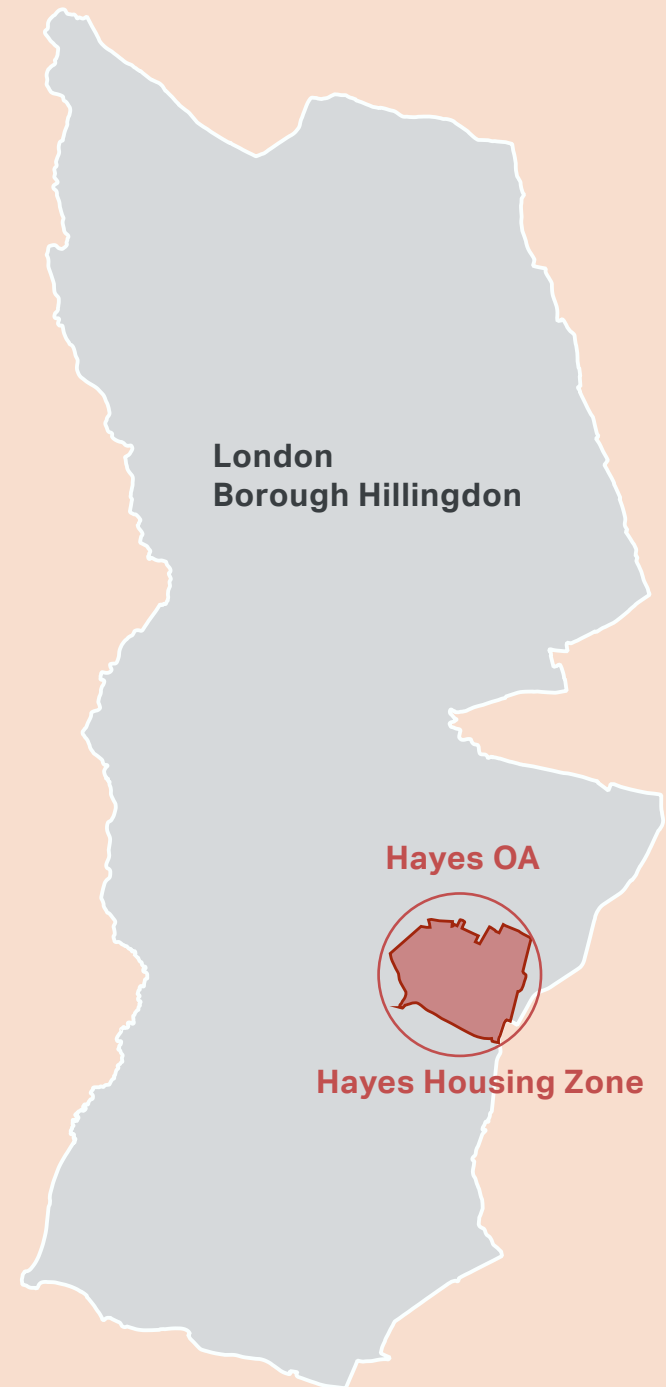


Opportunity Area Portrait

Hayes



Introduction

List of acronyms and abbreviations

- OA: Opportunity Area
- LP: London Plan
- GLA: Greater London Authority
- TfL: Transport for London
- OAPF: Opportunity Area Planning Framework
- CAZ: Central Activities Zone
- LESD: London Employment Sites Database
- SHLAA: Strategic Housing Land Availability Assessment
- LB: London Borough
- RB: Royal Borough
- AAP: Area Action Plan
- SPD: Supplementary Planning Document
- SIL: Strategic Industrial Land
- LSIS: Locally Significant Industrial Sites
- BID: Business Improvement District
- CEZ: Creative Enterprise Zone

Introduction

Purpose of this document and clarifications



What is a pen portrait:

- A strategic analysis/ summary of an OA.
- We collected a series of data on delivery of homes, jobs, town centres and high streets, transport, land use and industrial land to assess local change at a strategic level, to better understand places in the OAs, and evaluate how they are performing against the expectations in the London Plan 2021.



How will this information be used?

- This evidence base supports the OA propositions in the Towards a new London Plan document.
- The OA propositions include:
 - change in the status of the OA to reflect the housing and/or infrastructure delivery since 2019
 - highlight opportunities to review the OA boundary and/ or OA designation.



