Coronation Cables Limited
Coronation Road Snack Bar
Cosmic Villas
Cosmos Intertrade Ltd
Costa Coffee
Covent Garden Candles
Coyaba
CP & S Ltd
CP Electronics Ltd
Craftsman Bespoke Joinery
Cranberry Wholesale
Creative Design Consultants Ltd
Creative Instore Solutions
Crest Connections Ltd
Crest Of London
Cross Media Ltd
Crossrail
Crown Cleaning Services Ltd
Crown Decarative Centre
Crown House Business Centre Management
Crystal Laundary Services
CSS Construction Site Supplies
Ctv Outside Broadcast
Cullen Way Repairs Ltd
Cumberland Park Sotre
Curious Science
CWF Children Worldwide Fashion (UK)
Cworkshop
Cyborg Group Limited
Cynergy It Solutions Ltd
Cypher 16 Studios
Cypress Books
Cypressa Limited
D & F Wine Shippers Ltd
D Curtis
D. Cutter (International) Ltd
DAB Engineering Co Ltd
Daf Royal Parks
Dafcon Ltd
Daniel Martin & Associates
Danny Sullivan Group
Darhma
Data Force UK Ltd
Datawind UK Plc
David Malik & Son Ltd
Daylight
Db Advanced Carpentry & Joinery Ltd
Db Carpentry Joinery
Db Media Limited
Dbest Ltd
De Baere Ltd
Deadline
Dean Training
Deli Med Ltd
Delphi Diesel Systems
Deltra Electronics
Deluxe Accountants & Tax Consultants
Deluxe Media
Deluxe Printers Ltd
Dennys Plastics
Dephna Group
Dephna Impex Ltd
Design Colour
Dg (UK) Textiles Ltd
Dhl Express Delivery
Diageo
Diamond Transmissions Ltd
Diamond Vehicles Ltd
Dickens School Of English
Digital Devices Ltd
Dina Foods Ltd
Direct Supplies Ltd
Discount Carpets And Furniture
D-Link Europe
Do Education
Document Capture
Dominion Christ Church
Domino's Pizza
Dooa Wholesalers Ltd
Door Entry Direct
Double 4 Ltd
Double 4 Self Storage Ltd
Dowa International Ltd
Dpd UK, Interlink Express
Dr Kate Dinnen
Dragon King
Dropcap Ltd
Dry Cleaners And Washers
Dukes Island Studio
Dyn Metal
E Fast Couriers & Deliveries
E Meyer & Co (Mentor) Ltd
EPA Languages Services Ltd
Ealing Autos Limited
East End Cosmetics Ltd
Euroscent
East West Merchandise
Easy Car Hire Ltd
Easy Housing Association
Easybus
Easyreach Ltd
Eccentric Trading Company Ltd
Edmundson Electrical
Edwards Removals
Edwins Bathrooms
EE
Ej Bushell & Sons Ltd
El Omara
ElecMec Ltd
Electec Solutions
Electrocoin Automatics Ltd
Electrocoin Sales Ltd
Electronic Theatre Controls Ltd
Elegance Tyres
Elegant Dry Cleaners
Elegant Marketing Consultants Ltd
Elite Car Care Ltd
Elite Moving Systems Ltd
Eman Land & Securities
Emporio Brazil
Emr
Ems
Ena Films
Energy Star
Enotria Winecellars Ltd
Enterprise
Environmental Business Products Ltd
Environmental Business Products Ltd
Epos Connect Ltd
Ereira And Matthews Ltd
Eros International Ltd
Ers Medical Ltd
Esquires Coffee House
Esska Design Ltd
Ethos
Eton International
Euro Accessories
Euro Bijoux Ltd
Euro Breads UK Ltd
Euro Cap Ltd
Euro Car Trade Ltd
Euro Diamond Drilling Ltd
Euro Signs And Graphics Ltd
Euro Splash
Euro Technical Services London Ltd
Eurofins
Euroglass UK
European Glass
European Glass Group
European Outreach Trust
Eurosoft Tech Ltd
Eurostart
Event Oracle
Eventoracle
Ever Fortune Ltd Colonial World Foods Ltd
Everyware
Evonik Met Ltd
Excel Staff
Exermax Technology Ltd
Exeter Street Bakery

Exodus Homecare Agency Ltd
Expedite
Export Trading Company Ltd
Express Av Ltd
Express Chef
Extravision Ltd
Fabric Suppliers Ltd
Fakhoury Patisserie
Falcon Surfacing Ltd
Families Relief
Fancom Technologies / Tmg Consultancy
Fantastic Services Park Royal
Farley
Farley Fine Furniture
Farran Café
Farrell Engineering Ltd
Fashion Link Ltd
Fast Track Motors
FCI Zoneblue Design Ltd
Fedex
Feel Good Carribean Resteraunt
Feelin Hungry Ltd
FG Tyres
Fiandaca
Fidenzi Design
Fifi
Film Fx Zone
Film Medical Services
Filmscape Studios
Financial And Accountancy Solutions Ltd
Finerose Limited
Fire Station
Firoz Group
First Choice Tool And Plant Hire
First Great Western
Fit Out UK, Base Build
Fix Auto Collission/Arc Ltd
Flame Installations Ltd
Flames Food
Flash Film Studio
Flash Film Transport
Fletcher's Bakery T/A Grain D'or
Flexitrade UK Ltd
Flight Searches Ltd
Floors Galleria
Floorsanderhire (Eu) Ltd
Flyer Distributions Ltd
Focus Furnishing
Fomac Construction Ltd
Food Equip Ltd
Food For Thought (London)
Food Lords Limited
Food Partners
Formerly Avis
Forward
Foxglove Events Ltd
Foxtons
Frank Saul (Fashions) Ltd
Fraser Water Services
Free Believers In Christ
Fellowship International
Free Bellebers In Christ
Fellowship Trust
Freeform Design And Construction
Friendly Removals
Friends Of Africancaribbean Carers & Sufferers Of Dementia
Fruition Homes Ltd
Fruition Properties
Fujiseiki Europe Ltd
Furnish
Fx Rentals
G. Jackson
G4S Group
Gag Truncks Ltd
Galacia Laundry
Galindo
Games & Gears Llp
Ganesh Motors
Gapuma (UK) Ltd
Garu Sana Ltd
Gb Motors
Gbcl Global Gulf And British Co Ltd
Gcs Diagnostics
Gd Auto Design
Genesis Recruitment Agency
Genuine Motors
Geo W. Neale Ltd
George Fraser Limited
Get Set Hire
Giant's Diner
Gill Cash And Carry
Gillhams Sollicitors Llp
Gina Love London
Glassbusters Ltd
Global Cars Ltd
Global Health Professionals Ltd
Global Tamil Vision
Globeshield International Ltd
Gmg Carpentry
Go Network UK Ltd
Go Networks UK Ltd
Going Nuts
Golden Meadows
Golden Oriental Foods Limited
Golden Vans
Goldenstand Southern Ltd
Goldenwheel Auto Centre Ltd
Goodies Foods Ltd
Gormley Masonry Ltd
Gowing & Pursey
Gowing And Pursey
GPX
Grade House Ltd
Graham The Plumbers' Merchant
Grainmill Limited
Grand Junction Arms
Granger Hertzog Ltd
Granite World
Grant Mills Wood Indesign
StayfixGreathire Ltd
Green Office Supplies Ltd
Greencore Group
Greenfields
Gsbi Motors
Gt Vehicles
Gurus
Gw Wiring Product Ltd
H&S Legal Llp
HR Owen
H+M Media
Haik Removals
Hair Extensions And Wigs Ltd
Hairraisers
Halfords Autocentre
Hanama Storage Ltd
Hand Car Wash And Valeting Centre
Hand In Hand For Syria
Hannex Construction
Hapworth Kitchens Ltd
Harlesden Islamic Cultural Centre (Hicc) / Masjid At Taqwa
Harman Enterprise Ltd
Harris Calman
Hassan + Co
Hatton Metalcraft
Hawk Rubbish Clearance
Hawthorn And Rex Howard
Headlines Hair And Beauty Supplies Ltd
Heathrow Truck Centre Ltd
Hedley Humpers - Hammer Holdings
Hedley's Humpers
Heidi Klein (Press Office)
Help For Life
Help The Needy
Helphire
Hemi Property Services Ltd
Hendon Motors Ltd
Henry & Sons
Hermolis
Hessar Trading Co. Ltd
Hhb Communications Ltd
Hickman Transport
Hip Props
Hippo Graphics
Hire It
Hireman
Hj Motos
Hl Marble
Hm Printers
Hm Tyres
Hmr Ltd
Hobbs London
Holhouse
Holiday Inn Express
Honeyrose Bakery Ltd
Hoo Hing
Hosipa
Hotcam Ltd
Hotchi Cash And Carry
Hotchkiss Air Supply
Howdens
Howdens Joinery
Hoxton Beach
Hozizon World Cargo
Hs Motors
Hsbc
Hss
Lloyds Motor Spares
Husse
Hyde Park Bathrooms
Hydraulic Fleet Solutions
Hyperion Lighting Ltd
Hythe Motorcare Ltd
I Dallies
Ibb Polish Building Wholesale
Ice Accessories Ltd
Idailies
Ieinei
Igreja Mundial Do Poder De Deus – Londres
Il Fornaio Ltd
Imagefarm Ltd
Imex
Imi
In Style Direct Ltd
Inbrit Logistics Ltd / Security Escorts Transport Ltd
Inclarity Communications Ltd
Incoms System
Independent Leaders
India Jane
Indigo Accountants Ltd
Industrial Hygiene Ltd
Influence
Infomass Services Ltd
Initial
Inkpaper Design And Print Ltd
Inspired Elements Ltd
Integra Medical Reporting
Interactive Imagination Ltd
Interfusion
Interior Automation Ltd
International Plenitude Ministries
International Relocation Ltd
Interpal
Ior Group
Iron Mountain UK Ltd
Ishaan Universal Ltd
Ishan Garage
Islam Box Ltd
Islamic Education + Research Academy
Ist Power Products Ltd (Stewart Transformers Division)
It Ambulance Ltd
Italian Furniture, Carpets And Flooring
J & M Car Solutions
J A Glover Ltd
J Kelly Autos
J Pao & Co Ltd
J&B Construction Co. Ltd
J&J Trading
J. Coffey
J.P.F.T.V.S.
Jabroke Engineering Co (UK) Ltd
Jack Wills
Jack's Cabin Café
James Burleigh Ltd
Japan Centre
Jat Glass
Jat Glass
Jayex Technology
J-Cars Sales Ltd
Jd Building Supply Centre
Jenny Svantesson
Jessica's Recipe Bag
Jetpoint Services
Jg Productions
Jh Car Sales Ltd
Jmd Automotive Limited
Jmr Autos
John F. Hunt
John Lewis Plc
John Pye
Joinery Ltd
Joubere
Jr Carter Ltd
Jubilee Estate Agents
Julie Light Glass
Jumeira
Junior Hagen Ltd
Just Airports
Just Care Group Ltd
Just Courriers Ltds
Jw Removals
K + S Dental Laboratory
K4nub
Kadiris
Kagey Lighting Ltd
Kalsan Tv
Kamil Bakery
KB Natural Foods Ltd
KBM Chartered Accountants
Kensington And Chelsea College Construction Centre
Kensington Car Wash
Kensington Dry Cleaners
Keyline
KFC
Kii Studios
Kindervine Day Nursery And Preschool
King Solomon Catering
King's Kitchens
Kitty's Café
KK Associates
KLS Interiors
KMS London Ltd
KN Auto Limited
Knife Is Life
Kojac Imports
Kolak Snack Foods Ltd
Kolak Snackfood Ltd
Ks Accessories
Kutch Engineering Works Ltd
L&M
L. Lynch
L'aquila
La Cabana Cafe
La Dulce Patisserie
La Maison Des Sorbets
La Muscle
La Piccola Deli
La Tua Pasta
Ladbrokes
Ladurée UK Ltd
Ladystar
Lafage Tarmac
Laguna Banqueting Suite
Lakes Food Euro Ltd
Lakethorne Group
Lambert Of London Ltd
Lane Harries & Jane Percy-Rob
Laser Tyre Station
Laundry
Lawrence Zammit
Lbc
Le Connaisseur
Le Pain Nouveau
Lead Products
Leading Route Ltd
Leather Land
Lebanese Bakeries 2000 Ltd
Lebanese Village
Lebanos Food Trading Ltd
Lees
Leo Mercurio Food
Leonidas Confiserie Duchateau Ltd
Leste Ltd
Levant Tv
Levantine (UK) Ltd
Lh2
Libanese Centre
Life Residential
Lifelike Flowers
Lignum Vitae Ltd
Link Communication
Link Fostering
Link Translation Services Ltd
Link Wholesalers Ltd
Linnetts Proofing Ltd
Lion Colours
Little Penny Ltd
Lizzanno Space Creation
Loan My Motor
Locatel UK Ltd
Lock Engineering Co Ltd
Locum Link Pharmacy Recruitment
Lodge Catering
Lofbergs
Loft Studios
Londis
London Business Consulting Ltd
London Carstore
London Chauffeur Drive Ltd
London Knockouts
London Mobility
London Special Executive Cars
London United Busways Ltd
London Vip Group
Long Island Products
Longshaws Design & Print Ltd
Lookers Jaguar
Lookers Plc
Lords Builders Merchant
Lotus Linens
Loubnan Natural Food Ltd
Loubnan Natural Foods Ltd
Louise Bradley
Lp Construction Ltd
Lua Lua Tv
Luckshmee Limited
Lunchtime Office Catering Co.
Lynchmob Studio
Lyons Learning
M E Moloney And Company
M&M Associates
M&M Metal Work Ltd
M. Moss (Repairs) Ltd
MAR Garage Ltd
M&N Traders
M6 Motors
Ma Automotive Services
Macahel
Machine Shop
Mackintosh's Catering Management Ltd
Madam Gautiers
Madame Gautiers
Madstron Healthcare
Magaza
Magnet Trade
Magnum Direct
Mahan Foods
Mai Trading Co. Ltd
Maisa
Maisanda & Co
Maison Blanc Ltd
Majestic Radio
Mak Automotive
Maker Builders Llp
Makro
Malcolm Cowen (Drinks) Ltd
Malik Metal Work
Mama Youth Project
Mammamia Itlaian Food Ltd
Manaco Mian Ltd
Management Office
Maneek Jewellery UK Ltd
Maple Fine Foods Ltd
Marasu's Petits Fours
Marathon Lab Supplies
Marble Arch Bathrooms
Marc B. Ltd
Mariapolis Ltd
Market Probe Europe Ltd
Markovich Mallah Furniture Ltd
Maroon Spice Catering
Martin + Co Willesden
Marvic Textiles
Matrix Chartered Accountants
Matthew Clarks
Maximum Car Care
Maxteleco Ltd
Mayhem UK
Mazage L. Ltd
Mc Shopfronts
Mcdonough & Associates
McVities
Mdm Auto Clinic
Med Fine Foods
Medecho Ltd
Medfoods
Medic Animal
Medical Services
Medicure Ltd
Medievance
Medis Health
Megatek 2000 Systems
Mela Project Metalworks
Memo Fashions Ltd
Merc
Mercedes Benz Park Royal
Merctech London Ltd
Metal Supermarkets
Metro Count
Metroline
Metropolitaion Fleet Services
Mexican Supplies Co
Mexl Express Ltd
Mfl Worldwide
Michael Brady Ltd
Micro Partners Limited
Middle East Al Ferdous Sweet Ltd
Middlesex Hose & Fitting Ltd
Miku Agencies Ltd
Millennium Food Services Ltd
Minas Transfer Ltd
Minds Ltd
Minerva Loose Leaf
Minerva Motors
Mini Diamond
Mission Accountants
Mister Shifter
Mjf Removal Company Ltd
Mk Complete Joinery Services
Mkw (UK) Ltd
Modern Props Ltd
Mokhtar
Monarch
Montague Laundaries
Mooca Cafes Ltd
Moon Cars Ltd
Moorogaabey Development Organisation
Morrells
Mostafa Persian Food Ltd
Mother + Child Welfare Organisation
Motorcycles Centre
Motorsense Limited
Mountain Of Fire & Miracles
Moyses Stevens Flowers Ltd
Mp Brothers Ltd
Ms Autos
Ms Drylining Plastering Services Ltd
Msm
Mt Chauffeurs
Mtv Autos
Muji
Multilines
Mumtaz Lebanese Restaurant
Muslim Care
Mvk Accomodation Ltd
Mw Scaffolding UK Ltd
Myriad Medical Supplies Ltd and GP Supplies Ltd
N Africa Auto Repair
N G Engineering Services
N S B Casements Ltd
N. Africa Auto Repair
Nacfi Foundation
Nad Garage
Nadi Park Royal
Naga Ltd
Nandos
National Electrical Wholesole
National Grid
National Lighting
National Rail
Nationwide Self Storage Limited
Natwest
Navid Ltd
Neg Earth Ltd
Nepall Tv (Europe) Ltd
Network Rail
New Accountancy + Financial Services Ltd
New Horizon Media (UK) Ltd
New North Wholesale Bakeries
New Quebec Catering
New Star International Co. Ltd
Newey And Eyre
Nick Gale Custom Cycles
Nik Motors
Nimble Security Services Limited
Nina Naustdal
Nochia Ltd
Nollywood Movies
Northway Tyres
Northwest Studios
Nosh Café
Nrs
Ns Welding & Metal Works
Nutri Centres Ltd
Nw Cars
O'connell Bros
O'donovan
Oberoi Masala
Oceanic Jewellers Ltd
Ocs Group Ltd
Odf
Office Moving International
Ohio Home Care Ltd
Om Fashion
Omega Bikes
Omkaar Kotedia Photogrpahy
Omnia Ltd
One8six
Ooh Weddings
Options Technology Ltd
Orange
Orbis Consumer Products Ltd
Orexis Fresh Foods Ltd
Organza Fashion Collections Ltd
Outback Rigging Ltd
Over The Rainbow Detailing
Overseas Medical Supplies
Overseas Medical Supplies Ltd

Owen + Williamson Ltd
P & A Motors
PR Fleet Services Ltd
Packaging Express
Packman Shelving
Pak Autos
Palestinian Return Centre
Panache Display Ltd
Panalux
Panic Music Ltd
Panmer Plastics Limited
Paragon Healthcare Services UK Ltd
Paragon Insurance Services
Paramount Options
Parcelforce
Pardo Ltd
Park Cafe And Restaurant
Park Lane Group
Park Royal Autos Ltd
Park Royal Centre for Mental Health
Park Royal Courier
Park Royal Hair & Beauty Salon
Park Royal Mot Centre
Park Royal Office Furniture
Park Royal Oriental Carpet Centre
Park Royal Post Office
Park Royal Service Station
Park Royal Studios
Park Royal Taxi Centre
Park Royal Van Hire
Pars Media Trust
Parsia International
Partspanel Ltd
Pascal Sacrepaye
Passenger Bikes Ltd
Patchi Mediterranean Sweets
Patisserie Rayan Ltd
Paul
Paul Vanstone Sculptures
Pauls Auto & Repairs Ltd
Pavehall Plc
PCB's 4 U
PDS Removal & Storage
Peal Windows
Peek And Rapkin Food Events
Pendragon
Pentecostal City Mission Inc
Pepper Tree
Peppercorn's Re-Taste
Perand Auto's Ltd
Perfect Crystal Windows
Persia Foods Ltd
Peters Auto Repair
Peters Motors
PGS
Phase3comunications
Philip Maes Fine Chocolates
Phoenix Automatics
Phoenix Of Vinyl
Photobox And Moonpig.com
Photocopiers Direct
Piligrim Payne & Co. Ltd
Pine Glade Ltd
Pipal Limited
Pirate
Pirtek Fluid Transfer Solutions
Pit Start
Pizza Hut
PJ Security Systems
Plan Bread Ltd
Planet Couriers
Plexus
Point To Point
Polymer (UK) Ltd
Pomodoro Clothing
Pop It Out Packaging Ltd
Por Jam Metalworks Ltd
Porcelain Tiles Ltd
Portables Direct Ltd
Portman Garage Park Royal Ltd
Portmore
Portobello Brewing Company
Portobello Press
Portugalia
Post Office Park Royal
Pots & Co.
Powerday
Ppi Claims Management
PR Management Consultants
Prabha Arts Ltd
Prasangi
Precedence Solutions Ltd
Preedy Glass
Prefit
Premier Car Care Centre Ltd
Premier Maintenance And Construction
Prime Light Electrical Ltd
Prime Television
Print Sign Design
Printhouse Corporation / Webhouse Corporation
Printpress
Privilege Chauffeuring Ltd
Prizma Windows
Pro Health Ltd
Pro Motors
Production Science
Products From Spain Ltd
Promote Technology
Pro-Motive
Propharmace
Protext Translation Ltd
Psav Presentation Services
PSB London Ltd
Psychological Healthcare Ltd
Pure Gym
Purfect Binding Company Limited
Purl Frost
Purple Grape Catering
QBS Software
Qualitube Ltd Danylo Boyev
Quality Mot Centre
Quattro (UK) Ltd
Quintus Property Llp
R's Fresh Market Ltd
Radical Bodyshop Supplies
Radiocoms
Raha TV
Rainbow Cnc
Raj Foods
Rajput Cleaning Services
Ramada Encore Hotel
Ramsey Rum UK Ltd
Ramtd
Ranjita
Rapid Auto Cars
Rarewaves.Com Ltd
Rashman Limited
Ravin Laurent Limited
Raw Fairies
Rayan' Autos
Rbc London
RDW Scenery
Realstar Ltd
Recycle My Old Phone
Red Box
Red Creative
Red Mist
Red Oak Services Ltd
Redbus Media Group
Redland
Reed In Partnership
Regal Distribution Ltd
Regent Gas Ltd
Regents House Art Studios
Relo Transeuro Ltd
Remi Car Autos
Renault London West
Renault Trucks
Repair Autos Limited
Resapol
Response Recruitment
Re-Structure Jc Ltd
Retail Realm
Retro Mania
Revolution Executive Cars Ltd
Reynards UK Ltd
Ribbon & Reed (London) Ltd
Richard Martin Lighting Ltd
Rigby & Peller
Right Price
Riku Group
Rise Restoration
Rmw Restorations
Roj Motors
Rolla Dome All Skate
Royal Gourmet
Royal Mail Group Ltd Princess
Royal Distribution Centre
Royal Park Timbers
Royal Somali Tv Ltd
RPM
RR sat Global Communications Network Ltd
Rsj Engineering Ltd
Rupert Magnus Trading Co Plc
Rustin Coffee / A E Stanton & Co
Ryans Garage
Ryden Plc
Saabco Ventures Ltd
Safe Autos
Sage Arts
Sainsburys Concept Centre
Salon Ltd
Salon Services Ltd
Sami & Co Accountants Ltd
Sandbone Interiors
Sandy's Café
Santa UK Ltd
Saregama Plc
Starlight Design
Satellite Broadcast Facilities Ltd
Savoir Beds
Savvy Constructions
Saywell Ltd
Scandi Kitchen
Screen Technology
Screwfix
Sean Car
Seasons Textiles
Seaward Travel
See Woo Food Specialists
Selectus Total Ltd
Sgf Engineering
Shah & Associates
Shayona
Shell UK Ltd
Sheng Da Ltd
Shephers Cafe
Sherrys Hair And Beauty Wholesaler
Shine Motors Ltd
Shiv Souvenirs
Shrine Credit Union
Shurgard Self-Storage
Sicilian Food Suppliers
Sigma Computers
Signature X
Sinclair Mckinsey Accountant
Sings N Print
Sipi Care
Sixty-Six Car Ltd
Sky Glass Limited
Sl-Gems + Minerals Ltd
Smart Care Training
Smith And Hunter Prime Carcare Ltd
Smokys Carpentry
SN Worldwide
Social Consultancy And Research Ltd
Sofar Ltd
Sola
Solutions Group Plc
Somali Broadcast Network
Somali Channel Ltd
Somali International Youth Development
Somali Voices Community Centre
Sonic (UK) Ltd
Sonik Products Limited
Sony Corporate Services Europe Ltd
Sorbitum Ices
Sound Mastering
Source Distribution
Southern Drapes
Souvenirs Of London
Space Nk
Spc Automotive Ltd
Speciality Drinks
Speedy
Spice Shack
Splashback & Worktops Ltd
Spot Colour Ltd
Spyker Design & Productions Limited
Squires Building Contractors
Sri Perdana Ltd
Sri Sita Vinayaga
Srs School
Sse Audio Group
Ssq Spanish Slate Quarries UK Ltd
Ssr Trading Ltd
Stanley Productions
Staples
Stapletech
Star Accountancy
Starlight Design
Starlite Trading Ltd
Station Cafe
Status Windows Ltd
Stayfix Ltd
Steel Deck
Stella Rossa Contractors Ltd
Sterling Studios
Steven Davis Furnishings
Steven Duggan Events
Stewart Parvin London
Stock In Trade
Stone & Building Ltd
Stone Inc.
Stone World Uniwax Ltd
Stoneyard Ltd
Storage
Storz Medical UK Ltd
Straight Talking Telco
Stratstone Aston Martin
Street Claim Solutions Ltd
Street Sushi
Strongbase
Stuff U Sell
Subway
Sukarah Lounge
Summit Furniture
Sun Ocean Ltd
Sunbeam Frames
Sunderji London Ltd
Sundream Enterprise
Super Hire Props Ltd
Supercover Insurance Plc
Superglazed
Supersteel
Supponor
Surface Doctor
Surface Measurement Systems
Survival Leisure Company
Swift Courtesy Cars
Swift Direct Claim Ltd
Synergy Networxx Lrd
T&C Cleaning Services
T&Senterprises (London) Ltd
Taiko Food
Take 2 Films
Tan M C Ltd
Tarmac Ltd Buxton Lime & Cement
Taste Of The Algarve
Tasty Central
Tax Assist Accountants
Tax Spot
Tazmere
Tea & Coffee Plant
Teacrate Plc
Techno Packaging
Telecitygroup
Tenpin
Tesco
Tesla Motors
Texaco Garage
TfL Uniform Services
TfL / London Highway Maintenance
Thames Reach Home
The Artisan Bakery Ltd
The Big Basement Company
Euro Toiletries And Hygene Products
The Castle
The Coffee House
The Collective Dairy
The College Of IT & E-Commerce
The Dry Cleaning Business
The Female Health Company
The Fishermans Arms
The Hummingbird Bakery
The King Escalope
The Kingfisher Press
The London Bakery
The Metropolitan Police Authority
The Natural Sea Sponge Company Ltd
The Olive Grows
The Organic Pharmacy
The Park Royal Garage
The Performance
The Polish Bakery
The Printed Word
The Safety Supply Company
The Skiwear Service
The Soundhouse
The Spice Land
The Synthesizer Co Ltd
The Transport Exchange Group
The United Distribution Company
The World Of Yachts And Boats Ltd
Thomann Hanry
Thomas Charles Joinery Ltd
Thomson Motors Accidental Repair Centre
Threadmill Clothing Ltd
Three Colours Limited
Tikit
Tile Land Ltd
Tiles And Bathroom Right Ltd
Timeless Bespoke Designs Ltd
Times Immigration Consultants Ltd
TK Trading / Yoshikawa Group Ltd
TNT
To Sky Ltd
Toga Plant Hire Ltd
Tommy Flynn's Bar And Steakhouse
Tony Fowkes Automobiles
Tony Zreik
Tool Station
Top Supplies
Top Tiles
Top Trenz Ltd
Tophandys Ltd
Topps Tiles
Torpedo Factory Group
Total Façade Solutions Limited
Total Floor Heating
Touchstone Imports
Touchstone Worktops Ltd
Toughglaze (UK) Ltd
Toughglaze Ltd
Touracar Ltd
Tower Of Faith
Tower Transit
Trading Post Ltd
Transcom Telecom Ltd
Transputec
Travelodge Hotel
Travelodge Hotels Ltd
Trendy Living
Trevor Howsam Ltd
Triple A Accountancy Services
Troy Systems Limited
Trumax Cars Ltd
TSN Hire Car Ltd
TT Motors
Tucker French
TVS Foods UK Ltd
Tyre Spot
UK 3 B Scientific Ltd
UK Coldstore
UK Star Tyres
UK Tyres
UK Visa Centre Ltd
Unbloc Drainage Engineeers Limited
Uncle Cheff
Uncle Jim
Uni-Care
Uniflora
Unimix Management
United Cater Ltd
United Trade & Services Limited
Unitrust Protection Services (UK) Limited
Unity Care & Training Consultancy Ltd
Universal Display
Upcakes
Ur Refrigeration Wholesale Ltd
Urban Cow Ltd
Urc Car Repairs
Uttam London
Vale Inco Ltd
Valimex (Import & Export) Ltd
Vascroft Constructors Ltd
Vaspa Double Glazing
Vb & Sons
Vcn
Vdc
Vehicle Pound For Brent And Hounslow Councils
Veloci London Ltd
Venus Concept
Venus TV
Verona Marble Ltd
Vh Insurance Services Ltd
Vhl Catering
Viakeys
Video Duplicating Co. Ltd
Vigilant Security Services UK Ltd
Virdee Autos
Visionmed Ltd
Vivalda London
Vivo Technologies Ltd
V-Max Mechanics
Vmi
Volumetrics
Wembley Quality Cars / Europe Prestige / #1 Mechanic Services
West London Art Factory
Westbourne Cars
Westbridge College
Western Solutions Ltd
Westfield Auto Centre
Westwood Fabrications
Westwood Joinery
Wf Senate Park Royal Branch
Wft Ltd
What A Load Of Rubbish Ltd
White Fuse Media
White Rose Laundries Ltd
Whitneys Of Willesden
Wigmore Home
Wigmore Medical
William Hill Bookies
Williams And Hill
Williams, Chartered Accountants
Wingman Group
Wolseley
Women's Support Association
World Food Aid Limited
World Net
World Of Tiles And Bathrooms Ltd
Worldwisetrading Ltd
WPL
Wrapology
Allbees
Xara Computers UK Ltd
Xinhua Bookstore (London) Ltd
Yaash Motors
Yakitori King
Yek O Yek
Yorpien Skip Ltd
Yuriko Hill Potter
ZA Tyre Works
Zagros Cafe
Zanardia
Zen
Zen Builders
Zenith Distribution
Zentron
Zepbrook
Zinc Design Ltd
ZM Motors
Zone Lest Motorcycles

CONTEXT



CONTEXT

HISTORICAL CONTEXT

The area's "royal" title derives from its use as the showground for the Royal Agricultural Show (1903-1905). The show was officially opened by the then Prince of Wales (later George V), who allowed the area to take the name "Park Royal". However, despite on-going royal patronage, the shows were increasingly sparsely attended, forcing the Royal Agricultural Society to sell the showground in 1905.