Data sources and clarifications

Homes

- The London Plan 2021 identifies indicative homes capacities (10 year, 22 year).
- The indicative homes capacities are based on the SHLAA 2017.
- The monitoring year for the London Plan 2021 starts in 2019.
- This document includes an overview on the progress against the SHLAA 2017 to understand what has happened in the OA.
- Acknowledging that a lot has changed since 2017, including the adoption of new development plans, the current document provides an overview of site allocations based on the latest publicly accessible information.
- All spatial data is available in the London Datastore, unless stated otherwise.
- All data relating to development progress is available via the Planning Data Hub, unless stated otherwise.

Introduction

Purpose of this document and clarifications

Data sources and clarifications

Jobs



- The LESD is a database that records recently completed employment developments and those in the pipeline in London to produce an estimate of London's additional employment capacity.
- Since the adoption of the London Plan 2021, a new London Employment Sites Database was produced in 2021. This provides up to date estimates by OA.
- A jobs dashboard has been produced to monitor the jobs' performance in the OAs.

Local Plan status



- Local Plan status information is based on publicly available data, or information received by the boroughs.

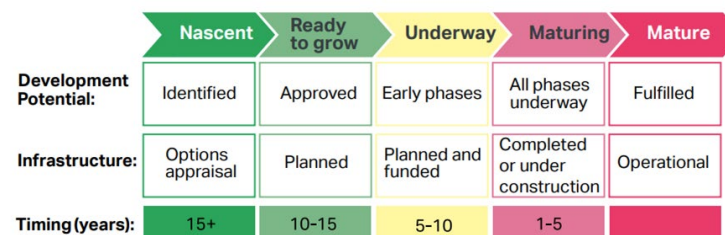
OA boundaries

- The London Plan designates OAs, whilst the boundary can be adopted through development plans. See more on [OA boundaries](#).

OA status - London Plan 2021

- The OA categorisation in the Key info refers to the London Plan 2021 Figure 2.2 - OAPF process diagram, also shown below:

Figure 2.2 - OAPF process diagram



Additional resources

- Growth Corridors: [Engagement summaries from Planning for London events \(November/December 2024\)](#)
- Opportunity Area monitoring GLA [webpage](#).

Introduction

Contents

Context

Key info

Transport
and
connectivity

Delivery of
homes

SHLAA 2017

Site
allocations

Development
activity 2021
and 2024

Jobs

Town Centre
and High
Streets

Industrial
Land

Place
strategies*

Moving
forward

* This section refers to existing/ emerging strategies for the OA.

Hayes

Context

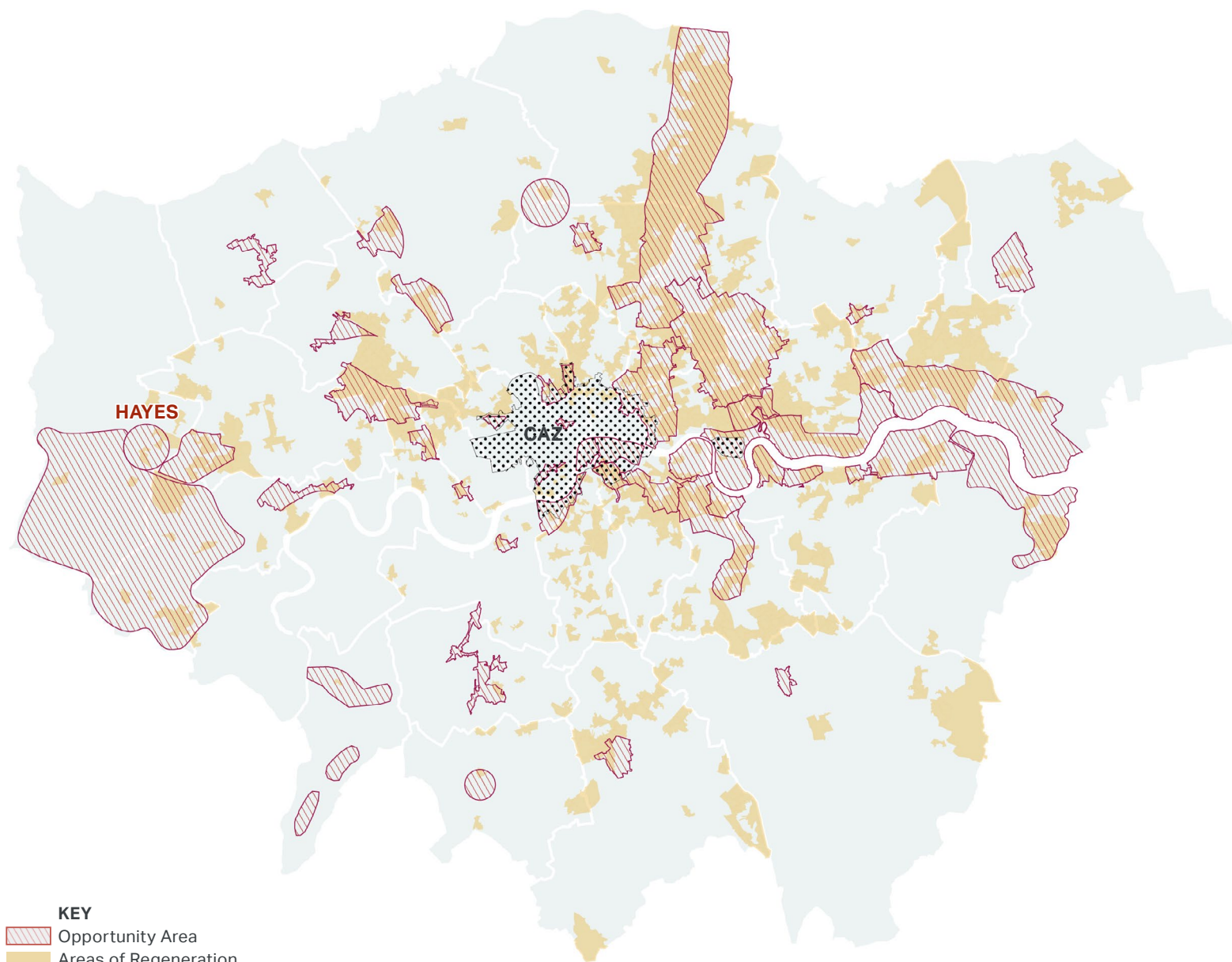
OAs in the CAZ

- King's Cross (Maturing)
- Tottenham Court Road (Maturing)
- Victoria (Maturing)
- Waterloo (Maturing)
- London Bridge/ Bankside (Maturing)
- Euston (Ready to Grow)
- VNEB (Underway)
- Elephant & Castle (Underway)
- Part of City Fringe/ Tech City (Underway)
- Paddington (Underway)

The OA is not within the CAZ.

Areas of Regeneration

Hayes Town Centre is identified as an area of regeneration. Furthermore, there are some areas of regeneration in the northeast part of the OA.