It is here that Park Royal's familiar industrial character begins to emerge, with the area being used as munitions factory during World War I. Early industrial developments tended to be characterised by large factory complexes specialising in the manufacture of automobiles, electrical machinery, as well as food and alcohol. By 1932 there were 73 factories, employing 13,500 workers on site. Park Royal's steady growth was aided by the relatively light bomb damage sustained during World War II, in stark contrast to the devestation wrought on many of London's other industrial heartlands. Industry continued to boom in the post-war period and by the 1960s the area employed more than 45,000 people.

London's Kitchen

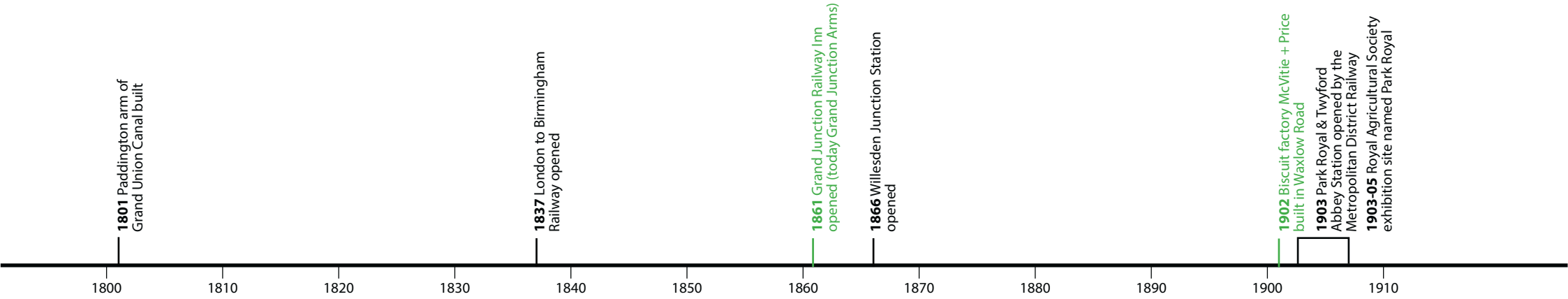
However, by the 1970s Park Royal was facing large-scale industrial restructuring, as well as general industrial decline. Many of the multinational firms, the area's largest employers, chose to relocate, and by the early 1970s around 70 larger firms left Park Royal and the nearby Wembley Estates. Important local employers such as Heinz could only survive by cutting staff numbers from 3,500 to 500, before eventually relocating in 2000. The Guinness Factory was subject to a similar process of downsizing before finally closing in 2005.



Diagram showing Guinness' Park Royal Brewery operations (1998)

fig. 3 Park Royal TIME LINE, part 1

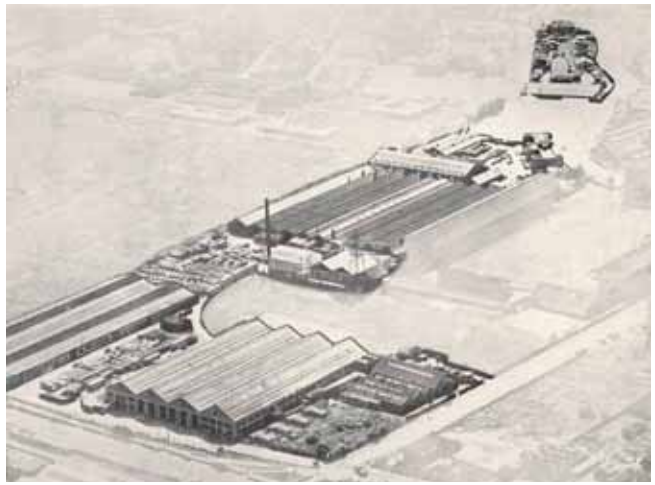
General history, infrastructure
Business history
Planning history





© IWM (Q 31312)

Women munition workers filling machine gun belts with 0.303 inch ammunition at the National Box Factory (1917)



Source: www.prv.org.uk

View of Park Royal Vehicle Ltd in PRV Export Brochure (c.1940)

fig. 4 Park Royal Time Line, part 2

General history, infrastructure
Business history
Planning history

1914-18 Munitions factories built in Willesden Lane and Victoria Road
1919 H. J. Heinz & Co. canned food factory opens on Waxlow Road
1920 - 1930 Construction of the Western Avenue (A40)
1923 Rank Hovis McDougall Foods moves to Victoria Road
1924 Park Royal Vehicles factory begins production
1931 Park Royal Hospital becomes Central Middlesex Hospital
1931 Park Royal Station built on the newly laid out Western Avenue
1933 Construction begins on Gilbert Scott's Guinness Brewery
1939 Elizabeth Arden cosmetics moves to Wales Farm Road
1940 Park Royal Coachworks begin production of Halifax bombers
1952 Heinz is the largest business in Park Royal with 1,500 employees
1960s Park Royal employs 45,430 people
1975 Lebanese civil war sees start of growth of Lebanese community
1977-83 Economic decline - bankruptcies, closures, redundancies
1992 Formation of the Park Royal Partnership (PRP)
1995-2002 Single Regeneration Budget of £8.6m from the Park Royal Partnership
2004 Diageo closes Guinness brewery
2007 Park Royal Land & Premisses Study (LDA) London Rail Freight Stategy (TfL)
2008 PRP Public Realm Strategy
2011 Park Royal Opportunity Area Planning Framework OAPF
2012 Decision for potential Old Oak Common Crossrail Interchange in 2026 announced
2014 Formation of Park Royal Business Group
2018 Crossrail station at Old Oak Common opens

1910 1920 1930 1940 1950 1960 1970 1980 1990 2000 2010 2020



© TfL from the London Transport Museum collection

The London Aircraft Factory at Park Royal Coachworks (1940 - 1946)



© Transport for London

Manufacture of Halifax bombers at Park Royal Coachworks (c.1941)

CURRENT CONTEXT

Many of the large factories that produced everything from beans and beer to bombers and buses have been replaced by or subdivided into smaller industrial units. These are being used by many smaller businesses today. Meanwhile, London has continued to expand into the surrounding sites that had once been open fields.

In recent years strategies and visions have been developed by local authorities, business groups and the Greater London Authority that seek to balance necessary infrastructure investments, housing and real-estate pressures and the important economic role of Park Royal.

The following planning documents have influenced and will continue to influence the development of the Park Royal area:

LONDON PLAN (2011)
Designates Park Royal as Strategic Industrial Location (SIL) and an Opportunity Area for development.

PARK ROYAL OPPORTUNITY AREA PANNING FRAMEWORK (2011)
Establishes a vision for the coherent development of Park Royal.

PARK ROYAL PUBLIC REALM STRATEGY (2008)
Commissioned by the Park Royal Partnership to address the poor quality public realm in the area [status tbc]

OLD OAK VISION DOCUMENT (2013)
Scoping document for the creation of an Old Oak Common Opportunity Area. Looks to spark debate about potential for development around a future Crossrail and HS2 transport hub.

There are also a number of important planning documents that have been adopted by the three local boroughs (Brent, Ealing, Hammersmith & Fulham) and will shape the development of Park Royal. These include:

BRENT
Core Strategy (2010)
Site Allocations (2011)
Alperton Masterplan (2011)

EALING
Core Strategy (2012)
Development Sites (2013)
Development Management Development Plan Document (2013)

HAMMERSMITH & FULHAM
Core Strategy (2011)
Development Management Development Plan Document (2013)
Proposals Map (2011)
Planning Guide Supplement Planning Guidance (2011)

METHODOLOGY



METHODOLOGY

SURVEY

The *Park Royal Atlas* uses a mix of quantitative and qualitative research techniques. Maps, graphs and case studies are used to paint both a broad yet detailed picture of Park Royal's economy. The Atlas is based on a door-to-door survey combined with observation, structured interviews and photographs to provide a more nuanced understanding of how Park Royal "works".

The survey was carried out over 5 weeks, with teams of two researchers covering a particular area. Teams were made up of one of four core researchers and a guest researcher, volunteers from either the GLA or one of the local boroughs. Totalling 525 man-hours, the survey collected a wide range of information at three levels of detail:

Quantitative and qualitative research

LEVEL 1 SITE DATA
Data was gathered on each employment site, whether an industrial estate or other geographical grouping of workplaces.

- Allocated site ID on map
- Site name
- Site address
- General condition (very poor to very good)
- Contribution to character of area (negative, neutral or positive)
- Additional notes

LEVEL 2 OBSERVATIONAL DATA
Within each employment site data was collected on individual workplaces via a structured observational study.

- Allocated business unit ID on map
- Name
- Address
- Phone number
- Webpage / Email Address
- Primary Activity (to establish SIC category)
- Space type (small or large office, workshop, small or large warehouse, yard, other)
- Unit shared by workplaces
- Size estimate of employment (micro, small, medium or large)
- Basement floor area multiplier of workplace footprint
- Ground floor area multiplier of workplace footprint
- Upper floor area multiplier of workplace footprint
- Notes on business
- Case study rating

2150 workplaces surveyed

245 businesses interviewed

LEVEL 3 STRUCTURED INTERVIEWS
14% of all businesses in Park Royal were interviewed. The interview questions covered the following themes:

- Type of business (Independent, headquarters, branch or franchise)
- Number of employees
- % of employees from local area (Brent, Ealing, Hammersmith and Fulham)
- Years at location
- Year business established
- Supplier locations
- Customer locations
- Anticipated employee requirements in one year
- Anticipated floorspace requirement in one year
- Premises tenure
- Production figure for last year
- 3 Advantages of location
- 3 Improvements for location
- Notes for case study

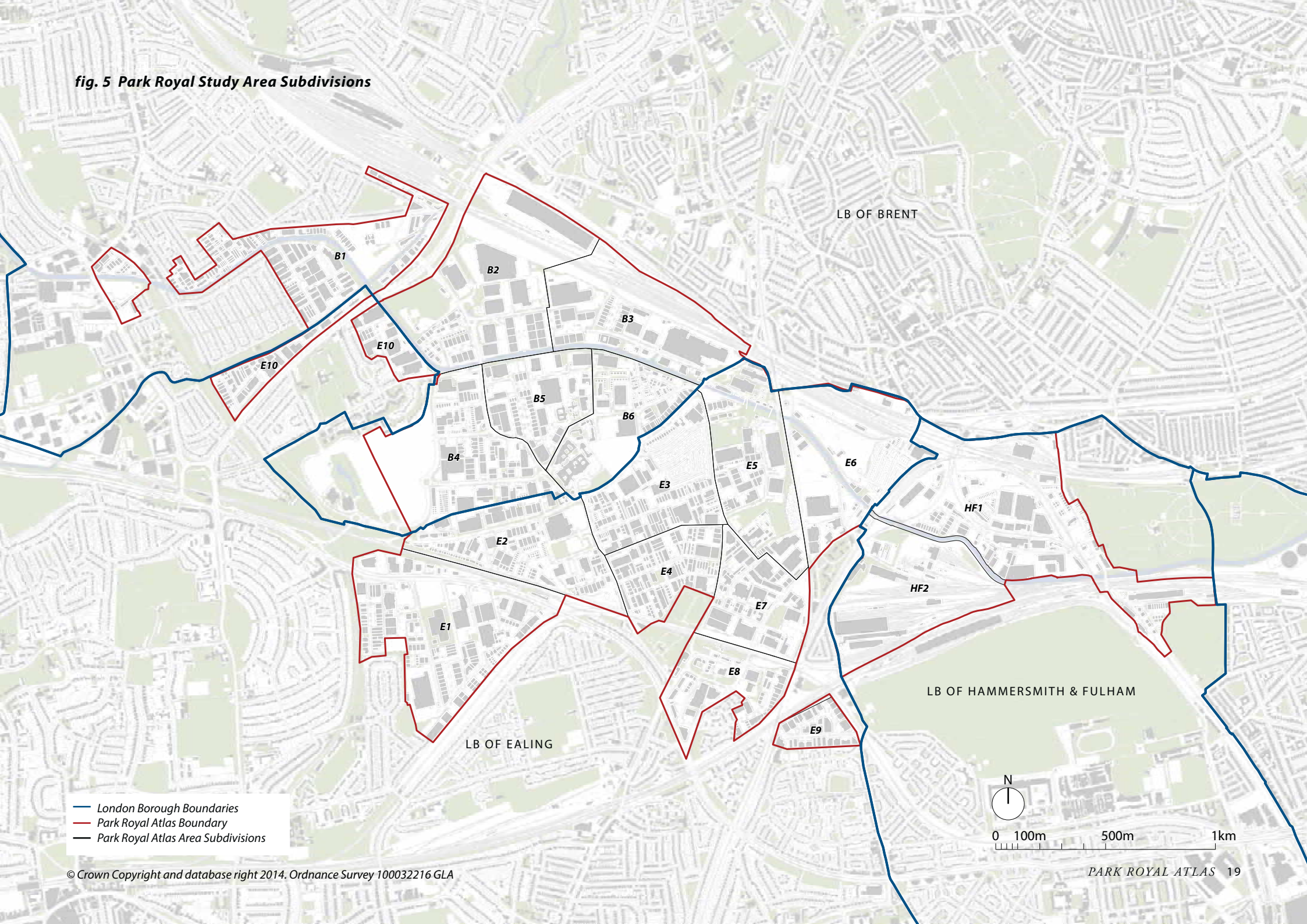
The data was collected on paper forms and then inputted by the researchers into a central database via a digital form. This database was then corrected and cross-checked with the maps prior to analysis.

MAPPING

The *Park Royal Atlas* study area is based on the Strategic Industrial Land boundary from the London Plan (2011), with the addition of some immediately adjacent industrial land. For the administrative purposes of this study the area was divided into 18 separate study areas, B1-B6 in Brent, E1-E10 in Ealing and HF1-HF2 in Hammersmith and Fulham (fig. 5).

During the door-to-door survey employment sites and businesses were marked on paper maps. This information was then used to update the detailed Ordinance Survey map of the area using GIS software. Footprint areas of individual workplaces were measured from the updated Ordinance Survey map, before being muliplied by the number of floors occupied (information gathered during the survey). This provides a more accurate approximation of the gross floor area occupied by each business.

fig. 5 Park Royal Study Area Subdivisions



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CATEGORIES

BUSINESS SECTORS

For analysis and mapping the main activities of businesses were categorised using the Standard Industrial Classification 2007 (SIC) which also allows for future comparison with other government business data. These categories were then regrouped into 19 distinct categories (fig. 6) with each category allocated a unique colour in order to identify it on the map.

However, these sectors cannot provide a completely fool-proof means of classification, as the choice of what to include or exclude from any category is subject to a degree of interpretation. For instance, although the vast majority of Park Royal's substantial film industry is found in the *K Information and Communication* category, the 37 specialist film equipment and prop hire firms are categorised as *M Services Other*. These businesses have been categorised according to their primary business activity - the renting and leasing of specialist equipment - which masks their evidently strong links to the film industry. Similarly, the area's many catering firms are not classified as *A Manufacture Food*, instead becoming a subset of the *O Retail Restaurants Hotels* category.

fig. 6 Business Sectors

A Manufacture, food	Breweries, bakeries, biscuit factories, roasteries
B Manufacture, metal	Steel refineries, sheet metal workshops
C Manufacture, reproduction	Print shops, sign makers, print finishers
D Manufacture, other	Joineries, jewellers, cobblers, umbrella makers
E Utilities	Recycling plants, carbreakers
F Construction	Contractors, road pavers, joiners
G Vehicle Sale and Repair	Garages, car showrooms, car restoration
H Wholesale Food	Wine import, spice merchants, fish suppliers
I Wholesale Other	Electronics wholesalers, medical suppliers
J Transport and Storage	Railway sheds, self storage, couriers
K Information and Communication	Publishers, film studios, software developers
L Services Professional	Lawyers, bankers, accountants, head offices
M Services Other	Chauffeurs, travel agents, prop hire, car rental
N Services Public	Hospitals, schools, charities
O Retail Restaurants Hotels	Pubs, shops, hotels, restaurants
P Other Business Activities	Laundries, churches, artist studios
Y Vacant	Empty premises
Z Unknown	Unable to establish business activity
X Other	Non-employment sites

SPACE TYPOLOGIES

The Atlas also maps the types of spaces used by businesses. The space type categories describe the primary space type occupied by the business (gross floor area). Once again there are some inevitable ambiguities. For instance, many large warehouses feature 2 floors of office space on the street facing side. However, since a greater amount of floor space is occupied by the actual warehouse the space is categorised as a Large Warehouse.

Space types were also cross-referenced with their use by different business categories. This provide an overview of the particular spaces that are necessary for different business sectors. This provides the necessary information to cross-reference the businesses with the land use categories used in employment land reviews.

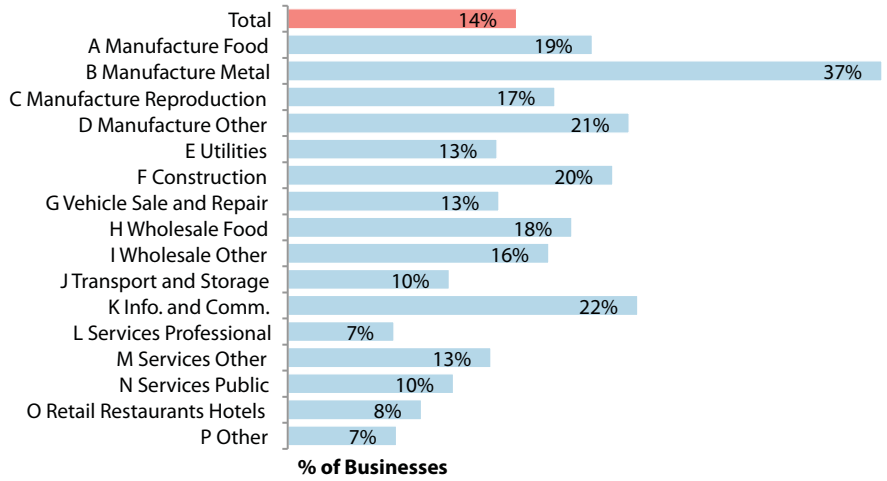
fig. 7 Space Types

1 Small office type space	Desk-work, on any floor, in workplaces smaller than 500m^2
2 Large office type space	Desk-work, on any floor, in workplaces larger than 500m^2
3 Retail type space	Publicly accessible shop type unit with street frontage
4 Workshop type space	Light industrial or studio type unit on any floor, with no purpose built loading bay
5 Small warehouse type space	Purpose built industrial unit with loading bay, smaller than 500m^2
6 Large warehouse type space	Purpose built industrial unit with loading bay, double height ceiling, larger than 500m^2
7 Yard	Contained open space with only temporary or small buildings on site
8 Other	All other structures

INTERVIEW RATES

Given the door-to-door nature of the survey, interviewees were chosen on an *ad-hoc* basis. In total 14% of Park Royal's workplaces were interviewed. However, there are noticeable differences in the interview rates across the different business sectors ranging from 6% in professional services to 38% in metal manufacturing. This range a was largely due to the availability and accessibility of certain business types. For example, many professional service workplaces were in small offices located on the upper floors of buildings that were difficult to access. By contrast, manufacturers tended to be located in ground floor units that tended to be more visible and accessible.

fig. 8 Interview rates by business sector



LIMITATIONS

The door-to-door survey lists every workplace that could be found by the researchers in Park Royal by visiting every building. Although as many workplaces as possible were visually verified, it was not possible see inside every workplace. Therefore some of the workplaces listed are based on information from signs and door listings, some of which were later verified by desk-based research.

Workplaces were marked as unknown if there was evidence of occupation but the business name and activity could not be established. In some cases, paticularly where buildings had been subdivided into multiple premises, buildings were not accessible and it was difficult to establish the exact number of units or how many of these were occupied. In these cases it was also more difficult to estimate the proportion of the building footprint area used by individual workplaces.

While much effort has been put into collecting the data in a consistent manner the involvement of various temporary and guest researchers means that there may be some inconsistencies, although selective corrections have been made to the database. Despite these limitations we are confident that the Park Royal Atlas provides both a robust overview and revealing insights into employment in Park Royal.

SURVEY ANALYSIS



SURVEY ANALYSIS

BUSINESS SECTORS

The door-to-door survey for the *Park Royal Atlas* located 2150 workplaces. 1934 of these were active, and of those the names and activities of 1717 could be identified. The distribution across the business sector colour groups is relatively even, ranging from 14% in manufacturing (sectors A-D) to 18% in services (sectors L-N).

It is estimated that the workplaces in Park Royal contain 2,300,000m^2 of gross floor area, including all floors. In terms of floor area, the proportion of the business sectors shift significantly compared to the number. Manufacturing (sectors

Patchwork of business sectors

A-D) increase to 20%, while wholesale, transport and storage (sectors H-J) 27% of the total gross floor area. These business sectors clearly require larger workspaces to operate successfully.

The map in fig. 11 shows the geographic distribution of the sectors. One of the map's most striking elements is the diverse patchwork of workplaces found across Park Royal. While some areas have larger workplaces, others are characterised by a much finer grain, of small, individual workplaces as well as larger buildings that have been subdivided.

Wholesale, transport and storage use 27% of floor area

Mapping the business sectors highlights the many workplaces in the manufacturing, wholesale and storage and transport sectors requiring large building footprints. Many of these are involved in the manufacturing and wholesale of food. While there are some obvious clusters of larger workplaces, particularly in the food manufacturing sector, there are also many smaller scale clusters of micro food businesses. These are often located within single buildings and therefore cannot be distinguished on the map.

While vacant and unknown workplaces each make up 10% each of the total workplace number, vacant workplaces only make up 8% of the floor area.



fig. 9 Total Number of Workplaces

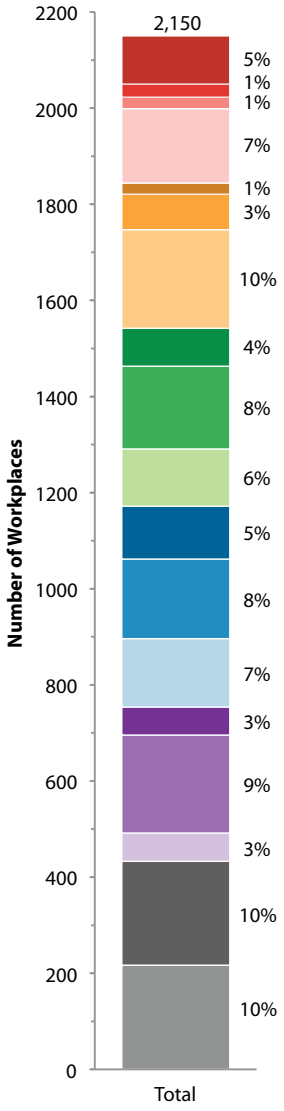


fig. 10 Total Area of Workplaces

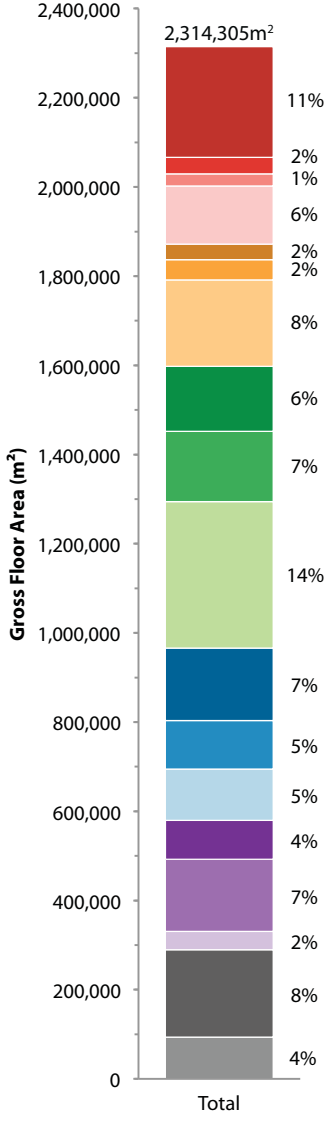
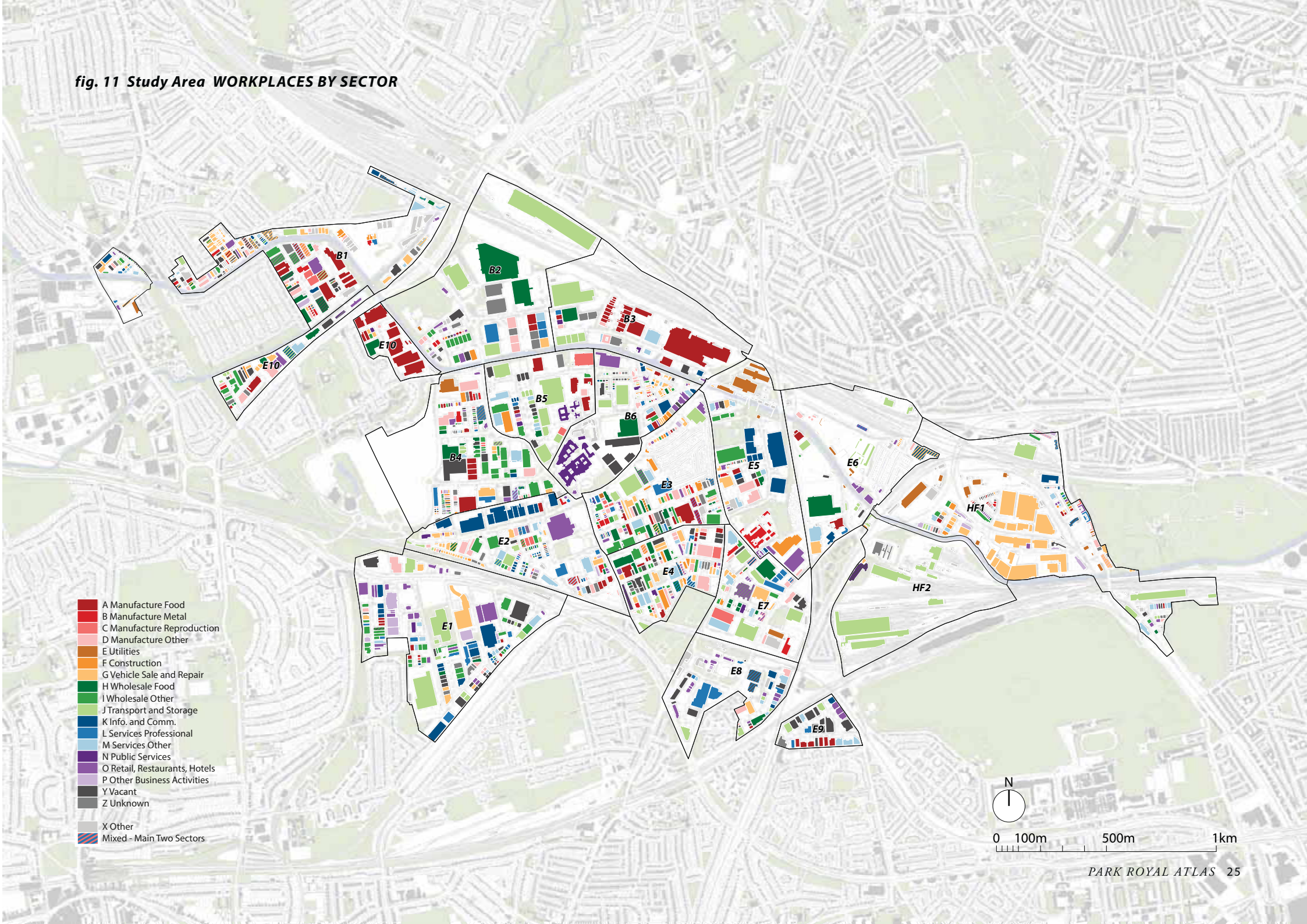


fig. 11 Study Area WORKPLACES BY SECTOR



BUSINESS SECTORS BY BOROUGH

The varied nature of workplaces in Park Royal is reflected in the breakdown of workplace numbers and areas by borough in fig. 12 and fig. 13.

BRENT *B1-B6*
Brent contains 35% of Park Royal's workplaces by number and 38% by gross floor area. The central area (*B2* to *B5*) hosts a number of sizeable business parks with some of the largest workplaces. By contrast, *B1* - at the eastern end of Park Royal - has the highest density of workplaces. The area is characterised by older brick buildings that are often subdivided into smaller workplaces, occupied by a large number of small independent car sale and repair businesses. Similar buildings and businesses are found at the north end of *B6*, one of the earliest industrially developed areas of Park Royal.

EALING *E1-E10*
Ealing accommodates the largest number of Park Royal's workplaces with 54% by number and 51% by floor area. The central areas *E3*, *E4* and *E7* consist mainly of modest and smaller warehouses. Although often in relatively poor condition, they host a large variety of smaller, mostly independent businesses. Many buildings have been subdivided into multiple workplaces that are not always easily identifiable. Food manufacturing and food wholesalers are prevalent, alongside a number of cafes and restaurants. The areas around this centre (areas *E1, E2, E5, E6, E8 and E9)* tend to have a greater number of larger and newer buildings, often situated within business parks or industrial estates.

HAMMERSMITH AND FULHAM *HF1-HF2*
The eastern extremity of the Old Oak Common area is largely cut off from the rest of Park Royal by several intersecting railway lines. The area itself is divided by the Grand Union Canal, with the south bank dominated by large railway yards and depots, while the north is primarily occupied by a large used car retailer and two waste recycling sites. Wedged between these larger occupants are a number of smaller warehouses, offices and workshop units accommodating a wide range of smaller businesses, including a number of artist studios.



fig. 12 Workplaces by Borough

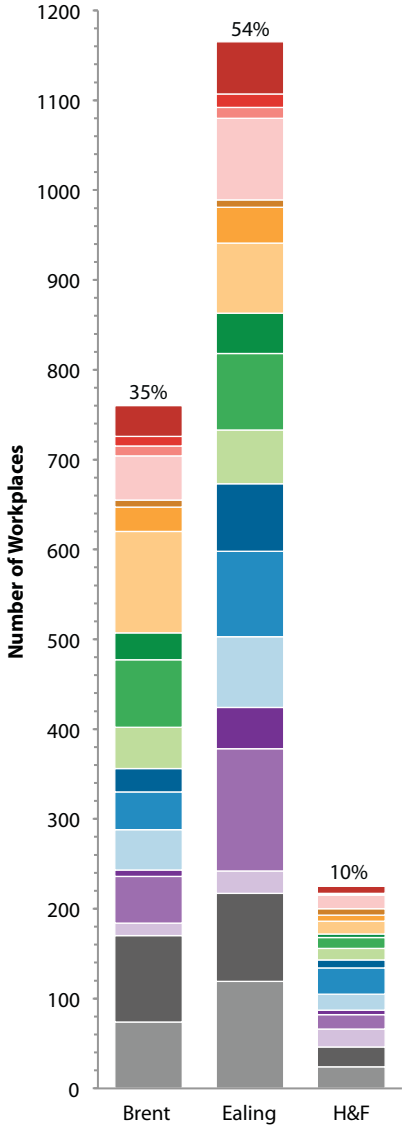
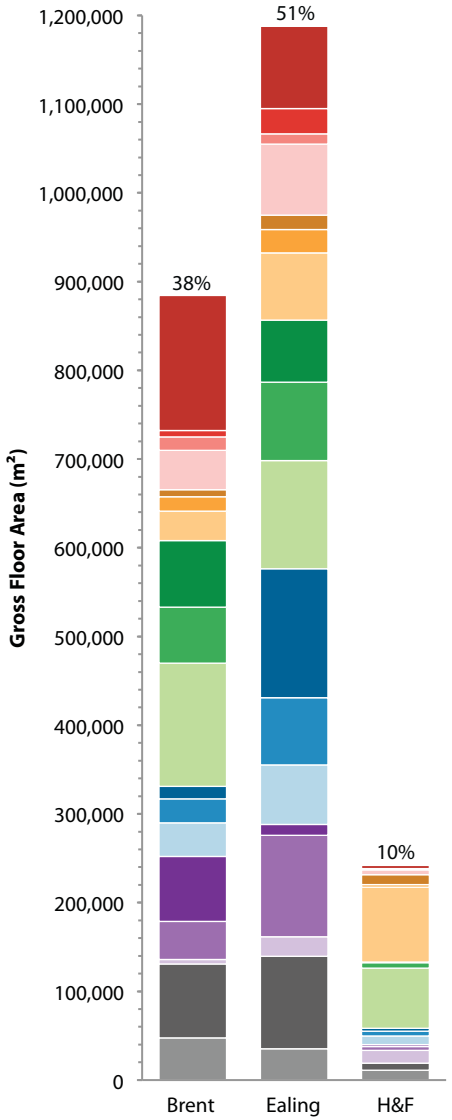


fig. 13 Gross Floor Area by Borough



WORKPLACE SIZE

It is estimated that 75% of all the known workplaces in Park Royal are micro businesses. These are businesses with less than ten employees, although many have no more than one or two. The vehicle sale and repair category alone constitutes 15% of all micro businesses, closely followed by Retail, Restaurant and Hotels (14%). Otherwise there is a relatively even distribution of workplaces across the other business sectors.

75% of workplaces are micro businesses

Small businesses make up 20% of all workplaces, while only 4% of workplaces are medium-sized businesses. The 1% of workplaces that are large businesses is made up of only 19 businesses. These include a number of large food manufacturers like Bakkavor, a ready meal manufacturer, and several industrial bakeries like McVitie's, perhaps the largest household name to be based in Park Royal. Other noteworthy employers are the Central Middlesex Hospital, a major Royal Mail distribution centre , and the UK headquarters of Carphone Warehouse, currently Park Royal's largest employer (1200 employees).

It is estimated that approximately 31,000 people work in Park Royal. This was based on the estimated numbers of workplaces by size and employee numbers (obtained via the structured interviews). SMEs (businesses with less than 250 employees) make up 58% of the overall employment in Park Royal.

An estimated 31,000 people work in Park Royal

fig. 14 Estimated Number of Workplaces by Size

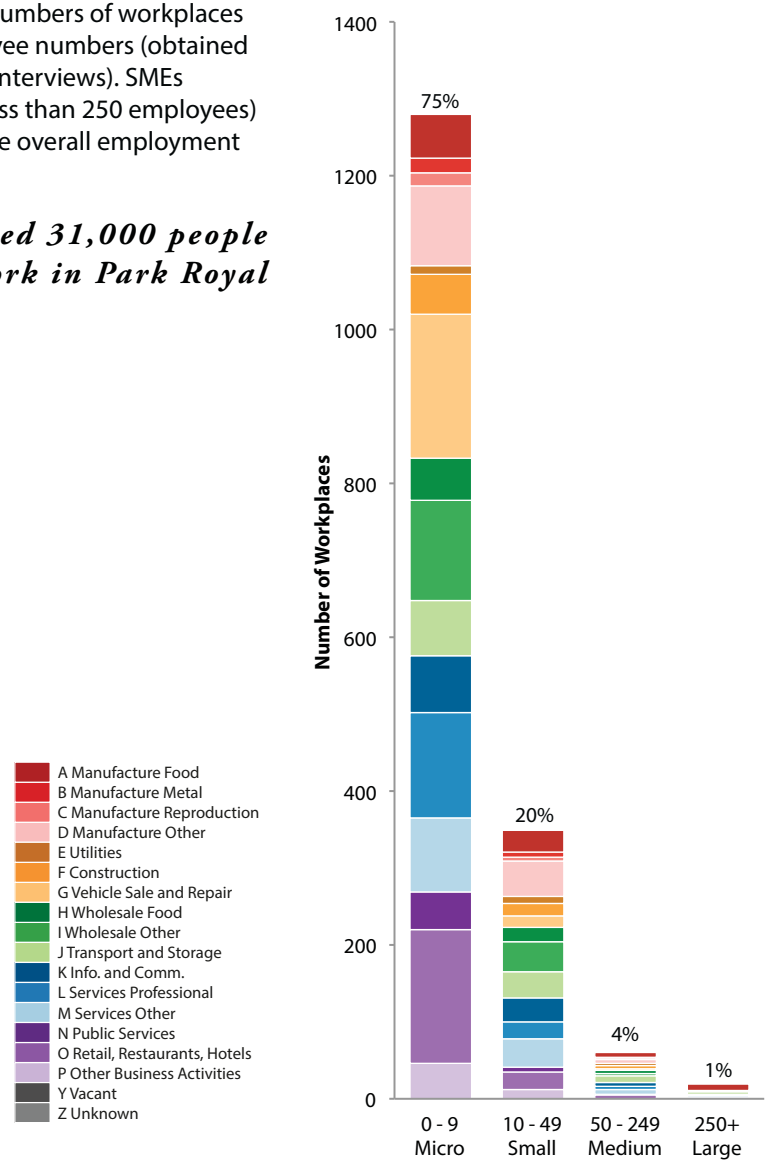
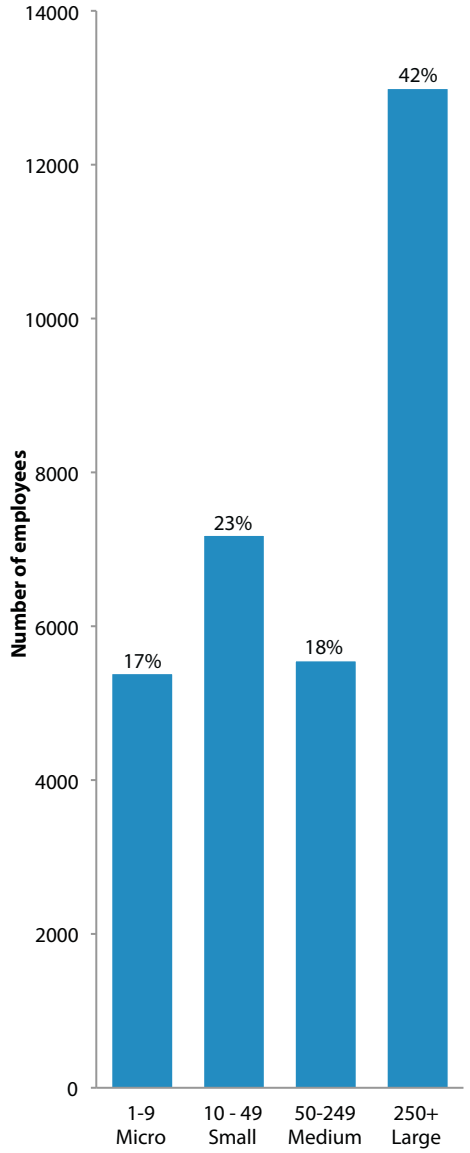


fig. 15 Estimated Employment Numbers by Workplace Size



SPACE TYPES

Mapping the space types of the workplaces helps us to understand their particular spatial requirements. In terms of total workplaces, small offices are the most ubiquitous space type (30%). The numbers in fig. 16 show that overall there are a similar number of businesses using office type spaces (37%) and warehouse type spaces (39%). More flexible workshop type spaces make up 16% of the total, while retail type spaces with street frontages constitute only 4%.

70% of floor area is warehouses

However, when looking at the total floor area occupied the story changes significantly (Fig. 23). Small office type space only makes up 4% of the total floor area, whilst warehouse type spaces take up 70%. The floor space occupied by workshop and retail spaces area are relatively small (5% and 1% respectively). Other space types increase their proportion to 4%, largely due to the large footprint of the Central Middlesex Hospital and a handful of hotels.

Business sectors spread across space types

The map (fig. 18) showing various space types highlights the predominance of warehouse type spaces across much of Park Royal. It also highlights the higher concentration of office space in areas where older and smaller buildings tend to be located, such as areas *B1, E3, E4, E7* and *E9*.

fig. 16 Space Type Numbers

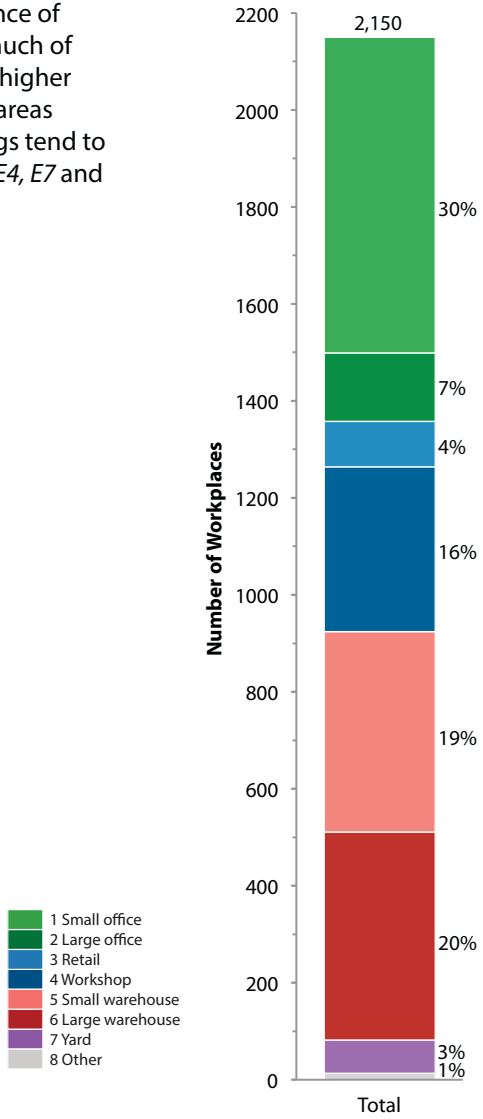


fig. 17 Space Type Areas

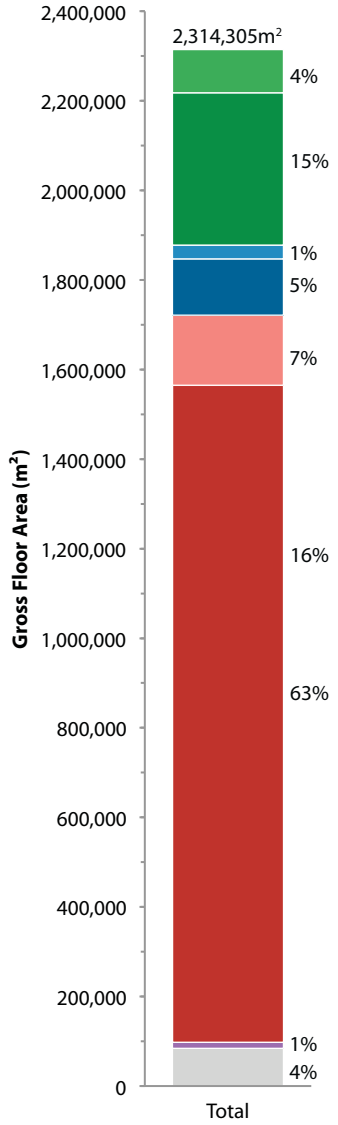
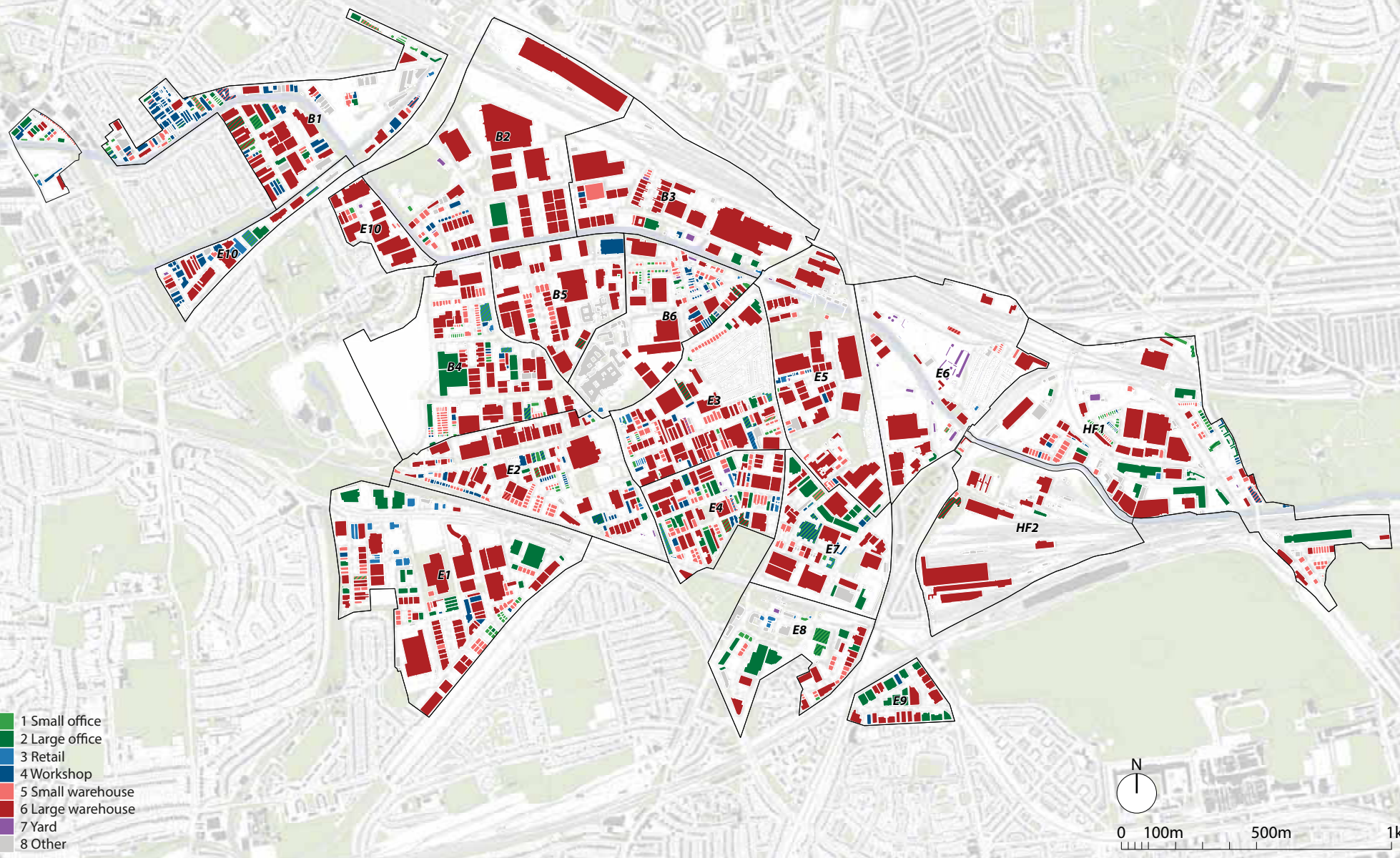


fig. 18 Study Area Space Types

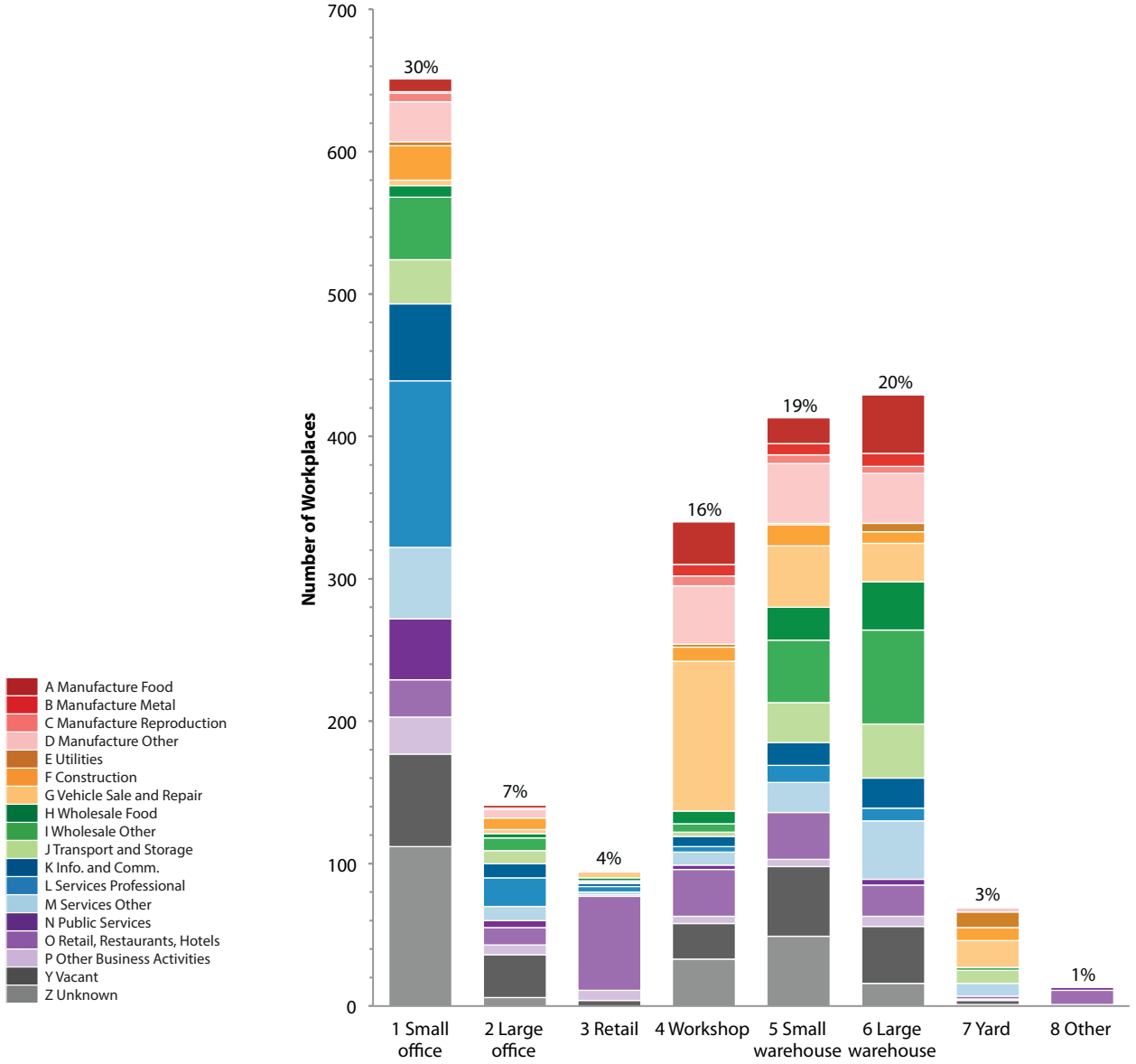


SPACE TYPES BY SECTOR

The diverse range of business sectors using each space type is demonstrated in fig. 19. Although info. and comms. and services are the largest users of office type space, all the other sectors, including manufacturing and transport, also use office type spaces. While the wholesale and transport sectors are the biggest users of warehouse type spaces (28%), all other sectors, including services and retail also use them. Workshops are also used by a diverse range of business sectors; however, the car sales and repair sector is the predominant user (31%).

While the overall rate of vacant workplaces is 10%, large office type spaces have the highest number of vacancies (21%). At the same time the vacancy rates for the smallest categories are very low, including workshops (7%), retail (4%) and yard type spaces (4%).

fig. 19 Numbers of Businesses by Space Type



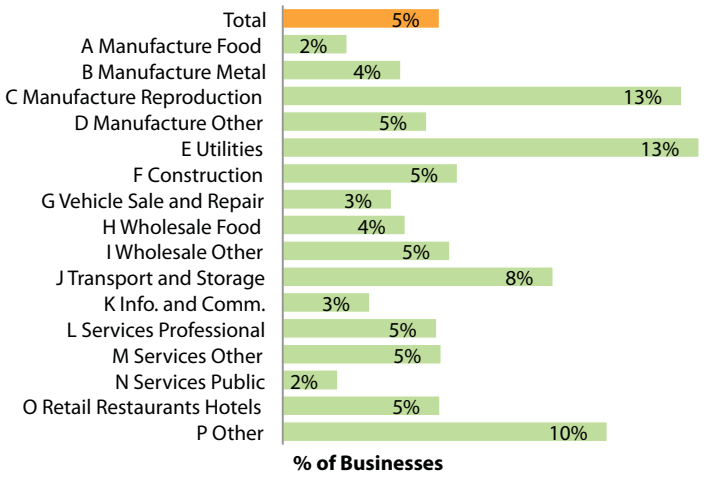
SHARING PREMISES

While the vast majority of workplaces are sole occupiers of their premises, 84 of the 1717 businesses (5%) in Park Royal share their premises with another workplace (fig. 20). However, this number does not include the sharing of buildings that have been subdivided into multiple premises.