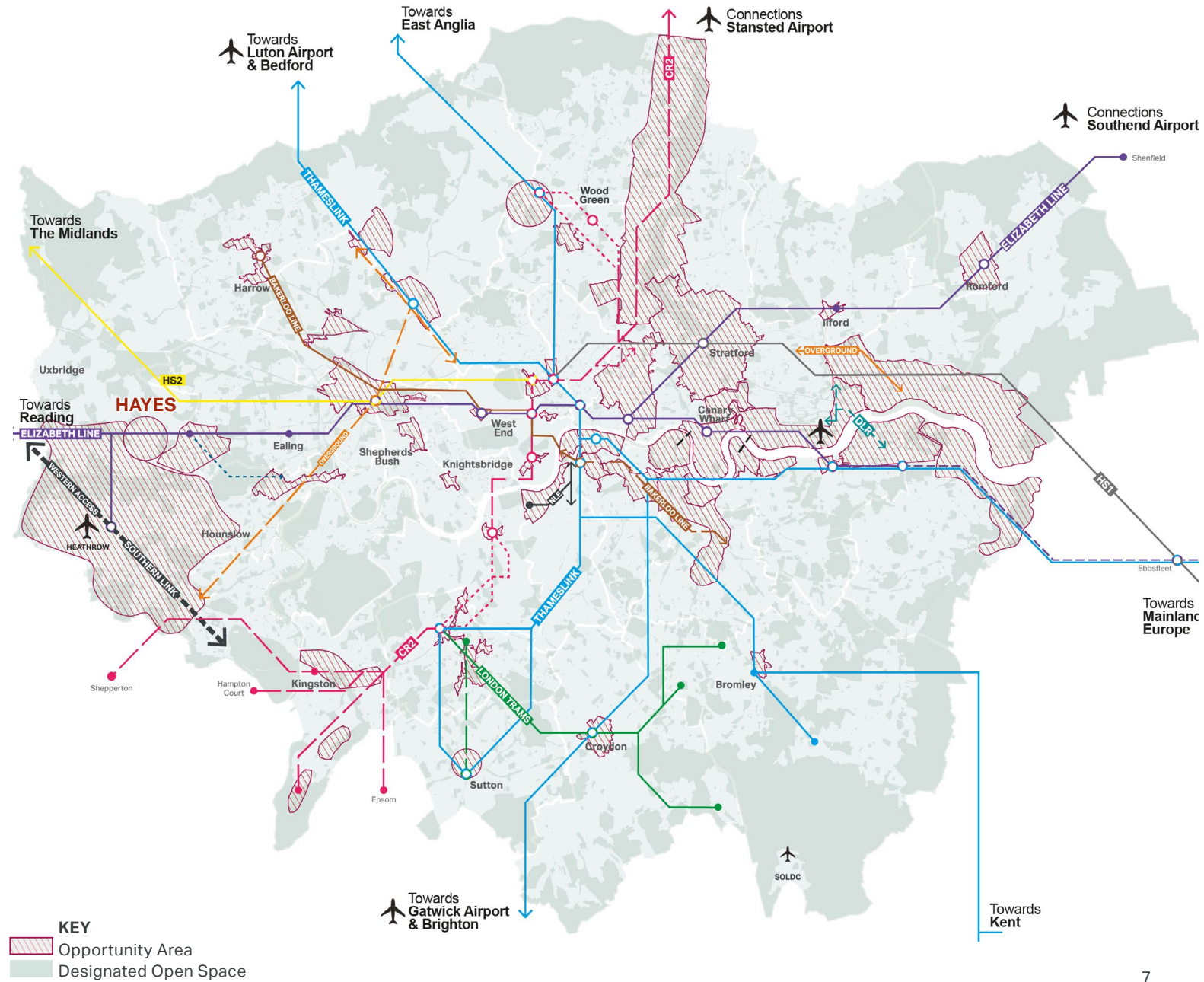
Source: Areas of Regeneration as per London Plan 2021

Hayes

Context

Transport and Growth Corridors

- Hayes OA is part of the Elizabeth Line corridor (West).