Shared premises were rare amongst food manfacturers, a product of strict hygiene controls. However, while the sharing of premises is lowest in this sector (2%), this does not take into account a number of managed commercial kitchens, which rent out small kitchen spaces to multiple micro businesses for short durations. Above average sharing of premises is seen in the utility, construction and transport and storage sectors where businesses will often share exterior yard spaces.

2% of food manufacturers share their premises

fig. 20 Proportion of Businesses Sharing Premises



SURVEY AREAS



AREAS B1 E10



Otherwise known as Alperton, *AREA B1* forms the north-west corner of Park Royal. Bounded by the river Brent and North Circular (A406), the area has the smallest average gross floor area per workplace in Park Royal, around 500m^2, compared to an average of 1,000m^2. By far the highest proportion of workplaces is in the vehicle sale and repair sector (fig. 21). However, these workplaces use relatively little floor area compared to much larger floor areas in the food manufacturing sector.

AREA E10 is located along the North Circular. The eastern side is composed of large warehouse units - modest but well-designed brick buildings - for the most part occupied by large food manufacturers. Facing onto the North Circular are a row of large buildings, including a hotel, several retail stores and a business centre with over 100 small workplaces, many of them broadcasting companies and international charities. Although the buildings in the area's western corner seem old and run-down they are occupied by a range of workplace sectors including food manufacturing, various wholesalers and the last remaining gambling machine manufacturers from what used to be a hub of this industry.

fig. 21 Number of Workplaces by Survey Area

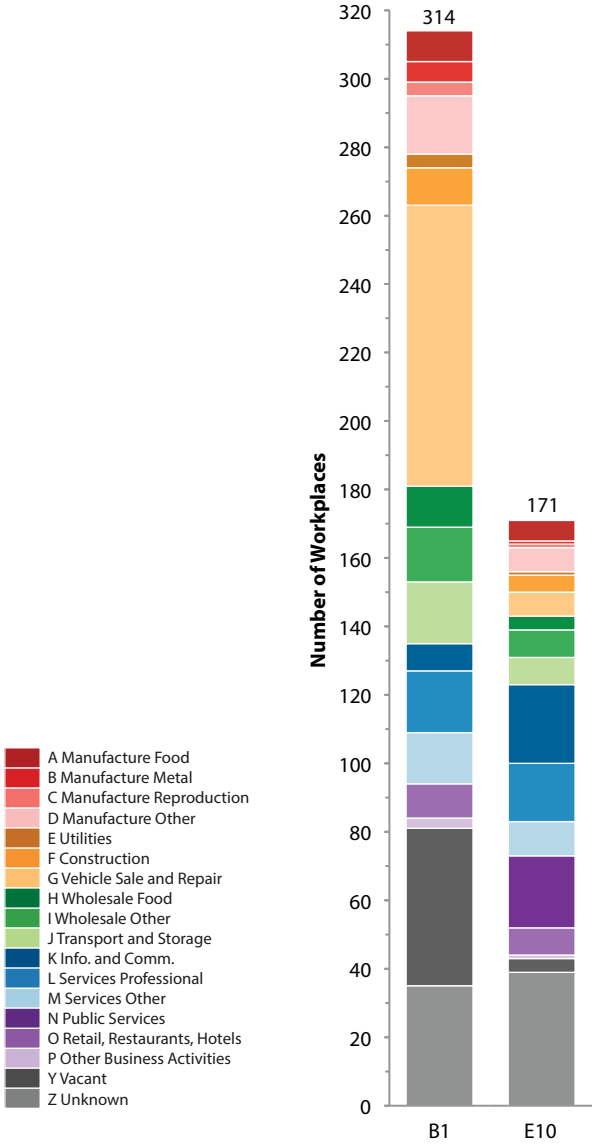
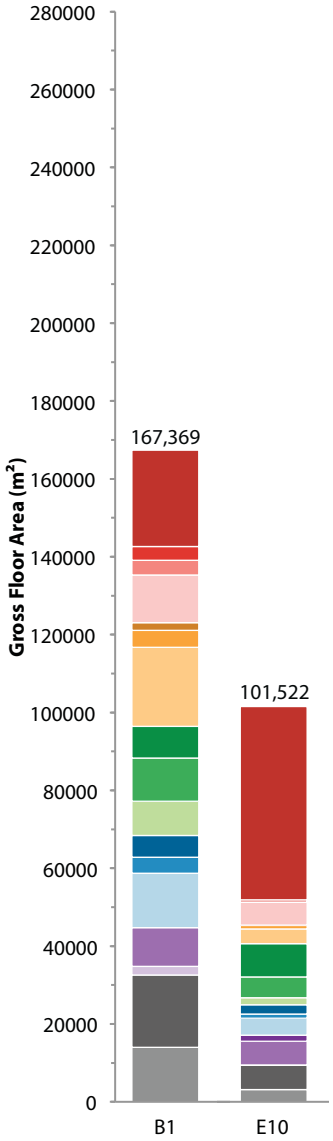
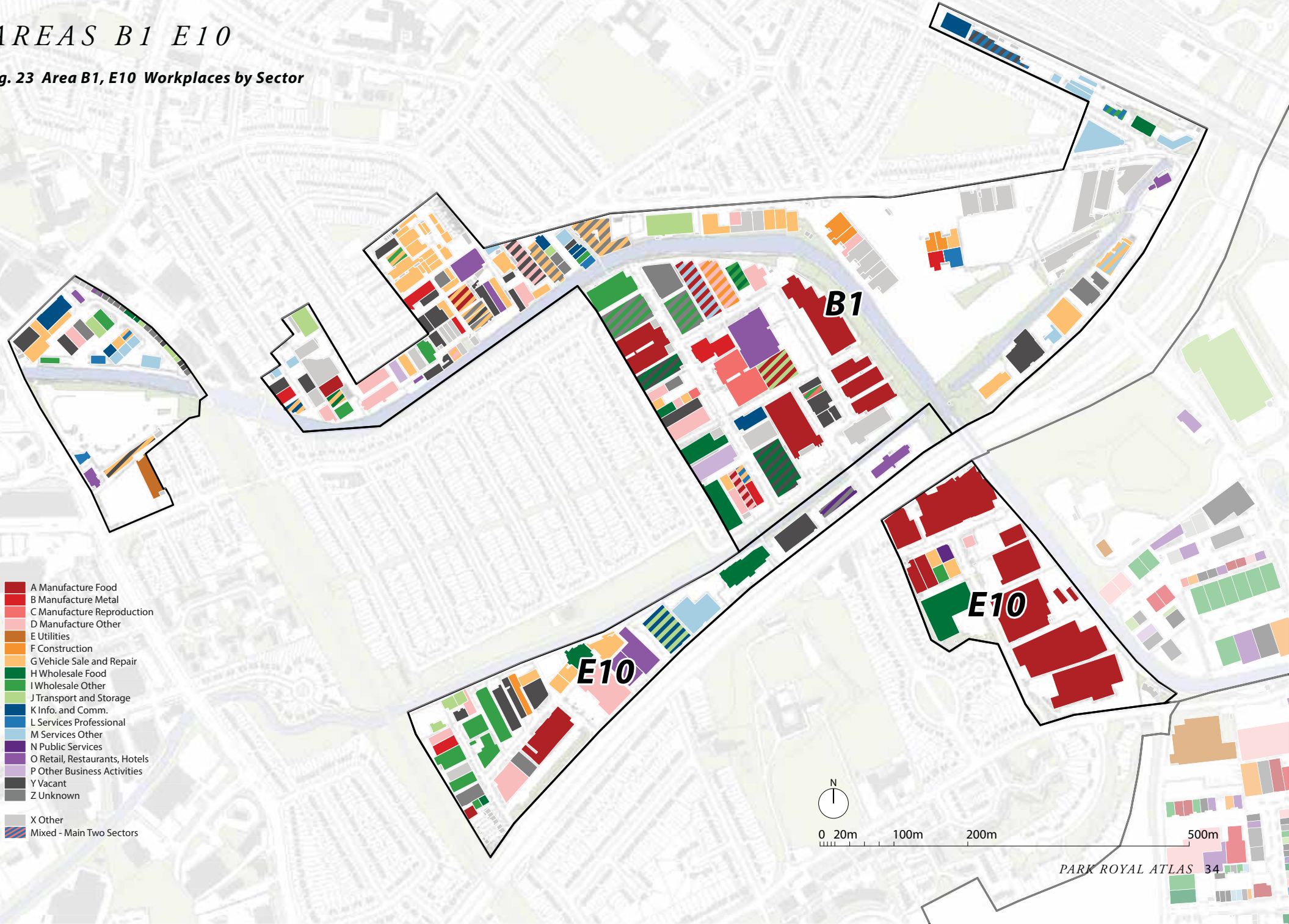


fig. 22 Gross Floor Area by Survey Area



AREAS B1 E10

fig. 23 Area B1, E10 Workplaces by Sector



AREAS B1 E10



























CASE STUDY QBS Software

AREA B1
Computer software distribution
K. Information and Communication

QBS Software are one of Europe's leading software distributors, and have been located in Wharfside since 2001. At the moment they employ just over 40 people and have a turnover of £10 million. The company owns the unit on Wharfside, which they use as their primary office space. Having decided to invest in their current location, due to its good location and relative affordability, the company owner is particularly unhappy with the general condition and cleanliness of Wharfside. The estate was often extremely untidy, creating a bad first impression for any visiting customers or suppliers. As a result the company is considering relocating to another area, but only if they can find office space that is similarly affordable and with equally good transport links.

DATA
40 EMPLOYEES
13 YEARS ON-SITE
27 YEARS IN THE BUSINESS
440 SQ.M. GROSS FLOOR AREA
£10 MILLION ANNUAL TURNOVER

CASE STUDY Ace Café

AREA B1
Biker café and restaurant
O. Retail Restaurants Hotels

Few businesses in Park Royal can claim to have quite the same legendary status as the Ace Café. First opened in 1938, the café has always been oriented towards the passing motorists on the North Circular (A406). By the mid-1950s the café had become an (in)famous hangout for bikers, attracted to the café's 24 hour opening times, its proximity to the A406, and perhaps most importantly, a jukebox playing the latest Rock 'n' Roll hits from America. Although the original café closed in 1969, it was reopened in 1997 with the help of Brent council and has gone on to win a gold medal in the local borough's "Best Bar None" award. Over the past 17 years the café has continued to grow, producing their own merchandise, sausages and even tea bags. Mark Wilsmore, the founder, told researchers that while they have been growing as a company elsewhere, the business is inextricably linked to their current location.

DATA

50 EMPLOYEES IN SUMMER,
25 IN WINTER
6 YEARS ON-SITE
17 YEARS IN BUSINESS
640 SQ.M. GROSS FLOOR AREA
£1.5 MILLION ANNUAL TURNOVER

AREAS B2 B3



Sandwiched between the Grand Union Canal to the south and the Willesden / Brent train sidings to the north, *AREA B2* is dominated by large private business parks, Premier Park being the largest. Other large workplaces include a major Royal Mail distribution centre. Wholesale, transport and storage are the predominant workplace sectors (fig. 24). The area is also home to one of the Park Royal premises of Bakkavor, an Icelandic owned company manufacturing ready meals for UK supermarkets.

Entering *AREA B3* via Acton Lane you come across the Grand Junction Arms - one of the few pubs in Park Royal - that has been on its current site since 1861. Just north of the Canal is one of Park Royal's oldest and largest manufacturers, biscuit maker McVitie's, which has been based in Park Royal since the early 1990s. There are also a number of large, recently built warehouse units, including Townsend Industrial Estate. They are primarily occupied by the food industry and sometimes fill the air with a fog of competing smells. The area is also home to Park Royal's fire station.

fig. 24 Number of Workplaces by Survey Area

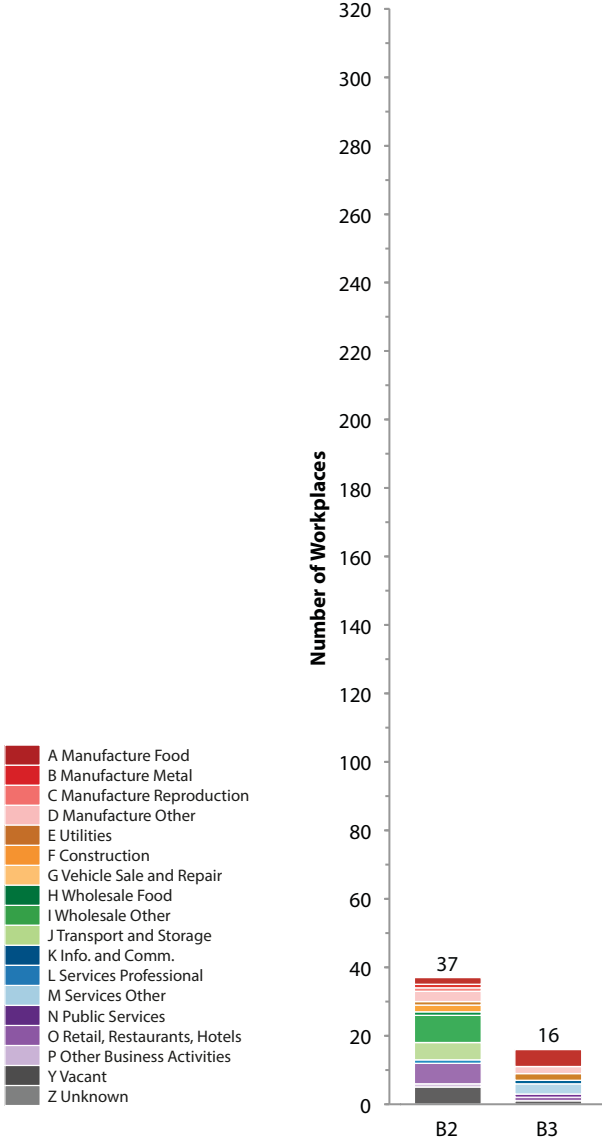
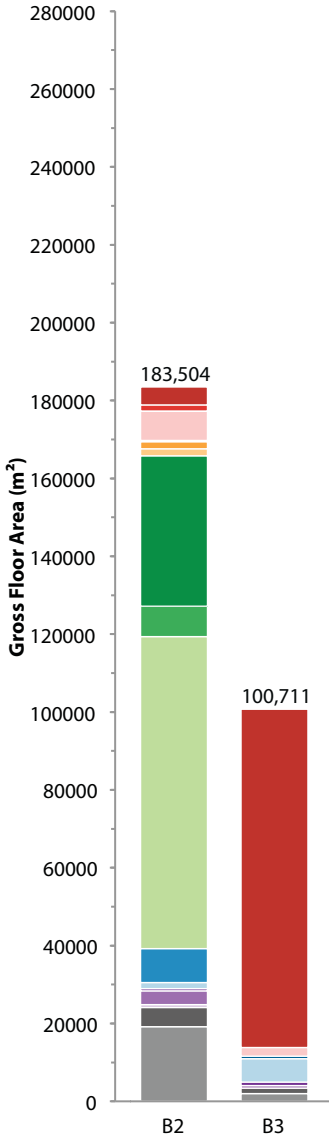
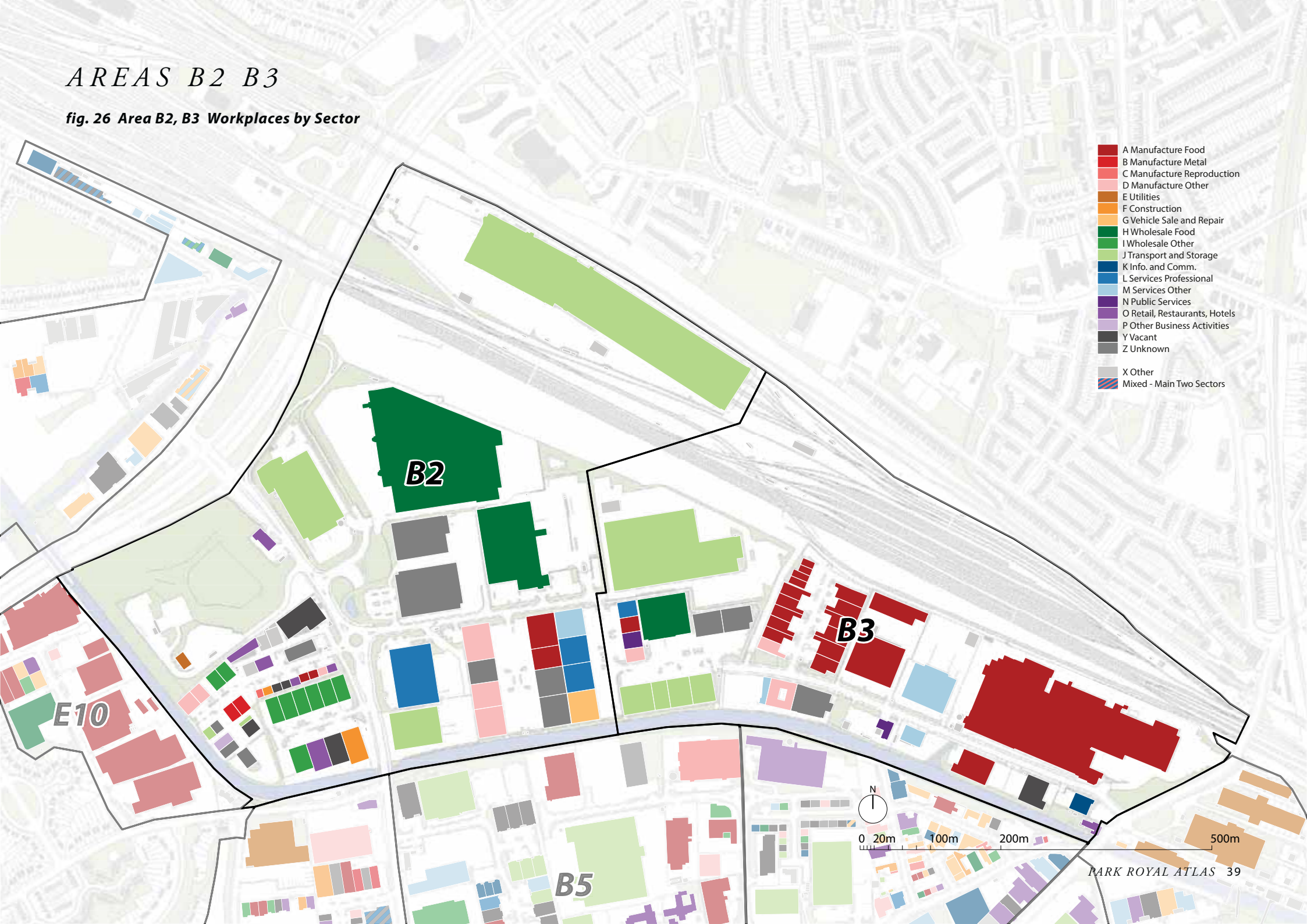


fig. 25 Gross Floor Area by Survey Area



AREAS B2 B3

fig. 26 Area B2, B3 Workplaces by Sector



AREAS B2 B3




C
E
F
5










Trading Post
Prop house





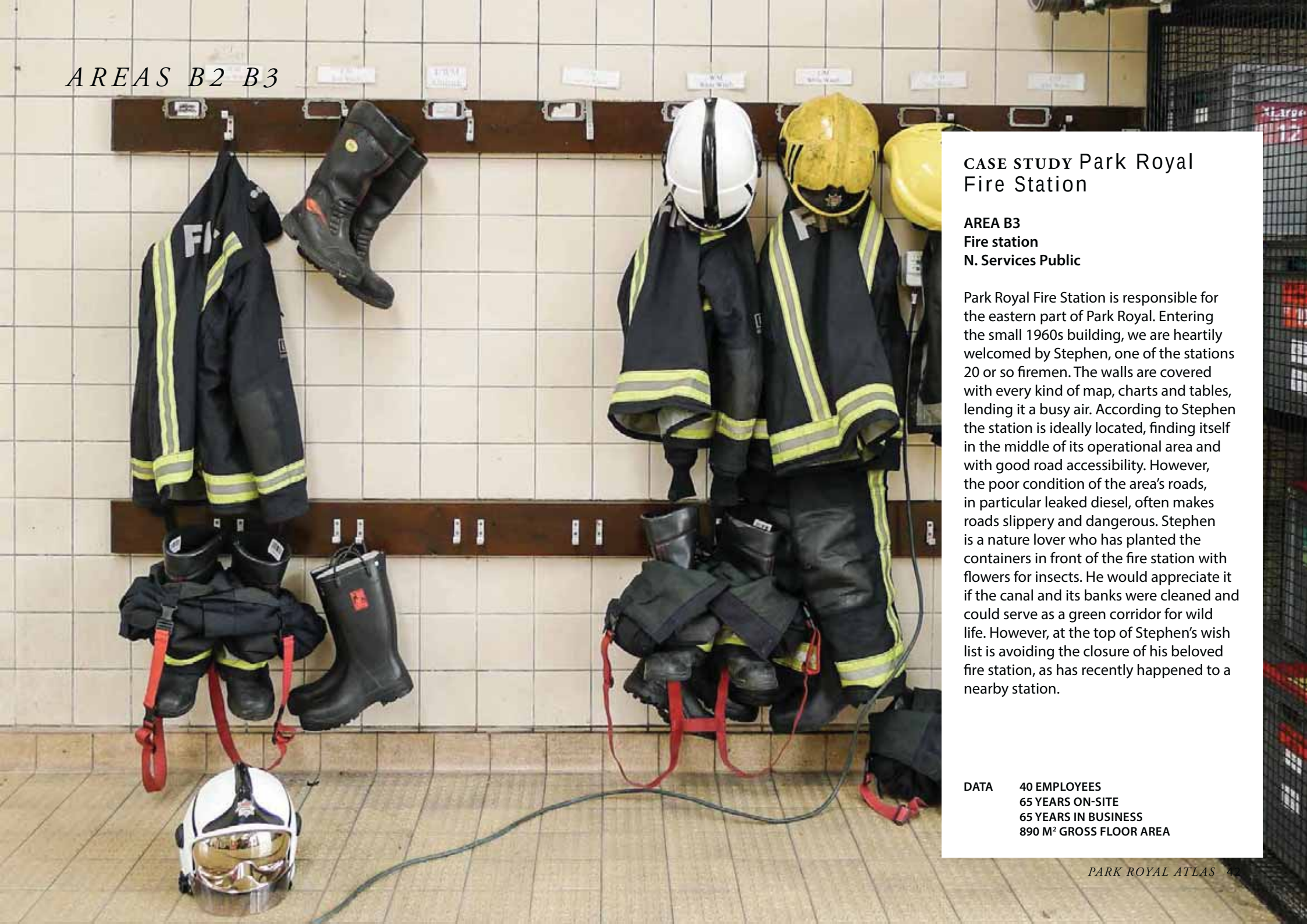

CROWN
DECORATING CENTRE
EVERYONE WELCOME
OPEN

CASE STUDY McVitie's

AREA B3
Biscuit manufacturer
A. Manufacture Food

McVitie's may be a British institution but it is also one of the oldest companies in Park Royal. Founded in 1830 in Edinburgh, it has been at its current location in Harlesden since 1902. Particularly known for their digestive biscuits, McVitie's first brought these confectionary icons to the market in 1892. McVities's biscuits have been taken as provision on expeditions, most prominently Amundsen's exploration of the South Pole, and acquired national significance during the First World War, becoming part of the "iron ration". However, McVitie's have always had operations beyond the humble digestive. Since the late 1800s they have regularly supplied Royal weddings and christenings, the most recent example being Prince William's groom cake for the Royal Wedding in 2011. With 735 employees, of which 60% live locally, McVitie's is one of the largest employers in Park Royal. The company thrives on the area's good road connections and transport links for staff.

DATA
735 EMPLOYEES
112 YEARS ON-SITE
184 YEARS IN BUSINESS
18,000 M² GROSS FLOOR AREA



CASE STUDY Park Royal Fire Station

AREA B3
Fire station
N. Services Public

Park Royal Fire Station is responsible for the eastern part of Park Royal. Entering the small 1960s building, we are heartily welcomed by Stephen, one of the stations 20 or so firemen. The walls are covered with every kind of map, charts and tables, lending it a busy air. According to Stephen the station is ideally located, finding itself in the middle of its operational area and with good road accessibility. However, the poor condition of the area's roads, in particular leaked diesel, often makes roads slippery and dangerous. Stephen is a nature lover who has planted the containers in front of the fire station with flowers for insects. He would appreciate it if the canal and its banks were cleaned and could serve as a green corridor for wild life. However, at the top of Stephen's wish list is avoiding the closure of his beloved fire station, as has recently happened to a nearby station.

DATA
40 EMPLOYEES
65 YEARS ON-SITE
65 YEARS IN BUSINESS
890 M² GROSS FLOOR AREA

AREAS B4 B5 B6



AREA B4 has a number of large modern warehouses located in business estates. The empty expanse to the west, currently in the process of being redeveloped into warehouses, used to be the location of the Guinness brewery, designed by Sir Giles Gilbert Scott in 1933. 25% of all businesses in the area are wholesalers. Just outside the western edge of the Park Royal Atlas boundary sits the world headquarters of the British multinational alcoholic beverages company Diageo.

Similarly dominated by business parks and large industrial warehouses, *AREA B5* is also the location of the Park Royal centre for Mental Health, part of the Central Middlesex Hospital. The area has the highest percentage of transport and storage workplaces in Park Royal (22%). Up until the 1980s Park Royal Vehicles Ltd was based here, and had built Halifax bombers and Routemaster buses from large warehouses adjoining Abbey Road.