Source: Planning Data Map

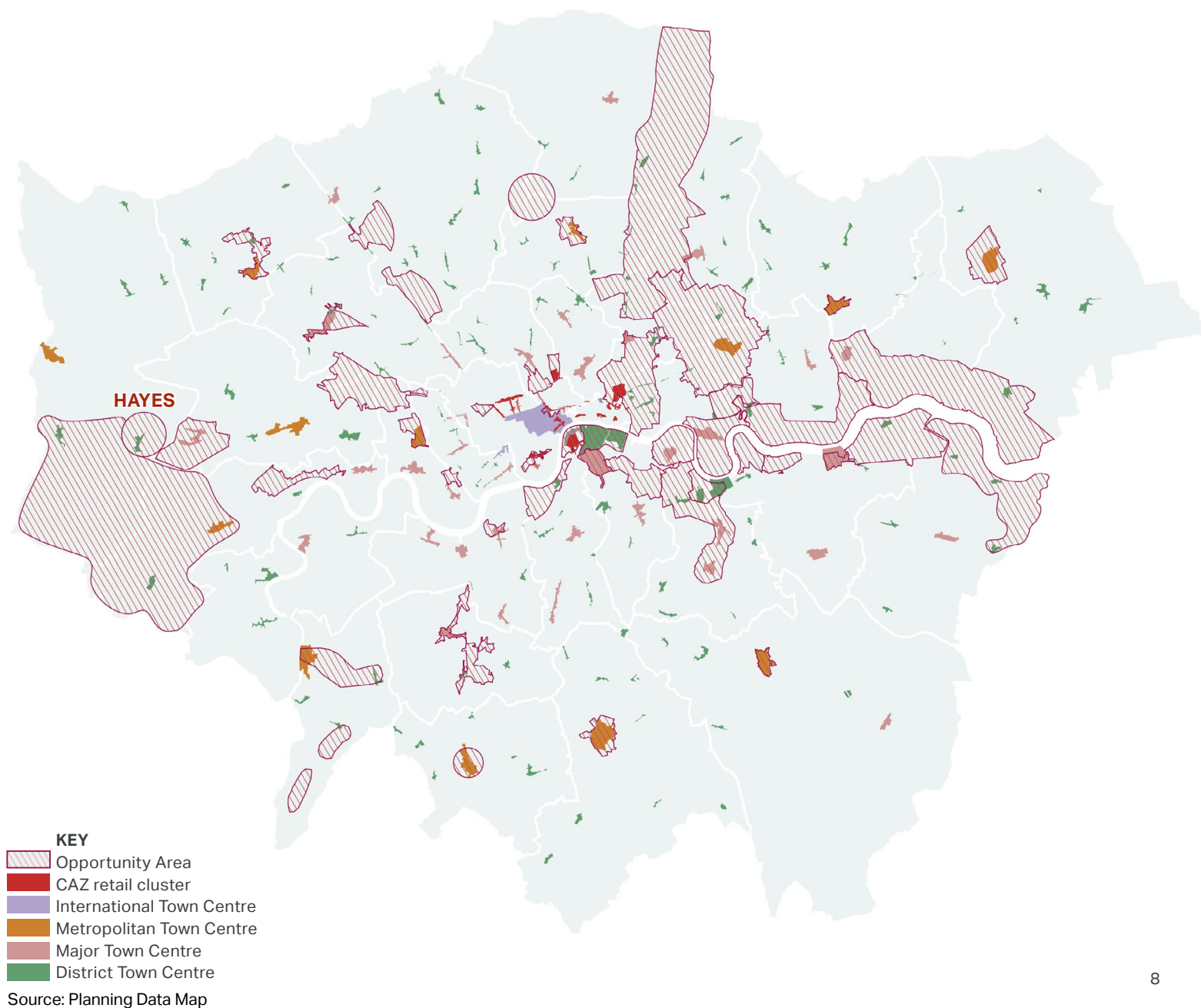
Hayes

Context

OAs and Metropolitan Town Centres

- Olympic Legacy (Maturing)
- Harrow & Wealdstone (Underway)
- White City (Underway)
- Croydon (Ready to grow)
- Romford (Ready to grow)
- Ilford (Ready to grow)
- Wood Green (Nascent)
- Kingston (Nascent)
- Bromley (Nascent)
- Sutton (Nascent)

There are no metropolitan town centres in the OA, but **Hayes District Town Centre** is within the OA indicative boundary and the Hayes Housing Zone.



Hayes

Key info

London Plan Designation Year

2004 2008 2011 2016 2021

Borough

LB Hillingdon
Area

Tottenham
Court Road
19 ha



Hayes
30 ha

Lee Valley
3,926 ha

OA specific plans

N/A. There is an Development Infrastructure Study for the Housing Zone (2017)

Local Plan status

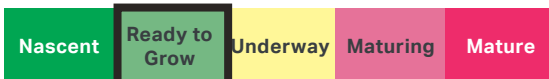
Adopted (2020)

Growth Corridor

Heathrow/Elizabeth Line West

Housing Delivery Test 2023 Action Plan

OA status (London Plan 2021)



London Plan 2021 capacities by 2041



Note: Hayes OA was first introduced in the London Plan 2004 as part of the Hayes/ West Drayton/ Southall/ Stockley Business Park OA. In the London Plan 2008 the OA is part of the Heathrow OA (including Hayes, West Drayton, Southall, Feltham, Bedfont Lakes and Hounslow). Similarly in the London Plan 2011 and 2016. In London Plan 2021 Hayes OA is identified as a separate OA. The Hayes Housing Zone was established in 2016.