AREA B6 includes the area between the Grand Union Canal and the Central Middlesex Hospital, one of Park Royal's largest employers. The western side is made up of some large industrial units and housing, while the eastern edge comprises a cluster of small, heterogeneous industrial buildings, many of them workshop units. The area was first developed as terraces in the 1870s. A carriage repair business that started during this period is still at its original location next to the canal, along with a cluster of vehicle repair businesses that have grown up around it. The area is characterised by these types of small independent businesses including trimmers, trailors, metal engineers and joiners, which in many cases have been handed down from generation to generation.



fig. 27 Number of Workplaces by Survey Area

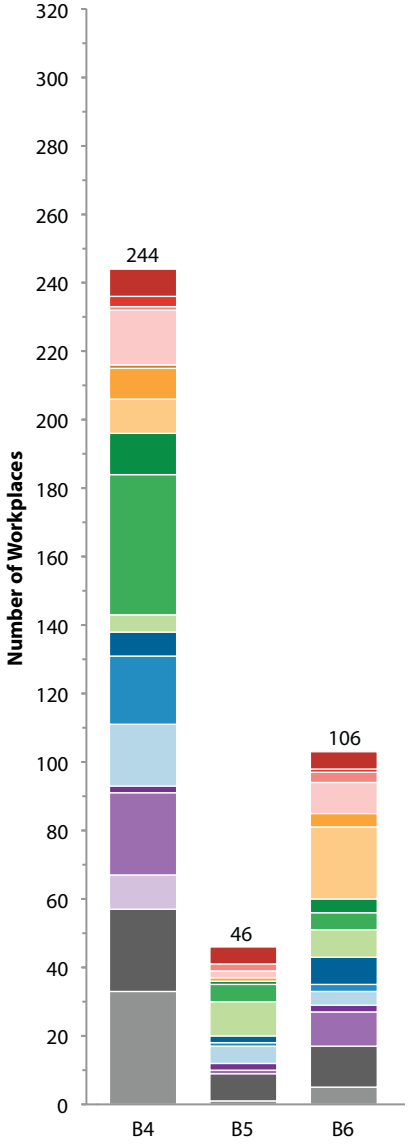
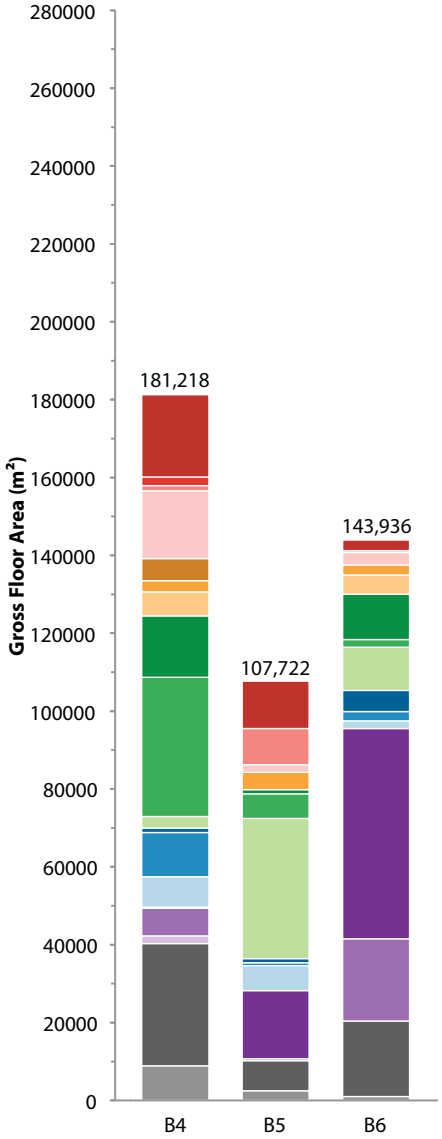
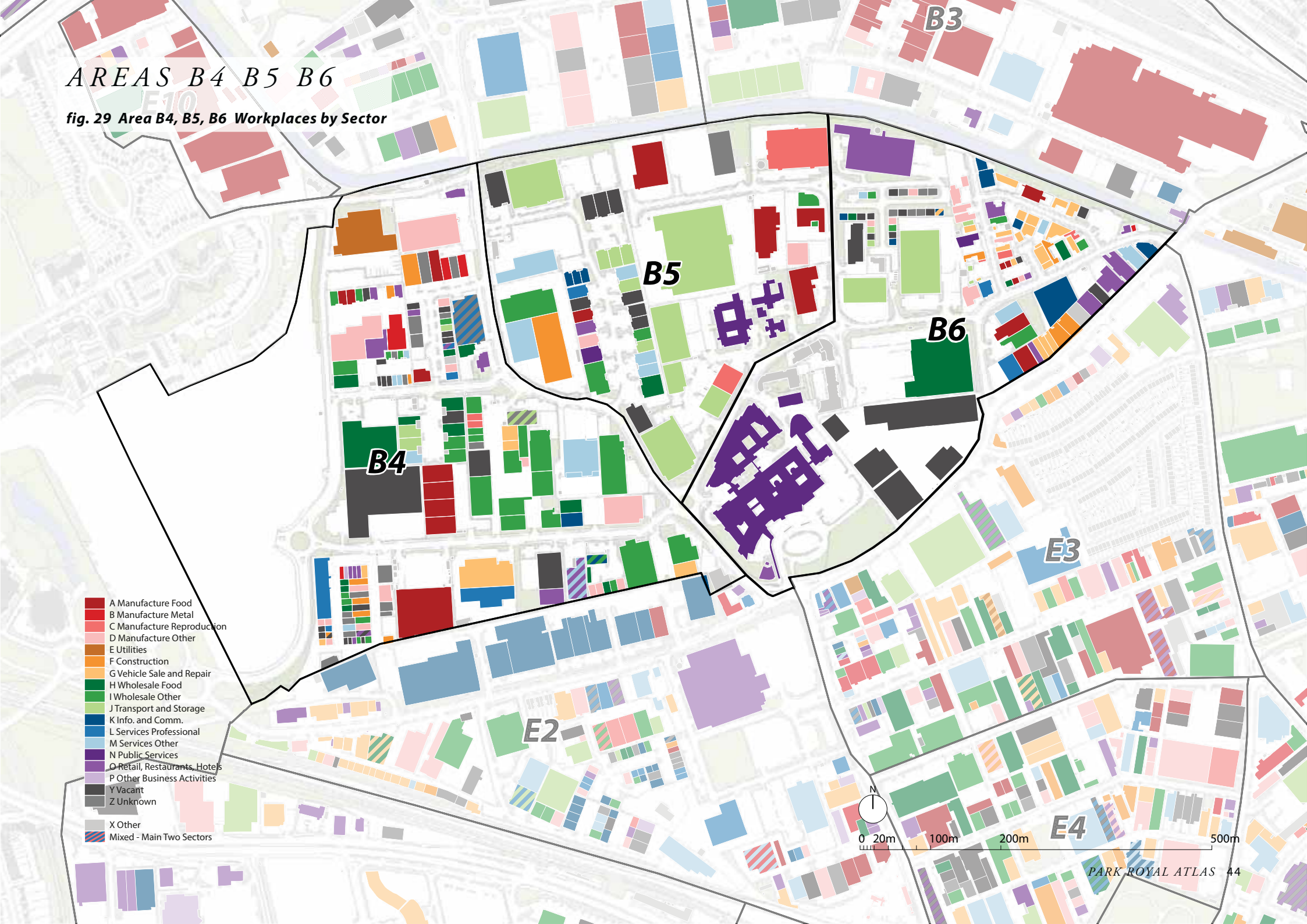


fig. 28 Gross Floor Area by Survey Area



AREAS B4 B5 B6

fig. 29 Area B4, B5, B6 Workplaces by Sector



AREAS B4 B5 B6





















CASE STUDY RDW Scenery

AREA B4
Scenery construction
D. Manufacture Other

Turning into the Genesis Business Park one is confronted by the miscellany of the everyday past. A forest of old bus stops and traffic signs stands next to stacked ammunition crates (empty one hopes). Just behind them, a Ukranian phonebox sits contentedly next to its more familiar London counterpart. RDW Scenery has over 28 years of experience producing high quality set construction. They employ carpenters, polystyrene sculptors, mobile screen artists, and metal welders; facilities include a metal shop, paint shop, and CNC router/cutter. With sister company Stockyard, a specialist prop hire firm, RDW have produced sets for a number of films and television programmes. However, they have also done more unusual work, including producing a series of elaborate sets for "The Azura", a 115,055 tonne cruise ship. The proximity of some of London's largest film studios (Shepperton, Twickenham, Pinewood) and television industries is a clear advantage of their Park Royal location. However, traffic congestion and poor road maintenance have become a growing problem.

DATA **10 YEARS ON-SITE**
35 YEARS IN THE BUSINESS
9,700 M² GROSS FLOOR AREA

CASE STUDY Botanic Lab

AREA B2
Organic juice manufacturer
D. Manufacture Other

Botanic Lab might very well be Park Royal's latest start-up. Established February 2014, it is located in a kitchen workspace on Acton Lane managed by Dephna Group. Former chef Christophe and partner Rebekah are the owners and happy to show us around. Their neon lit 50sqm stainless steel kitchen space is filled with boxes of small bottles. Today they begin production of a deluxe raw organic juice for the exclusive Fenwick department store on New Bond Street. Botanic Lab takes a scientific approach to health drinks, using a special juicing method to keep all the nutrients intact. Unusual ingredients like schisandra, turmeric and matcha are added to round off a range of organic and invigorating drinks, meant to help boost wellbeing and vitality. Drinking 'Tonic 1' is "like having an espresso but without the crash", Christoph says. The company has recently relocated from East London to Park Royal, mainly because of the good access and cost-effective shared kitchen space, hard to come by as it needs to comply with stringent health regulations.

DATA **2 EMPLOYEES**
IN BUSINESS AND ON SITE SINCE 2014

AREAS E1 E2



Forming the southern tip of Park Royal, *AREA E1* contains a large number of workplaces oriented towards the passing roar of the Western Avenue. Following the curve of the A40 are a number of large retailers, including the Park Royal Leisure Centre, as well as several large modern office spaces. To the east, wedged between the Central Line and larger retail units, are a number of small industrial parks with warehouse units of varying sizes. The area contains a large number of film-related businesses, including Black Island Studios, equipment rental companies and a specialist film processing lab.

Located in a triangle between Coronation Road, Park Royal Road and the Central Line siding, *AREA E2* is dominated by several business parks. The junction of Park Royal Road and Abbey Road form Park Royal's centre, complete with ASDA supermarket and large parking lot. The northern edge is predominantly large warehouses, the largest of which are occupied by a data centre. Small, independent car repair businesses are clustered on the area's Western edge. Although the small workshops they occupy are in various states of disrepair, these garages provide an important local service and employment for local people.

fig. 30 Number of Workplaces by Survey Area

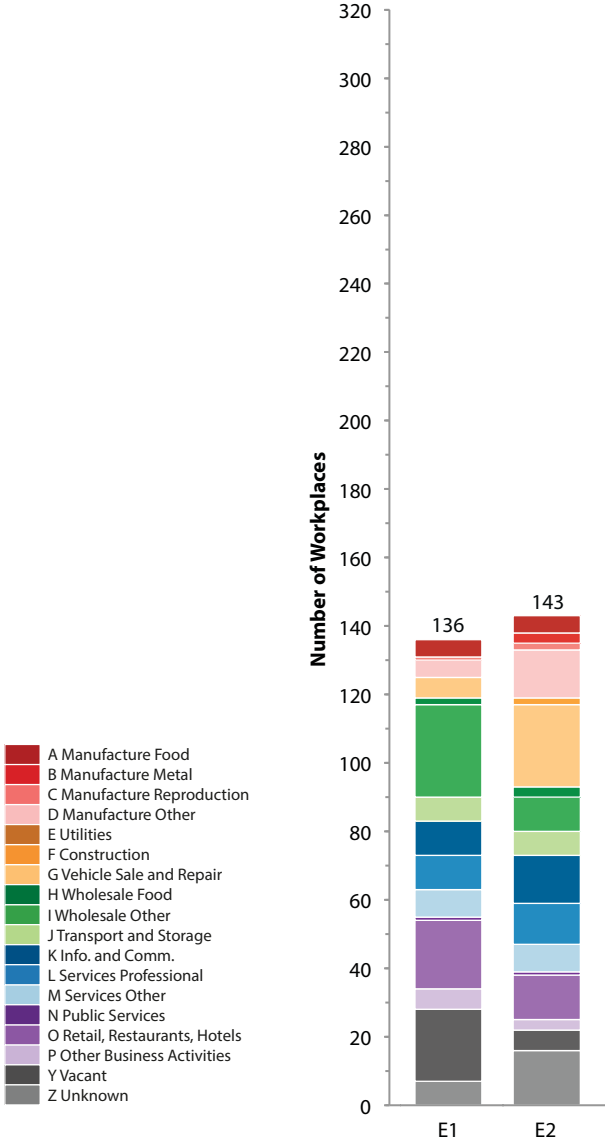
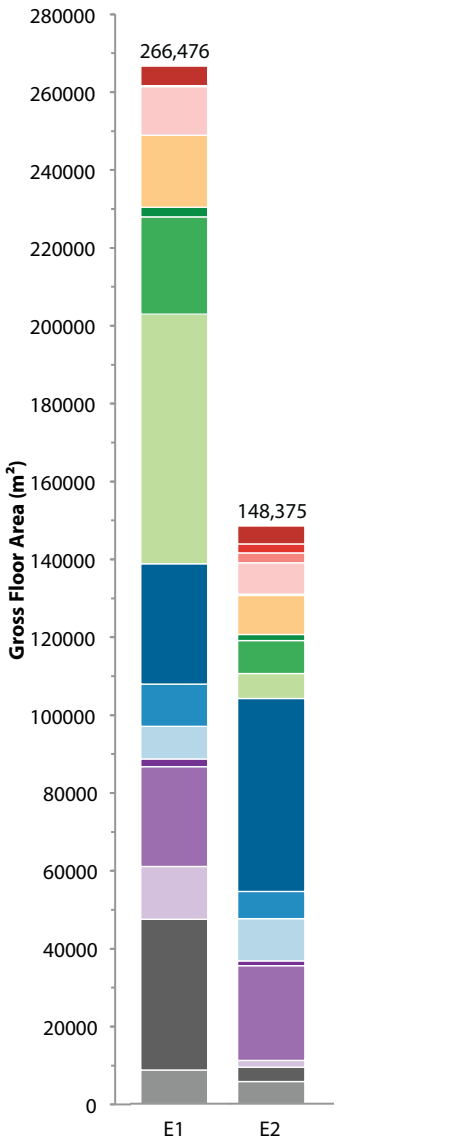
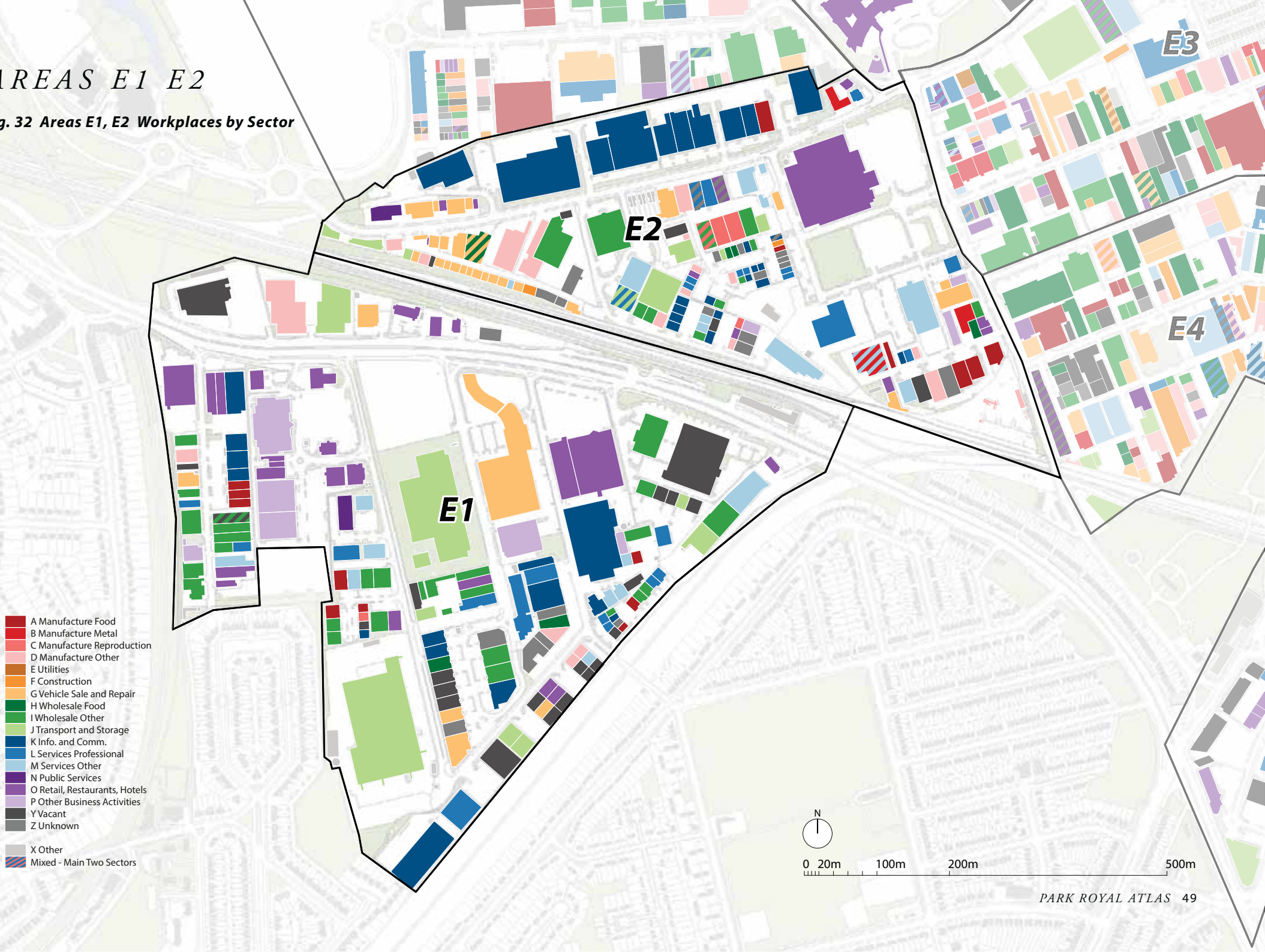


fig. 31 Gross Floor Area by Survey Area



AREAS E1 E2

fig. 32 Areas E1, E2 Workplaces by Sector



AREAS E1 E2































CASE STUDY Café Royal

AREA E2
Eatery
O. Retail Restaurant Hotel

Café Royal sits on Abbey Road, opposite Central Middlesex Hospital. With over 100 items on the menu and open seven days a week its six staff members are past masters at fast service, vital for the local workers on their half-hour lunch break. The café has a long history. Founded by the current owner's father in 1975, it had set up camp in Camden and Battersea before finally coming to Park Royal around 20 years ago. Further down Abbey Road is Abbey Point, a café and bed and breakfast run by the same owner. This establishment has a similar feel: affordable, convenient and industrious. The demand for accessible and affordable amenities by hospital patients and staff as well as the workers within Park Royal creates a high volume of trade for both establishments. These cafés, and others like them, are Park Royal's pit stops, connecting the area's many businesses and creating a genuinely sociable meeting space for nurses, mechanics, office workers and tired researchers alike.

DATA
6 EMPLOYEES
20 YEARS ON-SITE
24 YEARS IN THE BUSINESS
382 M² ESTIMATED FLOOR AREA
£800,000 ANNUAL TURNOVER



Image source: Panache Display Ltd.

CASE STUDY Panache Display Ltd

AREA E1
Shop window mannequin designers
L. Services Professional

You enter an old brick warehouse. On a table, a bodiless human arm. Behind a screen a group of impeccably dressed men watch you intently. No, not the start of a David Lynch film, you have simply wandered into the showroom and design studio of expert mannequin designers Panache Display Ltd. With their in-house sculptor the company has designed a range of stylistically distinct mannequins, ranging from anatomic realism to more artistic abstraction. Panache prototype mannequins in their Park Royal workshop, before sending off casts for oversees manufacture. The company has provided mannequins for a number of retail giants, including John Lewis, House of Fraser and Topshop. Park Royal has proved to be a suitable location with easy public transport links to central London clients, as well as easy access to Heathrow for overseas delivery. However, the company is surrounded by poor quality public realm, a problem exacerbated by the incessant noise of the passing A40.

DATA
10 EMPLOYEES
4 YEARS ON SITE
25 YEARS IN BUSINESS
315 M² GROSS FLOOR AREA

AREAS E3 E4



AREAS E3 and *E4* form what feels like the heart of Park Royal. Their dense, fine grained physical fabric are primarily made up of small brick warehouses from the early to mid 20th century. Many buildings are shared by several workplaces and have undergone numerous transformations and extensions. This often makes establishing workplace occupants and exact unit sizes difficult. The narrow roads struggle with the high volumes of delivery traffic and many are in need of maintenance. One business has responded by purchasing the road leading up to its premises, paying for regular maintenance out of its own pocket.

However, the area is also one of the most vibrant in Park Royal. The area hosts a number of Lebanese cafés and bakeries that have become important meeting places for the local community. The area is characterised by an ethnically diverse business population, with a predominance of small independent businesses selling or producing Middle Eastern food. This dense area seems able to accommodate every possible business sector, with workplaces ranging from hair extension manufacturers to industrial laundries and pastry manufacturers for some of London's top hotels.

fig. 33 Number of Workplaces by Survey Area

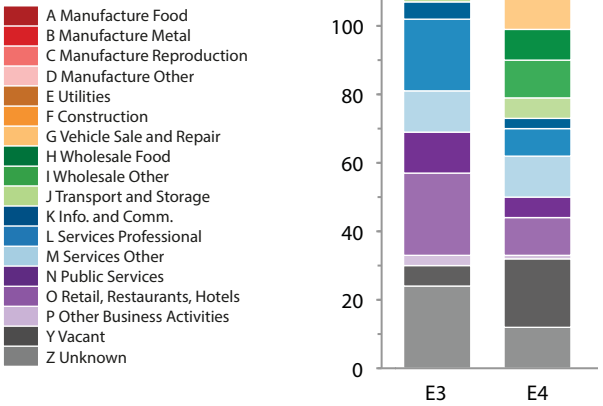
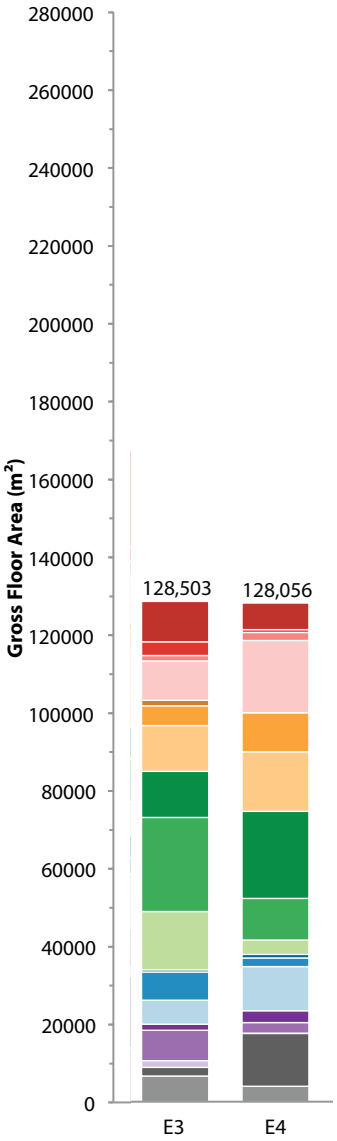
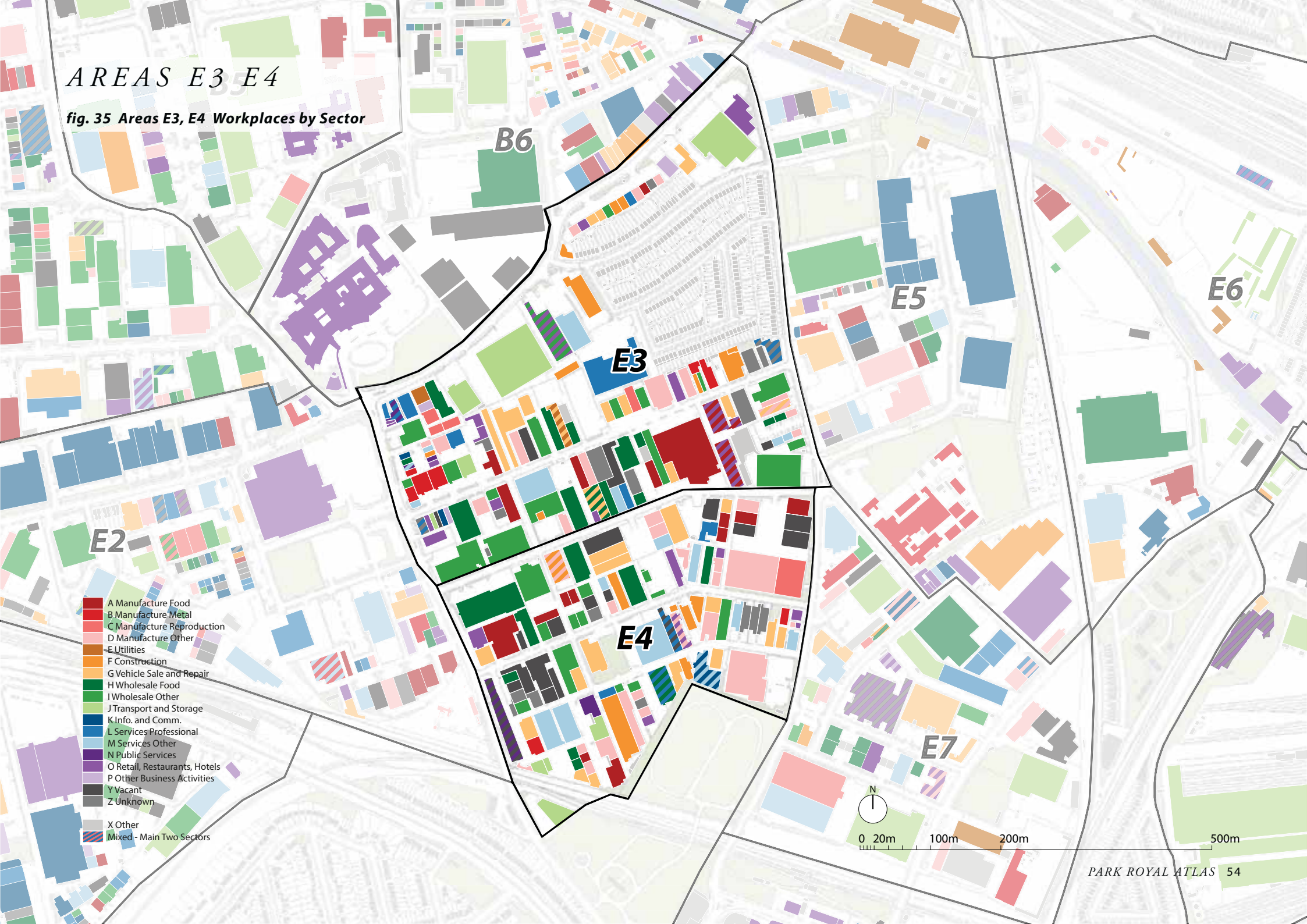


fig. 34 Gross Floor Area by Survey Area



AREAS E3 E4

fig. 35 Areas E3, E4 Workplaces by Sector



AREAS E3 E4











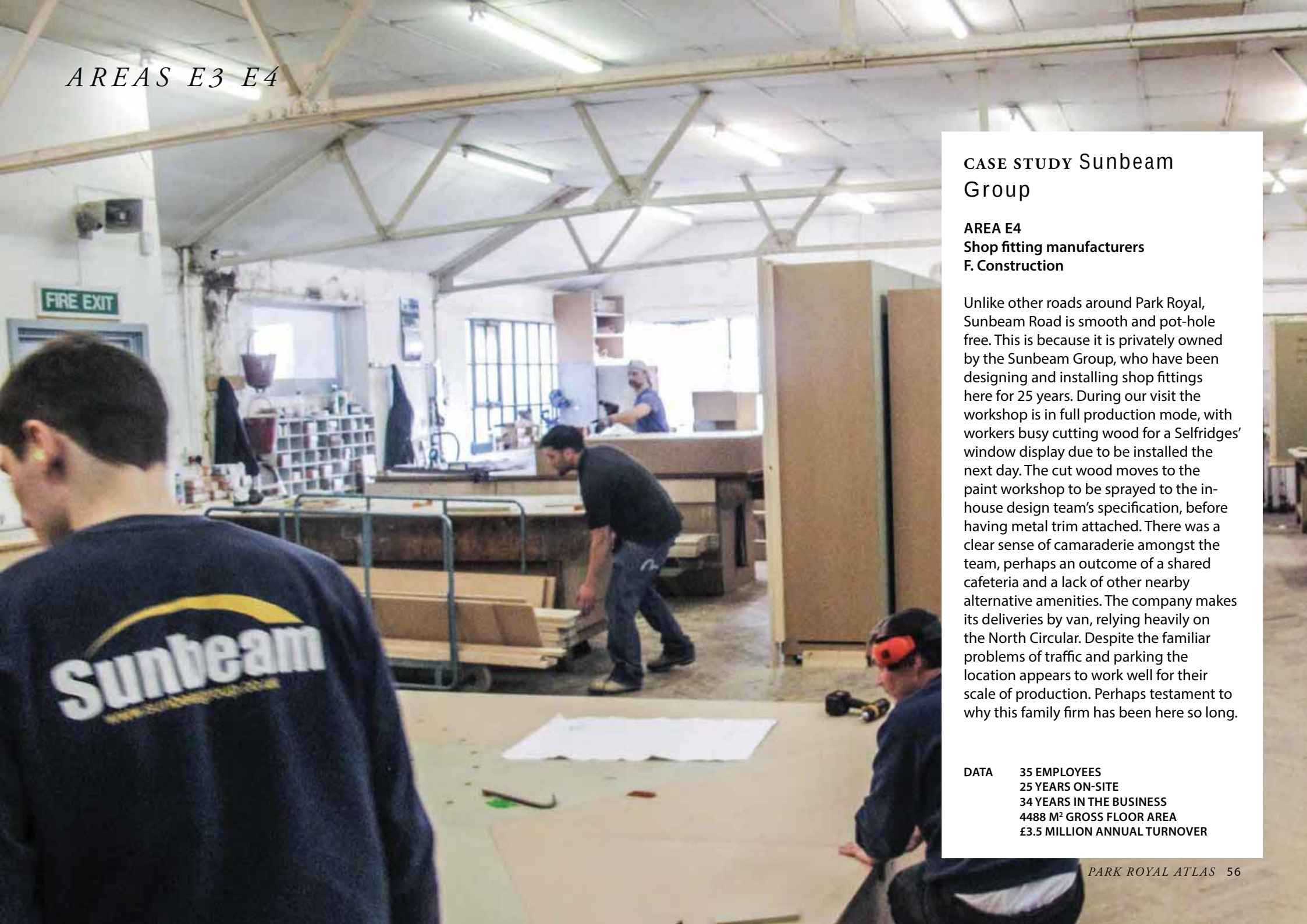












CASE STUDY Sunbeam Group

AREA E4
Shop fitting manufacturers
F. Construction

Unlike other roads around Park Royal, Sunbeam Road is smooth and pot-hole free. This is because it is privately owned by the Sunbeam Group, who have been designing and installing shop fittings here for 25 years. During our visit the workshop is in full production mode, with workers busy cutting wood for a Selfridges' window display due to be installed the next day. The cut wood moves to the paint workshop to be sprayed to the in-house design team's specification, before having metal trim attached. There was a clear sense of camaraderie amongst the team, perhaps an outcome of a shared cafeteria and a lack of other nearby alternative amenities. The company makes its deliveries by van, relying heavily on the North Circular. Despite the familiar problems of traffic and parking the location appears to work well for their scale of production. Perhaps testament to why this family firm has been here so long.

DATA
35 EMPLOYEES
25 YEARS ON-SITE
34 YEARS IN THE BUSINESS
4488 M^2 GROSS FLOOR AREA
£3.5 MILLION ANNUAL TURNOVER



CASE STUDY Altima Lighting

AREA E3
Architectural LED lights manufacturer
D. Manufacture Other

Behind an unassuming warehouse facade, Altima Lighting design and manufacture a range of lighting and lighting control systems. For David Clarke (managing director) the success of a building often hinges on small details. Altima has a solution to the awkward bathroom pull cord; an elegant push switch, indistinguishable from any other domestic switch, but carefully engineered to comply with strict building regulations. From the chrome and bright whites of the showroom, David introduces us to the functional clutter of the workshop. The work desks are a jumble of parts, tools, and lights at various stages of completion. Putting them together is clearly a fiddly job, and considerable skill and craftsmanship go into their production. For David, this almost artisanal production is a source of great pride. Although he has reservations about the suitability of his current location, in particular the lack of a showroom visible from the street, the company will continue to operate from Park Royal in the foreseeable future.

DATA
15 EMPLOYEES
20 YEARS ON-SITE
34 YEARS IN THE BUSINESS
1667 M² GROSS FLOOR AREA

AREAS E5 E6



AREA E5, east of North Acton Road, is characterised by a relatively low number of workplaces that nevertheless occupy a comparitively large gross floor area. At the area's northern end is a National Grid substation which was originally a sizeable power plant producing electricity for large parts of London. The area has a mix of older and newer warehouse buildings of various sizes and is home to a fine metal refinery, one of the first manufacturers to locate in Park Royal over 100 years ago.

Located in the north eastern outskirts of Ealing, *AREA E6* consists mainly of large parking lots and industrial yards with warehouses. On the southern edge sits a small cluster of buildings, including a large historic two-storey brick building housing an impressive prop hire collection. North of the canal is characterised by large rail infrastructure, including the large cranes of the Freightliner Terminal, and a National Grid site. The remaining area consists mainly of large yards with temporary container buildings. Most businesses are in the storage or construction sectors, with a significant number of film-related businesses.

fig. 36 Number of Workplaces by Survey Area

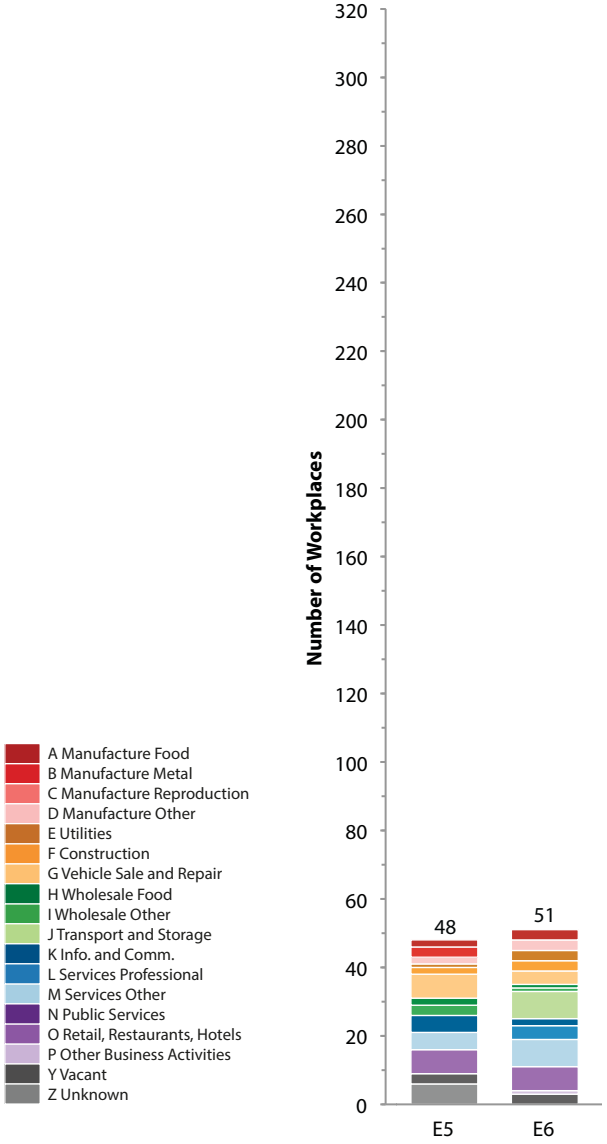
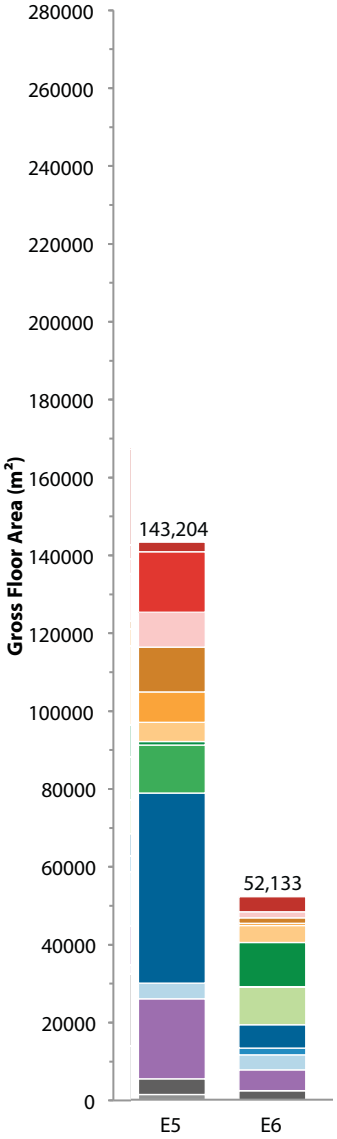
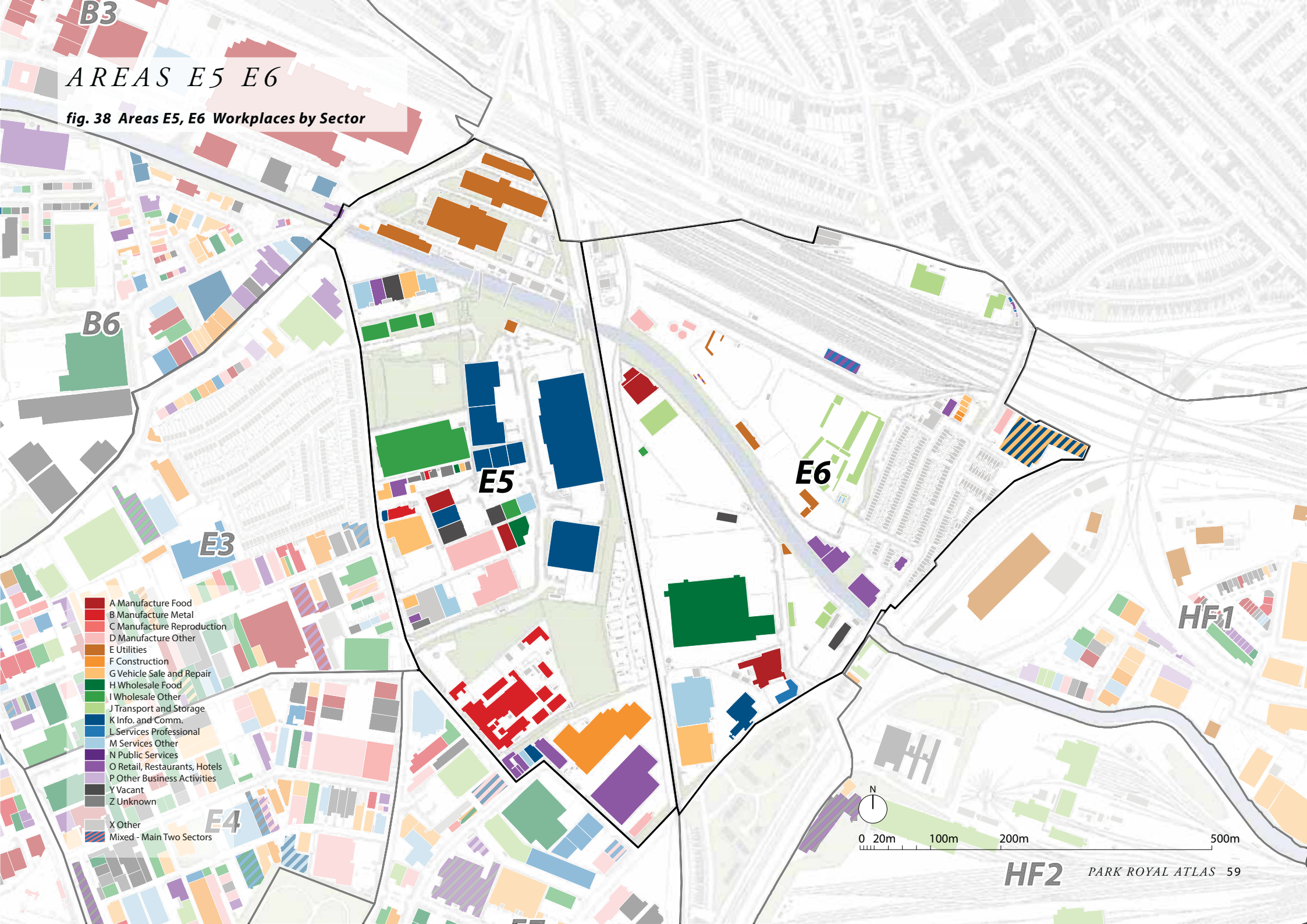


fig. 37 Gross Floor Area by Survey Area



AREAS E5 E6

fig. 38 Areas E5, E6 Workplaces by Sector



AREAS E5 E6























AREA E5.02

CASE STUDY ARY Network

AREA E5
Ethnic TV broadcaster
K. Information and Communication

The business started in the building 12 years ago, renting out space that had previously been used by another TV broadcaster. It is located on the two upper floors of a 3-storey corner office building from the 50s, which asserts its presence on North Acton Road but is in need of maintenance. According to Shahzad, the station's manager, the business employs around 13 people who are all from the local boroughs. They broadcast Pakistani TV and news through the SKY and Virgin networks to 7000 subscribers across the UK. The business came to Park Royal because of the existing broadcasting business cluster and accessibility to public transport links. The manager plans to continue the business in its current form and location. However, he says that newer communication infrastructure and a reduction in traffic would benefit businesses like his.

DATA **13 EMPLOYEES**
12 YEARS IN BUSINESS
12 YEARS ON SITE

CASE STUDY Flash Film Studios

AREA E6
L. Services Professional

Flash Film Studios occupies the largest part of a futuristic metal clad building next to the Willesden Freight Terminal. The film and photo studio has been operating just over a year and is part of the Flash Film Group which includes a lighting company, furniture hire and set construction company. The studio can therefore deliver a complete set of services linked to the film industry. Despite their small size of only three employees, the Studios complete about 12 film and photo productions per month, ranging from fashion shoots to short films, TV commercials and music videos. The studio is optimistic about their future, expecting to hire more staff and to slightly increase their floor space. The business benefits the proximity of other film-related businesses in Park Royal. However, they are critical of the poor access to their building as well as poor public transport links in their area. They would also welcome an increased offer of local shops and eateries.

DATA **3 EMPLOYEES**
1 YEAR IN BUSINESS AND ON SITE
500 M² GROSS FLOOR SPACE

AREAS E7 E8 E9



AREA E7, next to North Acton tube station, has one of the densest collection of workplaces in Park Royal. Two business centres accommodate a large number of micro-businesses, many of them in the food manufacturing and wholesale sectors. Production ranges from Baklava and roasted nuts, to raw detox food delivered to your home or place of work. The garage of a luxury car dealership leads to frequent sightings of Rolls Royce and Lamborghinis. Although less aesthetically appealing, an industrial solder manufacturer with a business history of 150 years, and a waste management company also play important roles in the area.

AREA E8, the site of the former BBC costume store south of the North Acton tube station, is currently being redeveloped with student accommodation and some retail. The area is often blighted by heavy traffic due to its advantageous links to the A40. At its heart are the UK headquarters of Carphone Warehouse, Park Royal's largest employer. The headquarters are surrounded by a number of business parks with large new warehouses, many of which are still empty. A former perfume factory, rents out workspace and accommodates a number of artist studios. It is also the former workplace of a young Elvis Costello, imortalised as the "vanity factory" in his 1977 song "I'm Not Angry".

AREA E9 is cut off from the rest of Park Royal by railway lines and has limited road and pedestrian access. The area features a number of attractive industrial brick buildings from the 1920s and 30s, mainly workshops and small warehouses with offices, as well as some more recent anonymous office and large warehouse units. The area has the second highest percentage of food manufacturers (14%) but also the highest proportion of vacant business units in Park Royal (41%).



fig. 39 Number of Workplaces by Survey Area

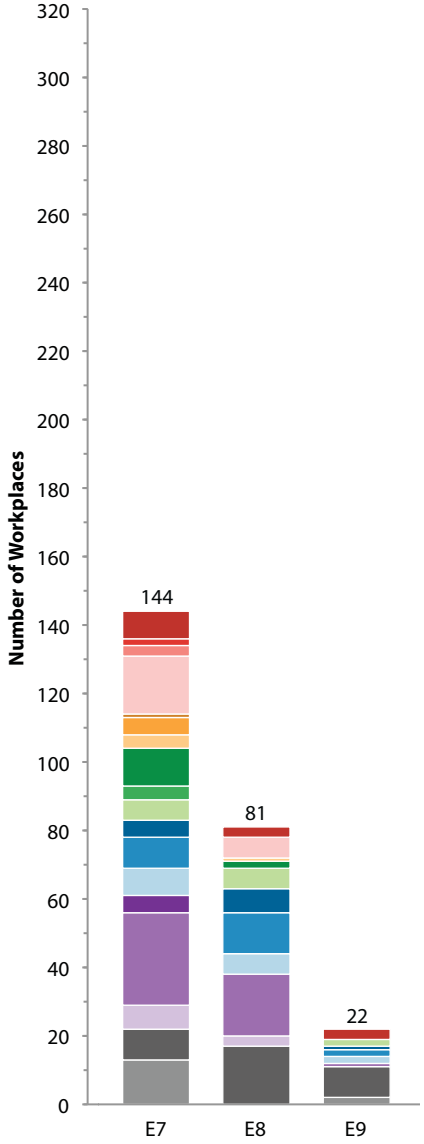
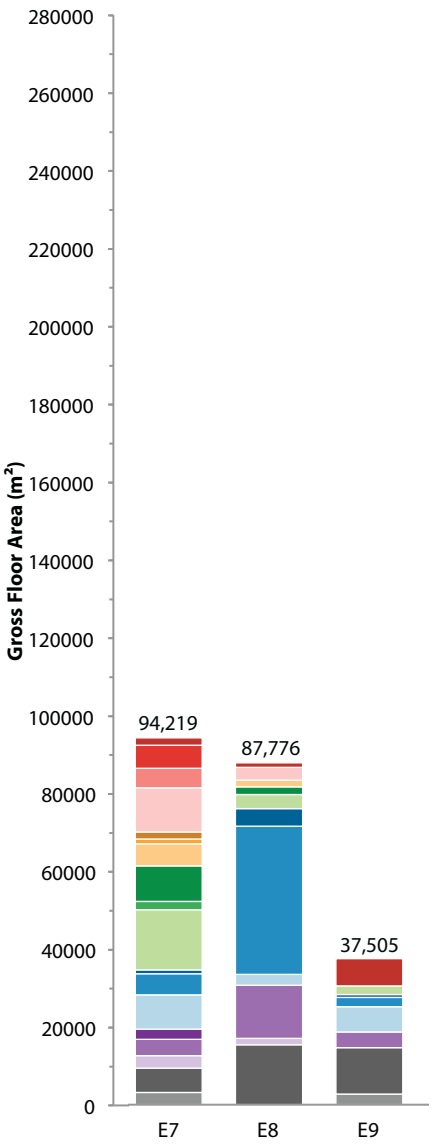
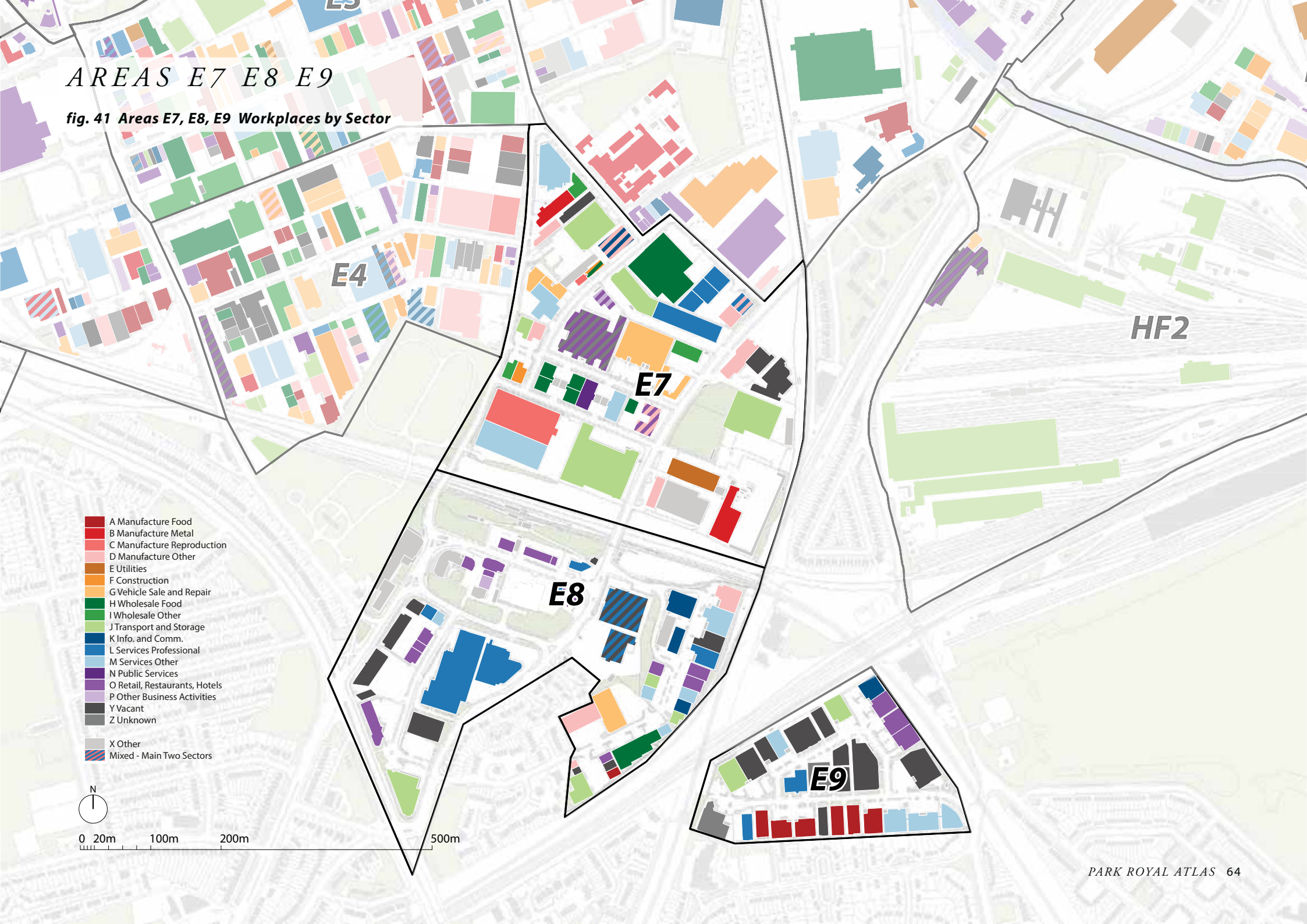


fig. 40 Gross Floor Area by Survey Area



AREAS E7 E8 E9

fig. 41 Areas E7, E8, E9 Workplaces by Sector



AREAS E7 E8 E9











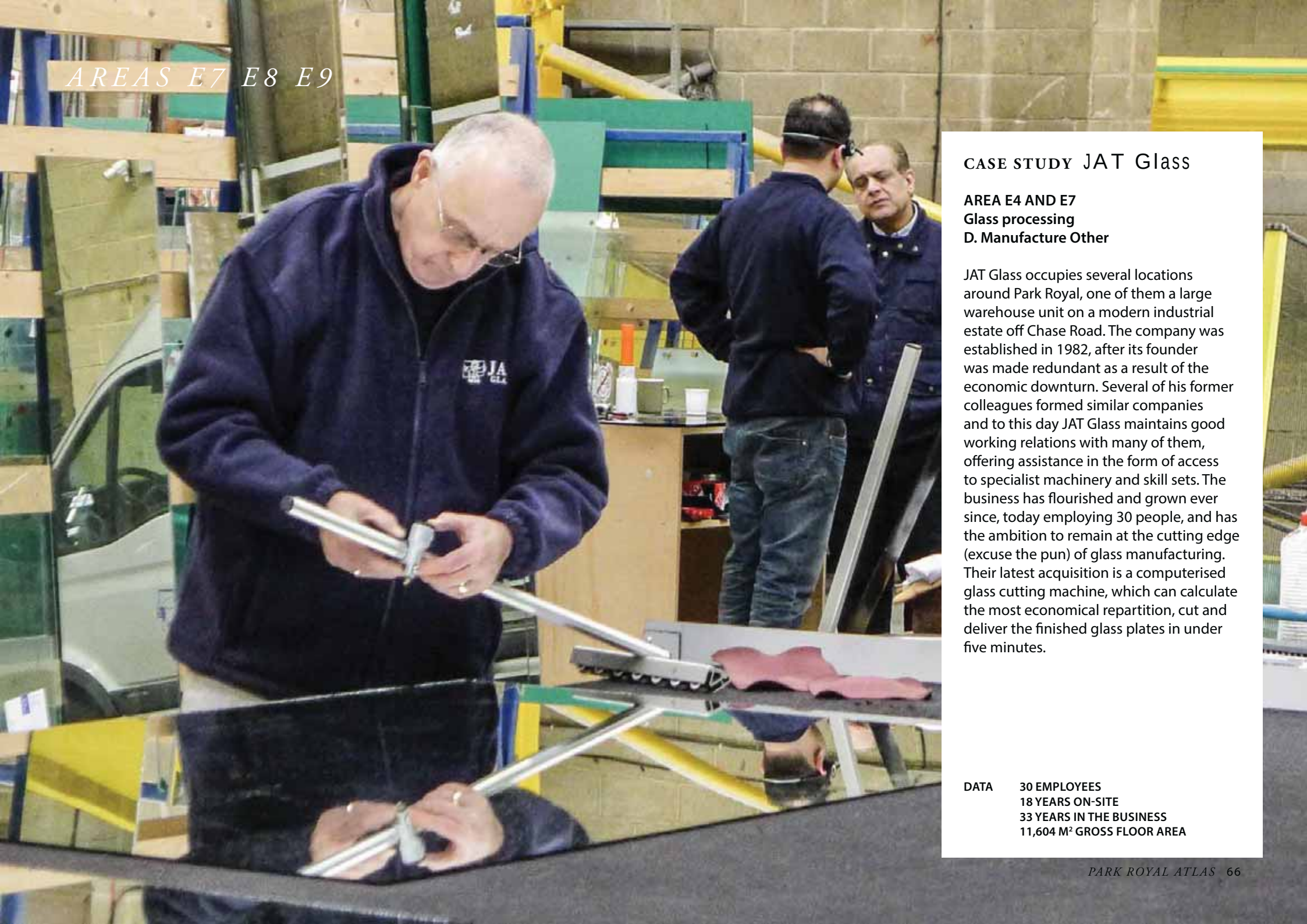












CASE STUDY JAT Glass

AREA E4 AND E7
Glass processing
D. Manufacture Other

JAT Glass occupies several locations around Park Royal, one of them a large warehouse unit on a modern industrial estate off Chase Road. The company was established in 1982, after its founder was made redundant as a result of the economic downturn. Several of his former colleagues formed similar companies and to this day JAT Glass maintains good working relations with many of them, offering assistance in the form of access to specialist machinery and skill sets. The business has flourished and grown ever since, today employing 30 people, and has the ambition to remain at the cutting edge (excuse the pun) of glass manufacturing. Their latest acquisition is a computerised glass cutting machine, which can calculate the most economical repartition, cut and deliver the finished glass plates in under five minutes.

DATA
30 EMPLOYEES
18 YEARS ON-SITE
33 YEARS IN THE BUSINESS
11,604 M² GROSS FLOOR AREA

CASE STUDY Sweetland Ltd

AREA E7

Baklava manufacturer / wholesaler
H. Wholesale Food

If Sweetland's premises, a small brick warehouse from the 1970s, seem slightly oversized and empty, it is simply because the company has recently increased their floor space in anticipation of a further business growth. Founded in 1997, the companies moved to Park Royal 10 years ago. Their offer includes a variety of Mediterranean pastries (produced on site), roasted nuts and bespoke cakes, available in their shop and online to private clients as well as bulk buyers. While their ingredients are primarily sourced from UK suppliers, their client base stretches as far as Europe. Sweetland currently employs 10 people, the majority of whom live locally. Given the burgeoning success of the business it is perhaps unsurprising that Mayur (Sweetland's manager) has nothing but praise for Park Royal, in particular the relatively affordable rents. He sees any upcoming redevelopments as an opportunity for new customers and expanding the business.

DATA

10 EMPLOYEES
10 YEARS ON SITE
17 YEAR IN BUSINESS
£1.4 MILLION ANNUAL TURNOVER
840 M² GROSS FLOOR AREA

CASE STUDY The Soundhouse Studio

AREA E8
Spoken word recording studio
K. Information and Communications

It is unlikely that you will see many autograph hunters hanging around the Victoria Industrial Estate car park. However, there are few venues in Park Royal that can claim to have played host to as many actors and celebrities as the Soundhouse. Emily Watson, Benedict Cumberbatch, David Tennant and James McAvoy have all recorded here. Originally based in East London, the studio was forced out by the threat of redevelopment. By adapting an empty warehouse, Soundhouse have managed to create a studio building that includes five recording studios, two mastering/editing suites, and a light and airy break room on the ground floor. The studios are primarily used for spoken word recordings, with a particular emphasis on audiobooks and radio. While the security and relative seclusion offered by the Victoria industrial estate has its advantages, the studio is largely invisibile from the street, meaning celebrity guests are often left circulating on Victoria Road.

DATA
10 EMPLOYEES
1 YEAR ON SITE
30 YEARS IN BUSINESS
1148 M² GROSS FLOOR AREA`

AREAS HF1 HF2



Bounded by railway lines to the north, east and west, as well as the Grand Union Canal to the south, *AREA HF1* is one of the most isolated areas in Park Royal. Access is limited to two road bridges at either end of Scrubs Lane (Mitre Bridge being the most attractive) as well as a particularly unwelcoming pedestrian bridge from the Willesden Junction overground and tube station to the north. Adjoining the northern railway lines are two large waste recycling facilities, south of which is a mix of large brick warehouses and offices, (primarily occupied by Car Giant) and modern industrial estates. The area is also home to a large number of artist studios, with six separate buildings playing host to close to a hundred artists and designer-makers.

AREA HF2 is dominated by a two large rail depots operated by Crossrail and Great Western. The resulting tangle of railway lines and gargantuan train sheds has made the area completely inaccessible to the general public. A lone business centre, complete with Jamaican restaurant, on the area's western border adds a little variety to an area otherwise dominated by large scale rail infrastructure.

fig. 42 Number of Workplaces by Survey Area

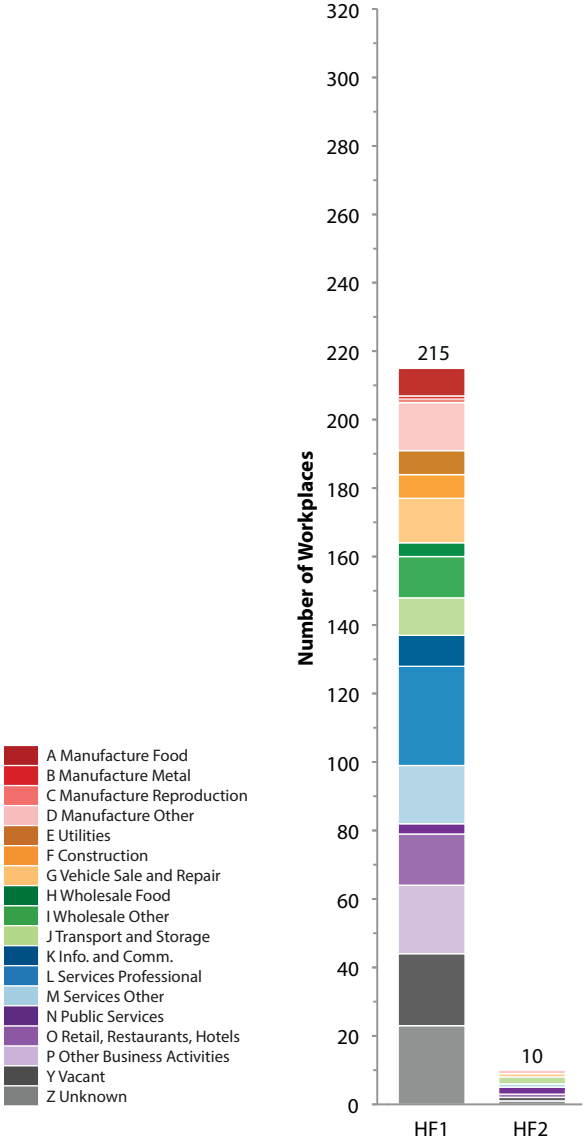
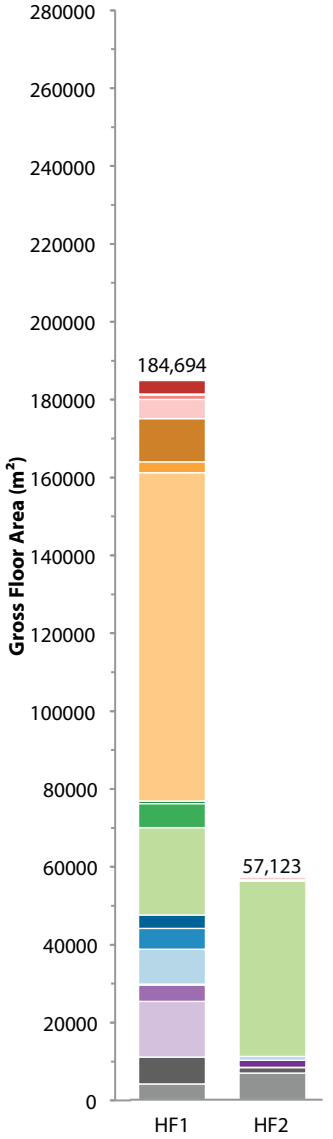
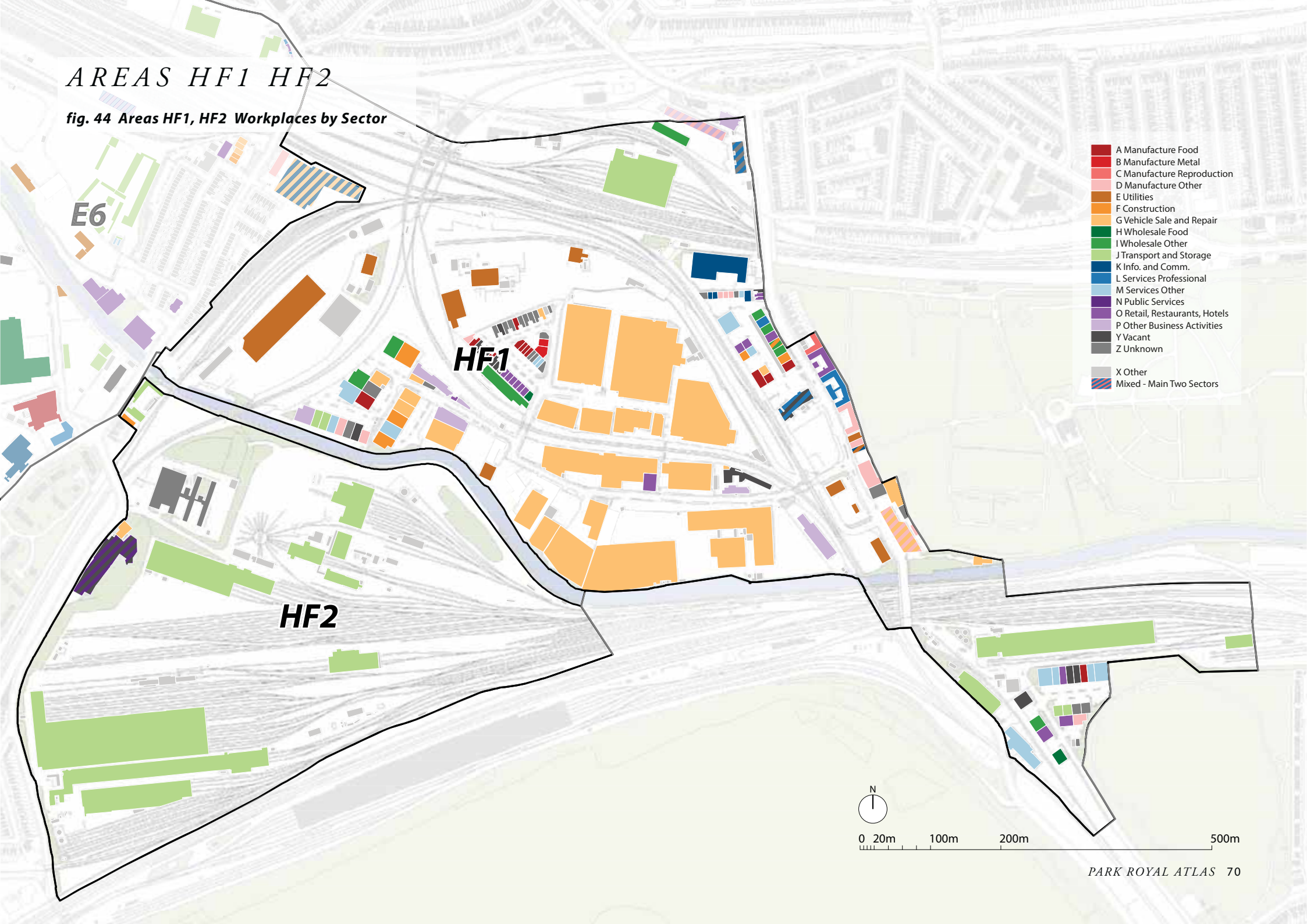


fig. 43 Gross Floor Area by Survey Area



AREAS HF1 HF2

fig. 44 Areas HF1, HF2 Workplaces by Sector



AREAS HF1 HF2























CASE STUDY NorthWest Studios

Managed artist studios
AREA HF1
P. Other

Marooned in the sprawling expanse of the Car Giant estate, NorthWest studios, the creation of German-born artist Markus Blattmann, operate 4 studio buildings. Little distinguishes this rag-tag collection of former office buildings from their surroundings. In contrast to the attention seeking murals and hipster baiting signage of their east London counterparts, NorthWest studios do little to draw attention to their presence. Markus explains that this is a product of the studio occupants, characterised by an older "more established" group of artists. One studio occupant has just completed a commission to produce a large red swivel chair, to be used in BBC ratings hit "The Voice". However, despite becoming London's 14th largest studio provider, Markus is pessimistic about the future. With the likely redevelopment of the Old Oak area Markus suspects it will prove difficult to secure equivalent studio space in any new development.

DATA **1 EMPLOYEE**
90 STUDIOS ACROSS FOUR BUILDINGS

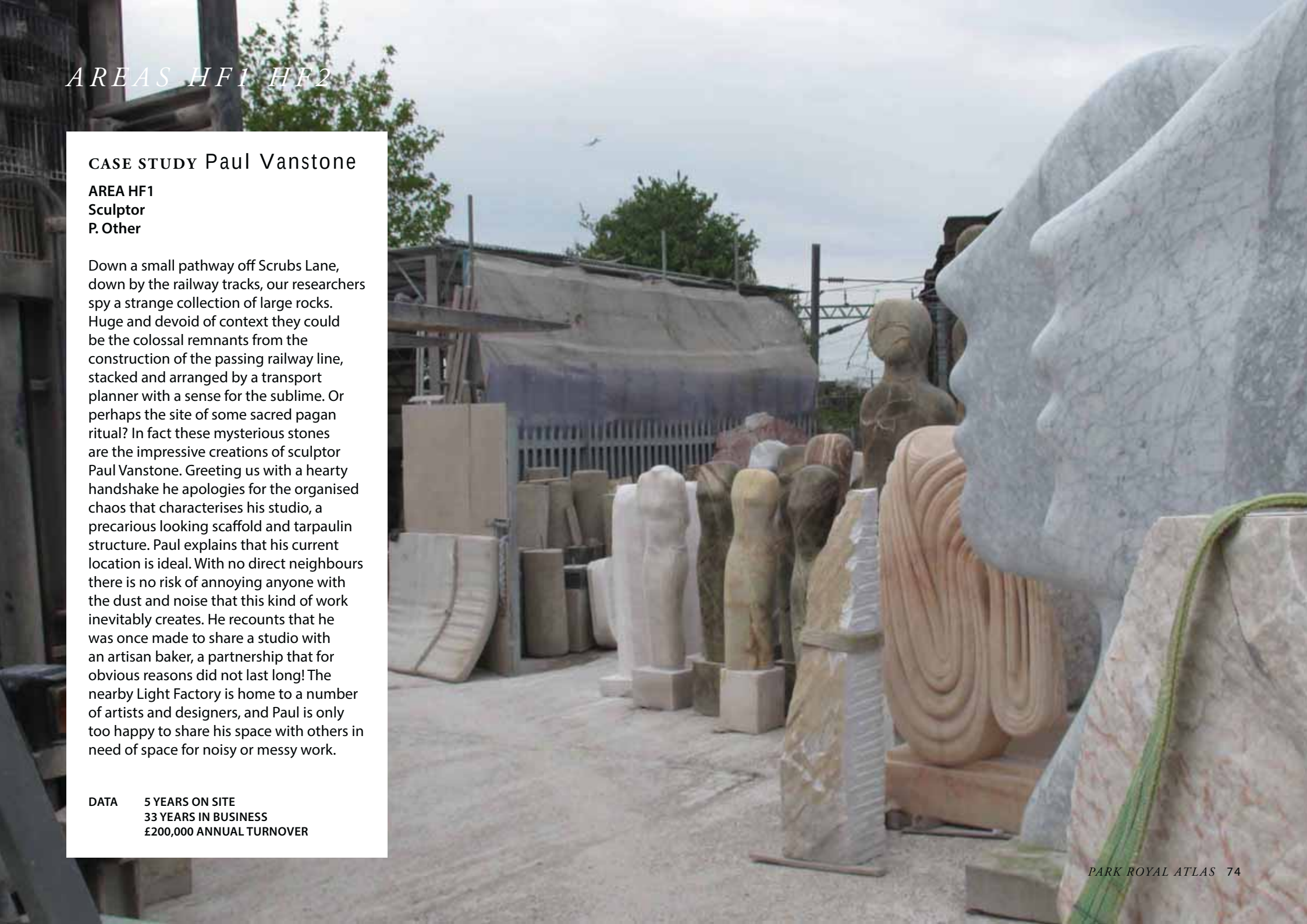


CASE STUDY Powerday

AREA HF1
Building waste recycling centre
E. Utilities

At first glance it appears that Powerday, a building waste management and recycling company, are occupying a particularly difficult site. Bordered by the Grand Union Canal and by railway lines, the site is accessible only through a gated private road and a narrow pedestrian bridge from Willesden Junction. But the company has made use of the surrounding infrastructure, transporting building waste via rail and even via barges on the canal. This produces significantly less C02 than transporting by lorry, as a single train carries the equivalent of 70 lorry loads of material. Once the waste has arrived a fully automated processing plant is able to sort through its content, extracting recyclable materials such as metals, wood, soil, plastics, aggregates and paper. Any residual waste is turned into either "solid recovered fuel" or "refuse derived fuel", which is then transported off-site to generate electricity. Despite having a capacity and desire for expansion there are concerns that the proposed redevelopment of the Old Oak area will eventually force them out of the area.

DATA
150 EMPLOYEES
14 YEARS ON SITE
PROCESSED 0.5M TONNES OF WASTE
395 M^2 GROSS FLOOR AREA



CASE STUDY Paul Vanstone

AREA HF1
Sculptor
P. Other

Down a small pathway off Scrubs Lane, down by the railway tracks, our researchers spy a strange collection of large rocks. Huge and devoid of context they could be the colossal remnants from the construction of the passing railway line, stacked and arranged by a transport planner with a sense for the sublime. Or perhaps the site of some sacred pagan ritual? In fact these mysterious stones are the impressive creations of sculptor Paul Vanstone. Greeting us with a hearty handshake he apologies for the organised chaos that characterises his studio, a precarious looking scaffold and tarpaulin structure. Paul explains that his current location is ideal. With no direct neighbours there is no risk of annoying anyone with the dust and noise that this kind of work inevitably creates. He recounts that he was once made to share a studio with an artisan baker, a partnership that for obvious reasons did not last long! The nearby Light Factory is home to a number of artists and designers, and Paul is only too happy to share his space with others in need of space for noisy or messy work.

DATA **5 YEARS ON SITE**
33 YEARS IN BUSINESS
£200,000 ANNUAL TURNOVER

INTERVIEW ANALYSIS



INTERVIEW ANALYSIS

EMPLOYEE NUMBERS

During the short interviews businesses were asked what the total number of employees located at their premises was, including the owner(s), as well as for an estimate of the proportion that live locally (within the boroughs of Brent, Ealing and Hammersmith & Fulham).

Workplaces with 250+ full time employees emerged as the largest employers of the workplaces interviewed, with 36% of the total. A few of these large workplaces are in the food manufacturing sector, making it the sector with the largest number of employees at 23%. Although large in number, micro workplaces only make up 6% of the total workforce.

Overall, 51% of the Park Royal employees in interviewed workplaces live locally. Micro businesses employ the largest proportion of local staff (63%) while large businesses employ the lowest proportion (41%). However, this is based on only 4 interviews with large businesses and in terms of employee numbers, large businesses employ more than 5 times as many local people as micro businesses.

fig. 45 Total Number of Employees by Workplace Size
Interviewed workplaces only (14%)

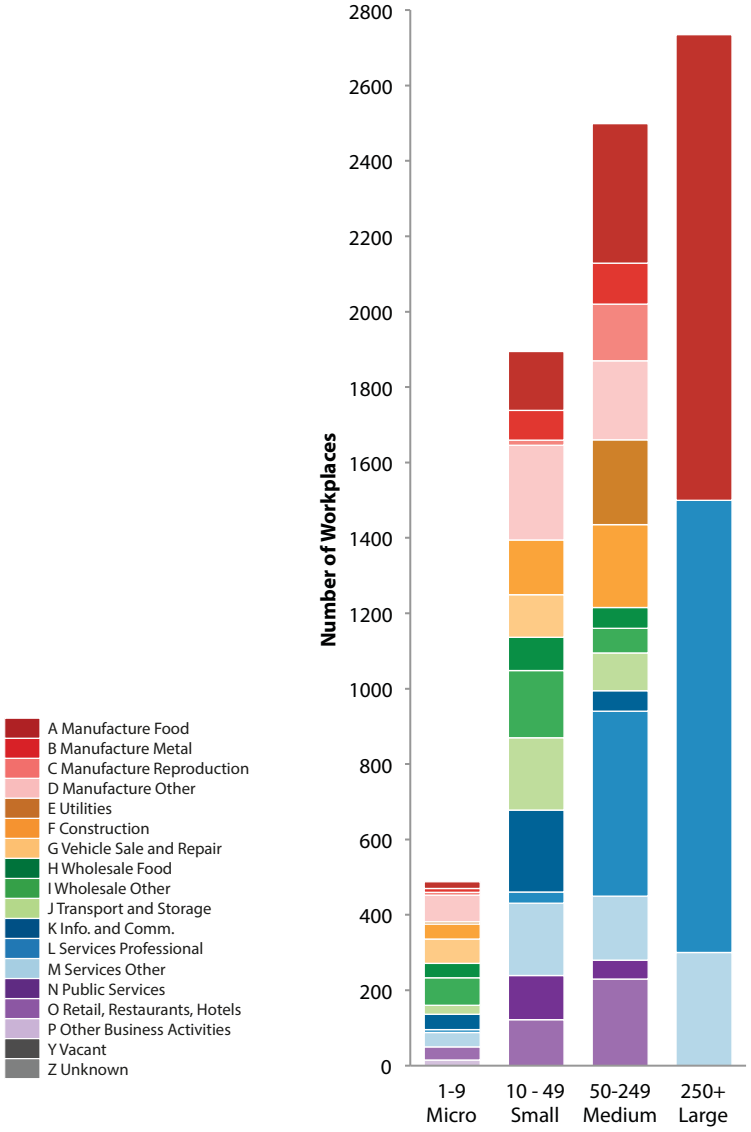
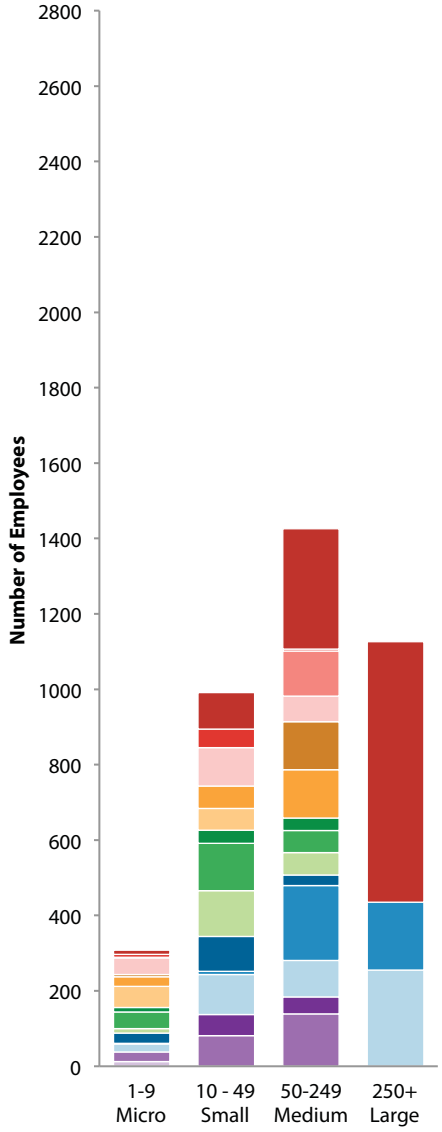


fig. 46 Number of Local Employees by Workplace Size
Interviewed workplaces only (14%)



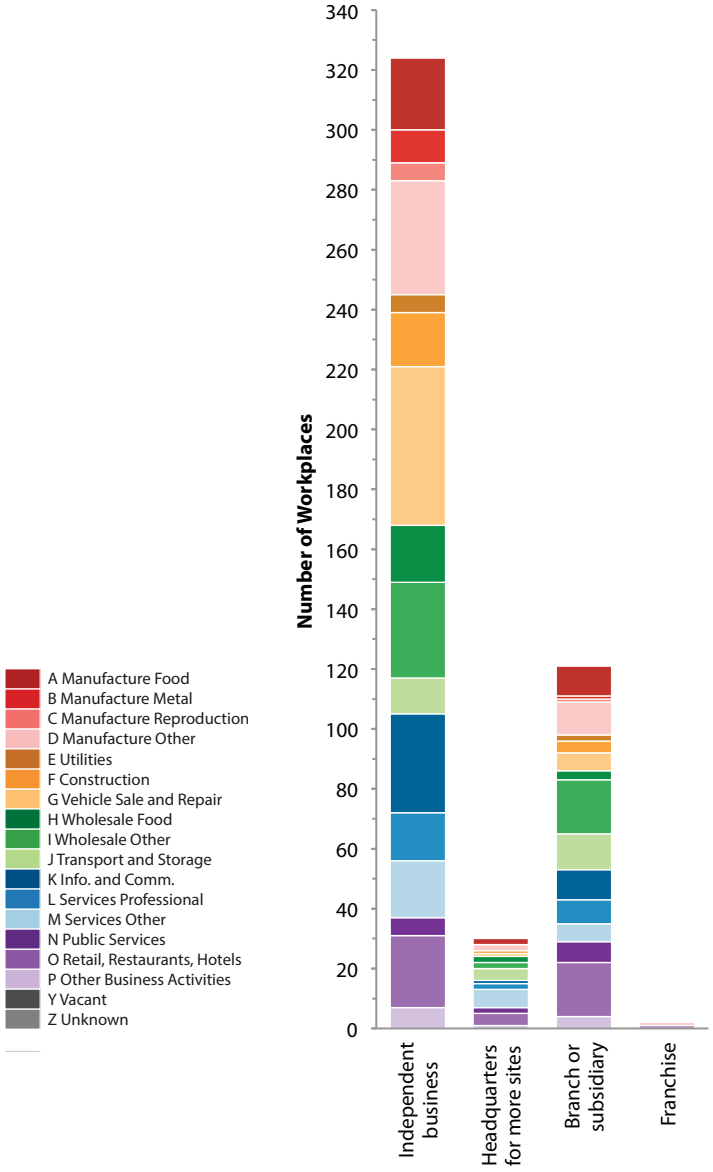
TYPES OF BUSINESSES

Park Royal is a hub for independent businesses, with 68% of workplaces interviewed listed as independent businesses. While there is a higher proportion of some business sectors, such as manufacturing other or vehicle sale and repair, all sectors are represented. This suggest that Park Royal offers favourable conditions for a wide range of small entrepreneurs.

There is also a wide range of headquarters in Park Royal. Although only 30 headquarters were interviewed , these spanned all sectors, with the exception of metal and reproduction manufacturing sectors and utilities. The largest headquarters is the UK headquarters of Carphone Warehouse, a mobile phone retailer.

Branches or subsidiaries make up 25% of the interviewed workplaces. Again there is a wide spread of all the businesses sectors with a concentration of retail, restaurants and hotels (15%) and other wholesale (15%). Only 4 of the business interviewed were franchises.

fig. 47 Business Types
Interviewed workplaces only (14%)



TENURE

The graphs show that the vast majority (81%) of interviewed workplaces own their premises, of which 39% have a leasehold and 42% a freehold. Less than 20% of interviewed workplaces are rented (17% having a sub-lease, and 2% a licence). However, the rental sector may be somewhat under-represented by the interviews, due to the high number of inaccessible micro businesses located in business centres.

As regards the distribution of tenures depending on business sector (fig. 48), there is a tendency for the manufacturing, vehicle repair, wholesale, construction, as well as transport and storage businesses to own their premises, while a slightly higher rate of information and communication, service and retail restaurant hotel businesses rent their workspaces. When comparing the size of businesses to tenure, micro and small businesses are more likely to rent than medium and large businesses (21% of all small and micro businesses rent, while only 12% of medium and large businesses do).

fig. 48 Workplace Tenure by Sector
Interviewed workplaces only (14%)

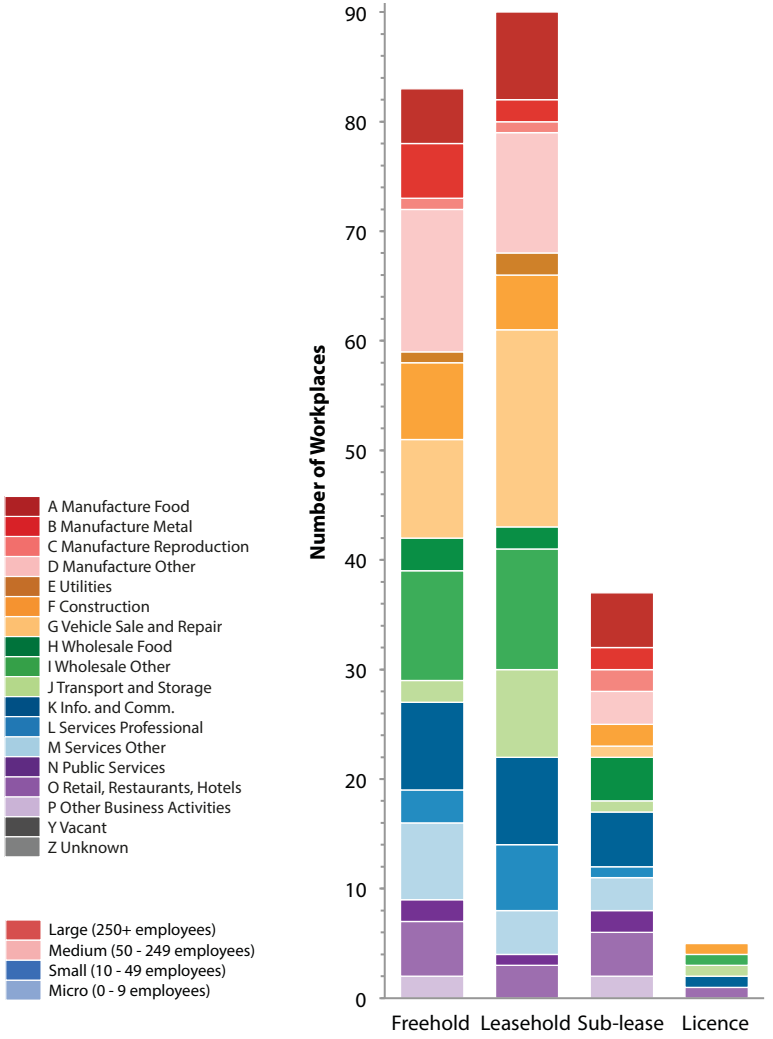
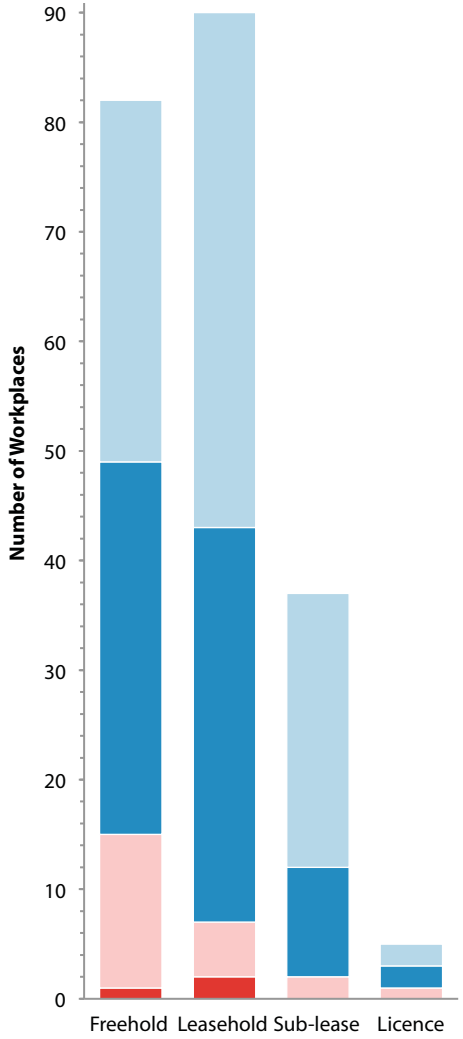


fig. 49 Workplace Tenure by Size
Interviewed businesses only (14%)



AGE & LENGTH OF TENURE

Some of Park Royal's oldest workplaces were interviewed, including well-known companies like McVities, established in 1830 moving to their Park Royal factory in 1902. The oldest surviving workplaces interviewed are almost exclusively in the manufacturing sector. Beginning in the 1930s, but becoming a clear trend in the late 1970s, workplaces in other sectors start to appear. The large majority of interviewed workplaces were established after 1980, when a greater number of workplaces in the wholesale, transport and storage and information and communication sectors were founded. In the last two years a greater number of vehicle sale and repair workplaces have been founded. Many of the interviewed workplaces were founded elsewhere before choosing to move to their current Park Royal premises. This is clearly demonstrated by the fact that while 35 workplaces moved to their premises in 2011, only 10 were established in the same year. Many of these businesses had been established several years earlier. The graph clearly shows that food businesses continue to move to premises in Park Royal as they have done throughout its history. 31% of interviewees have moved to their current premises since 2011.

fig. 51 Year Workplace Established Interviewed workplaces only (14%)

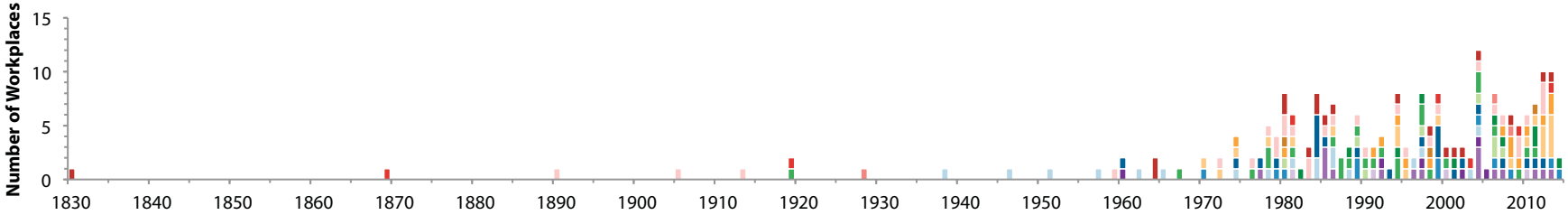
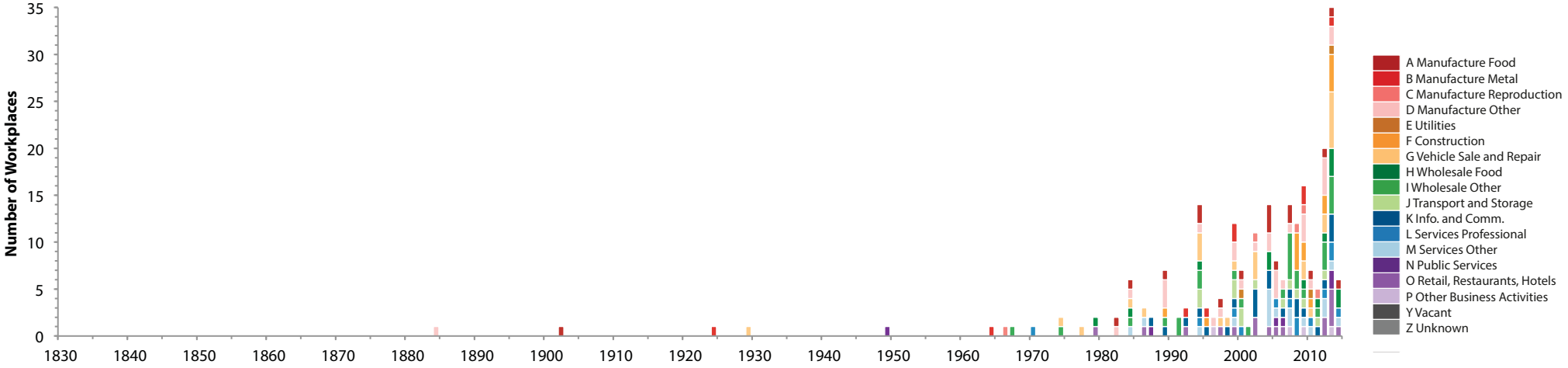


fig. 50 Year Workplace Moved to Current Premises Interviewed workplaces only (14%)



SUPPLIER AND CUSTOMER LOCATIONS

Interviewees were asked to select the locations of their primary suppliers and customers. On a first level the graphs of the accumulated responses show the important synergies within Park Royal of workplaces supplying each other. They also demonstrate that not only most of their customers, but also most of their suppliers are within London. The responses appear to give credence to Park Royal's status as both London's kitchen and workshop, with large numbers of food and other manufacturers as well as car repairs having a primarily local to London-wide customer base. They also highlight Park Royal's importance as a base for London wholesalers, who import huge varieties of products from the UK and overseas for local, London and UK-wide customers. The service sector has a more dispersed customer and supplier base with the biggest focus on overseas customers. From conversations it is clear that links to international transport hubs such as Heathrow and the proximity to London are important factors in the decision of many workplaces to locate in Park Royal.

fig. 52 Supplier Locations
Interviewed workplaces only (14%)

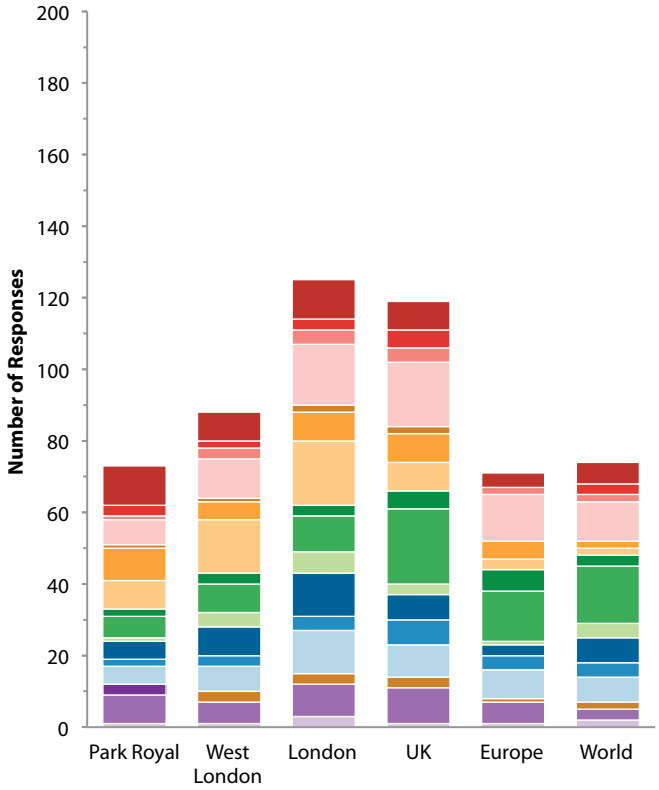
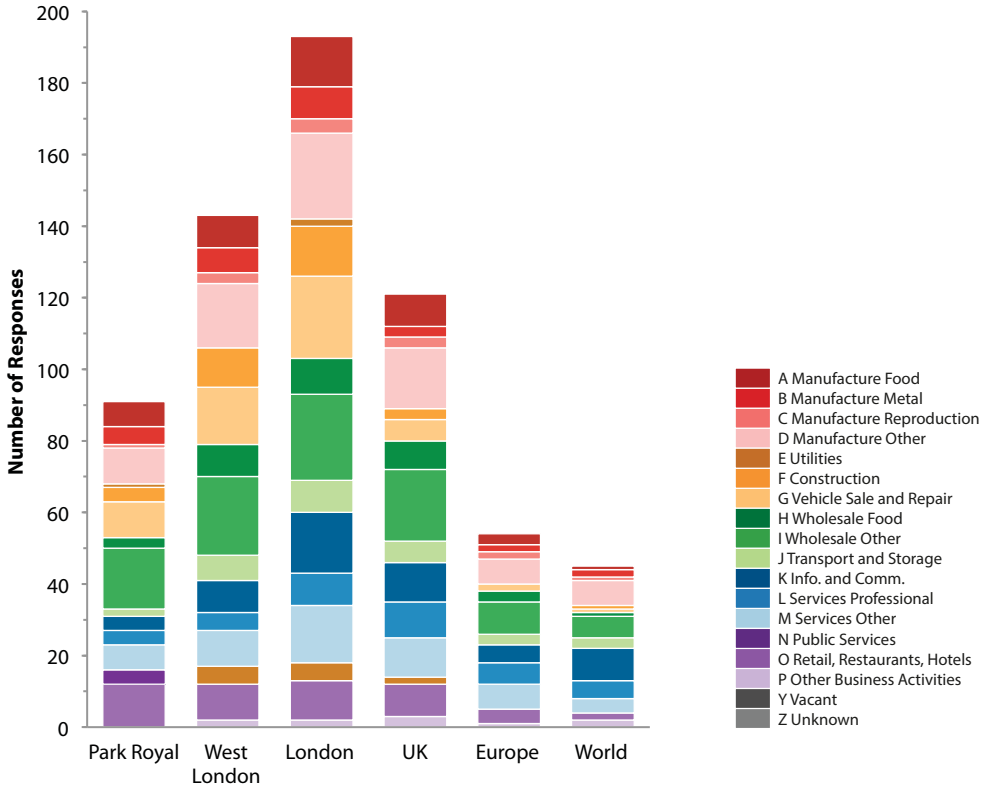


fig. 53 Customer Locations
Interviewed workplaces only (14%)



BUSINESS GROWTH

The overall response from interviewees was overwhelmingly positive when asked if they anticipated growth in employment or floor space at their workplace over the next year. 47% of workplaces anticipate an increase in employee numbers, and 27% anticipate that their workplace will need more space. The highest percentages of workplaces expecting growth are in the utilities (100%), food wholesale (83%) and the professional services sectors (70%).

The need for more floor space over the next year is anticipated by a large proportion of food wholesale (45%), followed by food manufacturing (37%), construction (36%) and information and communnication sectors (35%). By contrast, the large proportions of workplaces foreseeing a shrinkage in both employment and space were in the public services and other sector.

47% of workplaces anticipate employment growth

fig. 54 Anticipated Employment Growth over Next Year
Interviewed businesses only (14%)

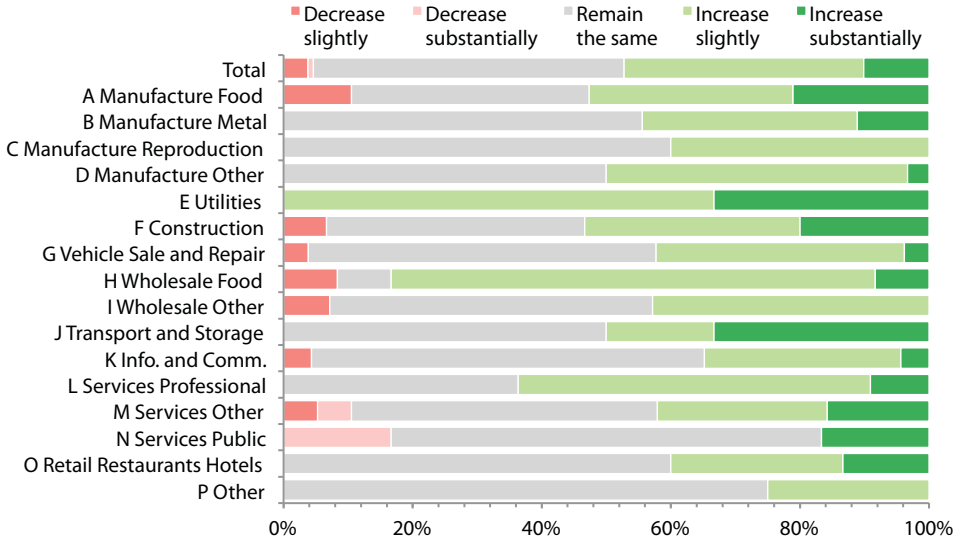
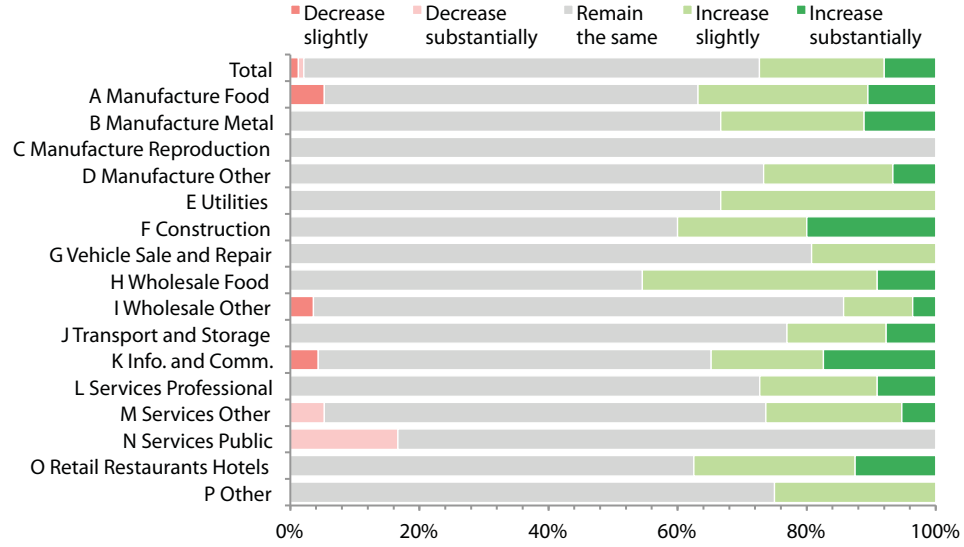


fig. 55 Anticipated Space Growth over Next Year
Interviewed businesses only (14%)



PRODUCTION

Interviewees were asked to provide an approximation of the quantity of products or services they provided last year. The following selection of their responses reflects the diverse range of activities undertaken within Park Royal.

fig. 56 Selected Workplace Production Figures

40,000,000 plumbing fittings manufactured
30,000 domestic removals completed
90 online interactive magazines created
24,000 books sold to university libraries
5 residential development projects delivered
8,500 book-related events organised
25,000 units of tools and equipment rented
1,400,000 postal and freight deliveries
12,000 lorries repaired
2,000 custom print jobs delivered
7 full length studio films processed
240,000 bouquets of flowers sold
15 cars converted to ambulances
7,200 sales of music equipment effected
94,000 hotel guests accomodated
3,000 hires of recording studio
42,000 hospital patients transported
1,500 stage and film lights rented
500 tonnes of coffee delivered
300,000 sushi rolls produced
500,000 tonnes of building waste processed
2,000 sqm of natural stone tiles sold
100,000 natural sea sponges sold
1,000 pallets of Balkan food imported
3,900 tonnes of laundry cleaned
1,000 tonnes of nuts roasted
50 tonnes of steel processed
1,000,000 hygiene tests conducted
50,000 car tyres sold










ADVANTAGES

Businesses were asked to identify three features of their current location in Park Royal which most benefited their business. Interviewees gave a wide range of responses which were collated to form approximately 20 interrelated themes. Below are the top 12 themes mentioned by businesses. The top three themes are all about accessibility, demonstrating that transport links are key for businesses across all sectors. Business clustering, space availability and proximity to suppliers and customers are also cited as important advantages of Park Royal.

IMPROVEMENTS

Businesses had less to say when asked to identify which three improvements to their locality would most benefit their business. Many of the responses clearly show that interviewees believe that an improved urban environment would benefit their business activities. Interviewees often focussed on specific aspects of their immediate urban environment with which they struggle, such as the quality of the roads and public space, a lack of easily accessible amenities, insufficient car parking, poor footfall, safety and in some areas, poor public transport accessibility.

fig. 57 Advantages of Location Mentioned by Businesses
Interviewed businesses only (14%)

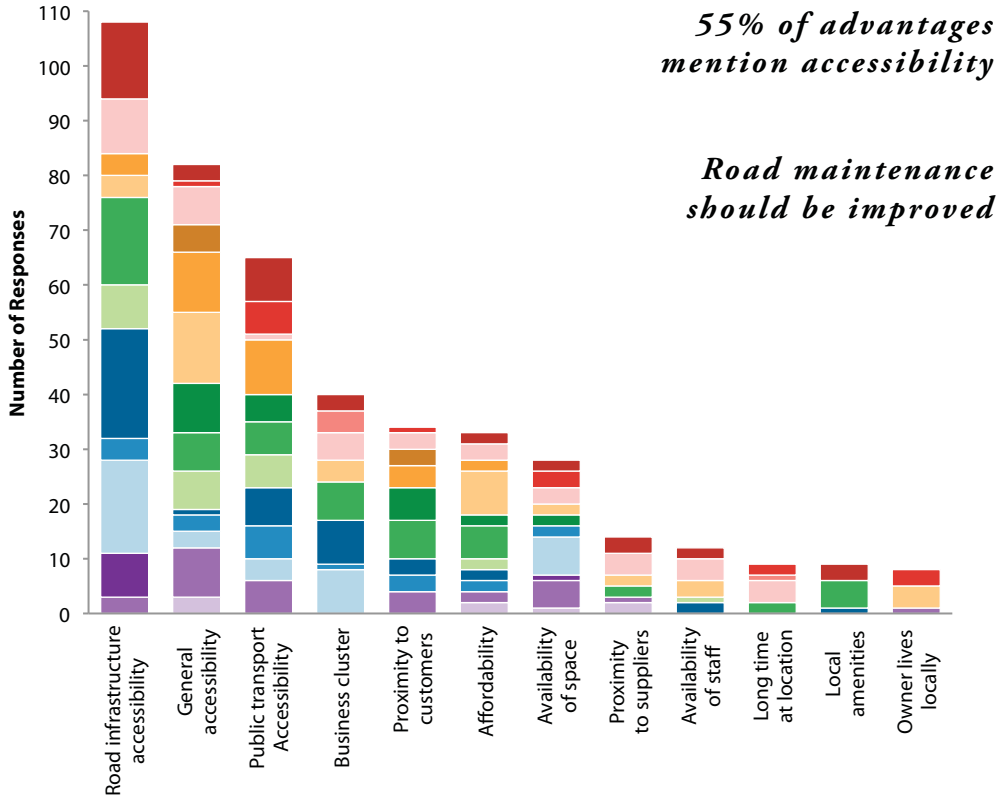
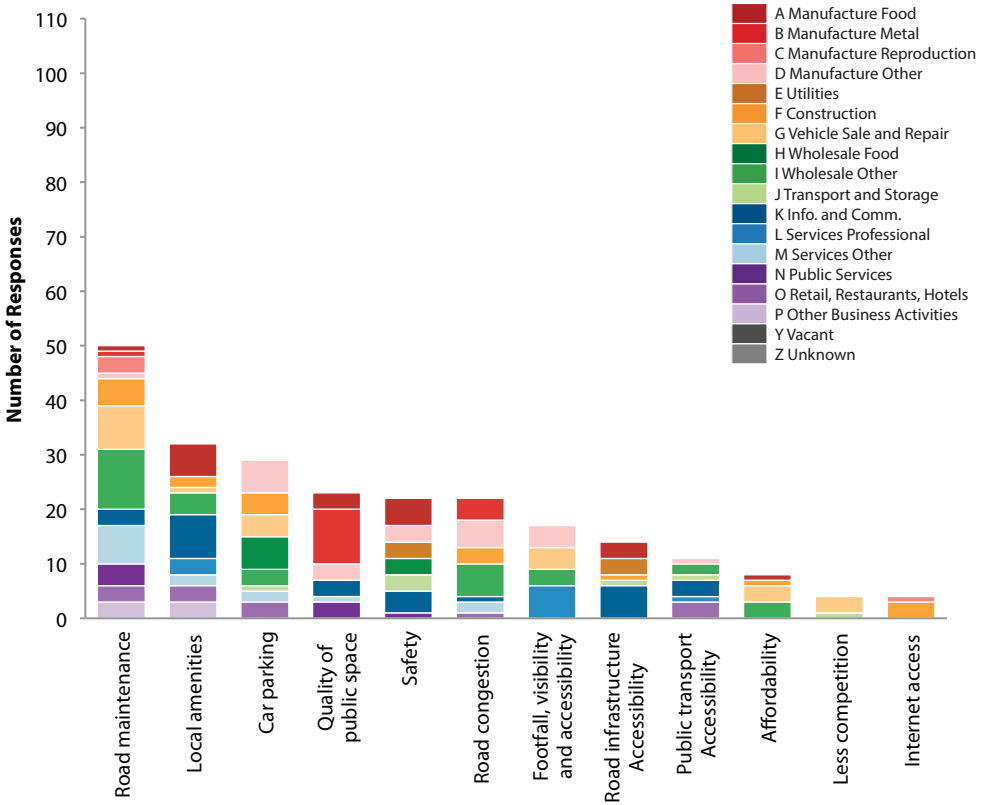


fig. 58 Improvement for Location Mentioned by Businesses
Interviewed businesses only (14%)



CONCLUSION



CONCLUSION

FINDINGS

The Park Royal Atlas is the first ever detailed study of the capital's largest industrial estate, often dubbed 'London's Kitchen'. Relatively little was known about the diversity of Park Royal's businesses and their role in London's economy until now. The research uses data collected from months of surveying and interviews to give an insight into what people produce, the facilities they operate from and the improvements they would like to see.

The Park Royal Atlas uncovers a great diversity of thriving businesses. Taking its name from the 1903 Royal Agricultural Show, the area has played an important historical role in supplying London with everything from McVitie's digestive biscuits to Routemaster buses, Elizabeth Arden's cosmetics to Heinz soups. It also has been a longstanding host to the film and media industry due to its proximity to the BBC at White City and West London's many film studios.

Based on a door-to-door survey of workplaces by a team of researchers, the Atlas uses a mix of quantitative and qualitative research tools and techniques to discover Park Royal's local economy and the people it is made up of. Maps, graphs and case studies paint a detailed picture of the area.

The analysis of the survey data identified 1,934 active workplaces spread across a broad range of business sectors including breweries, bakeries, metal workshops, storage, contractors, joiners, hospitals, schools, publishers, film studios, software developers, garages, car sales, pubs, hotels, jewellers, cobblers, lawyers, accountants, spice merchants, medical suppliers, churches and artist studios.

Geographically mapped, these sectors form a diverse patchwork with little obvious clustering. The different buildings and space types, such as offices, workshops and warehouses, are each used by a range of businesses, although different sectors have their preferences. 30% of workplaces are small office type spaces, though workplaces in large warehouses make up 63% of the total floor area. The central areas of Park Royal stand out for having the greatest diversity of buildings and space types. Many of these are used by micro businesses which count for 75% of workplaces and contribute to the estimated 31,000 plus employees in Park Royal.

The Atlas divides Park Royal into 18 survey areas each of which has a distinct geography and special character based on its physical environment, buildings, businesses and people. The case studies highlight the important role that entrepreneurs and employees play, their skills, the pride they take in their work and their opinions. They provide the energy that goes into running each individual business. The case studies reveal inspiring examples of entrepreneurs running businesses ranging from biker cafés to advanced electronics and software development, mannequin making to smart recycling, theatrical prop construction to baking and juice pressing.

Of the 14% of total businesses interviewed, 64% of employees work for small or medium sized enterprises (SMEs) and 51% live locally in Ealing, Brent or Hammersmith and Fulham. A large proportion of these workplaces own their premises (81%) and most are independent businesses (61%). A third of those interviewed moved to current premises since 2010. Change and churn is a constant feature in thriving industrial areas, which is why this Atlas can only be seen as a snapshot of the current situation.

Due to the scale of the industrial area there is a large amount of business to business trading and over half of all supplier locations are within London. The workplaces focus on supplying a diverse range of products and services to London. The survey identified that in the last year alone individual Park Royal businesses provided London with 240,000 bouquets of flowers, 300,000 rolls of sushi, 3,000 recording sessions and supplied 24,000 books to university libraries.

Nearly half of the businesses expect employment growth over the next year, which shows great confidence. Seen alongside low vacancy levels this suggests that Park Royal is in demand as an industrial location. Interviewees commented that public transport and road accessibility are the main advantage of their location.

In summary, it is fair to say that Londoners should be extremely proud of Park Royal. Hidden behind infrastructure, fences and non-descript warehouses is a thriving and extremely mixed industrial area. There are many independent small and medium sized businesses, as well as strong and emerging household brands that reflect a broad cross section of the goods and services that are "Made in London".

NEXT STEPS

There is change on the horizon. The eastern corner of Park Royal, named Old Oak Common, is set to be transformed when a 'super hub' High Speed 2 (HS2) and Crossrail Station is built by 2026. Old Oak Common will become a new district with up to 24,000 new homes and more than 55,000 jobs. This is why this study is well positioned to form the basis of an emerging informed dialogue between businesses, local communities and the public sector on how to strengthen and enhance the important industrial offer. The next steps are to:

Communicate the findings of the Atlas to the Park Royal community and beyond, by, for example, developing a dedicated web platform for engagement.

Further engage businesses, residents, local business groups and other stakeholders to develop more detailed knowledge of particular sectors and their aspiration in Park Royal.

Carry out a more in-depth local employment land planning study of Park Royal based on the data collected for the Park Royal Atlas to define demand and capacity of land and inform planning decisions.

Develop a long-term planning framework for Park Royal setting out a long term vision including assessment of existing infrastructure, public realm and building qualities and guidance for development coming forward.

Develop a prioritized project plan of interventions (public and private, people-based and physical) that can help strengthen Park Royal's places and businesses.