Source: Google Earth

KEY

- Opportunity Area (indicative)
- Housing Zone

**Note that the LESD (2021) increased the capacity to 1,400 new jobs

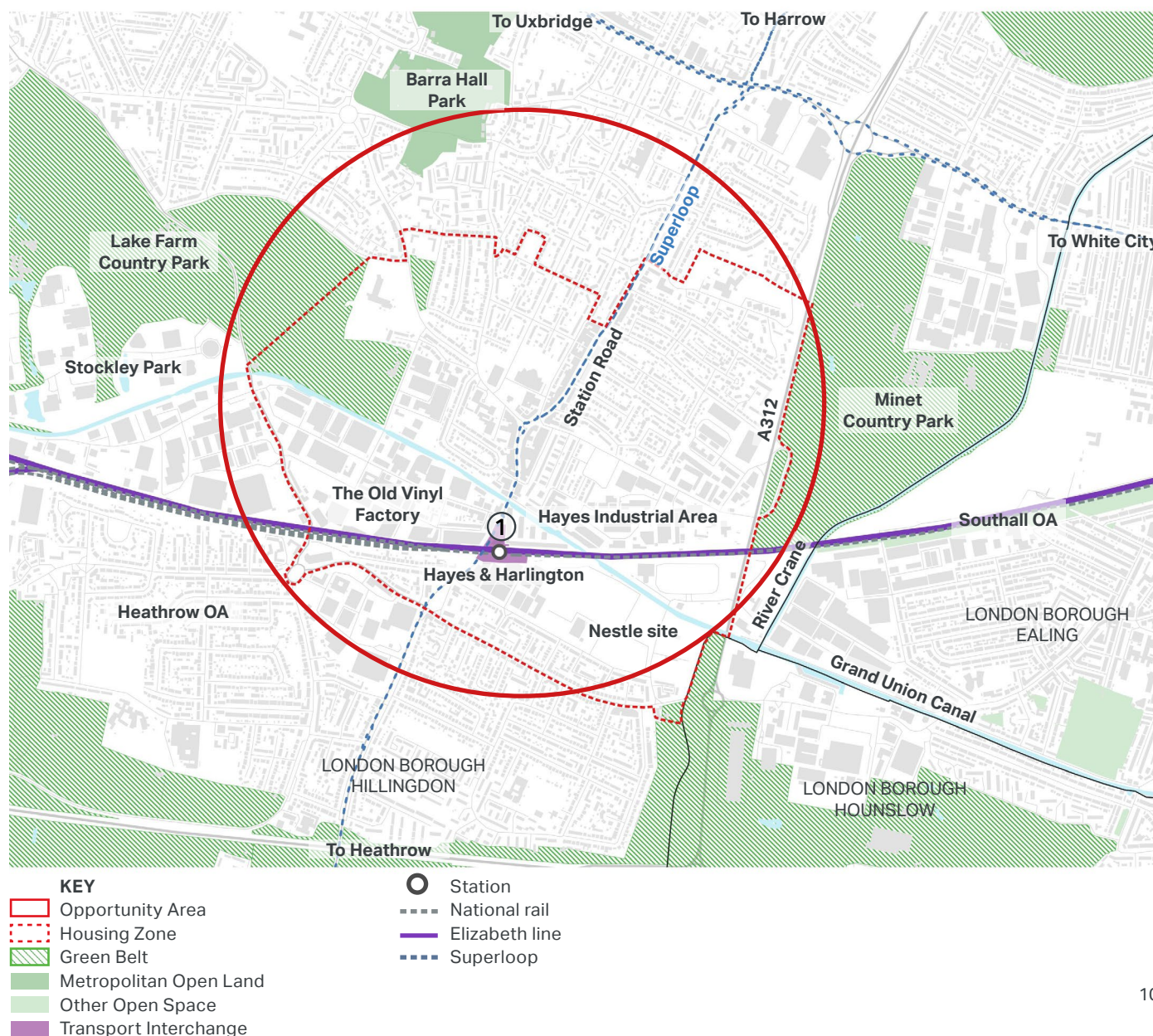
Hayes

Transport and connectivity

- Elizabeth line station opened.
- Two Superloop routes; SL8 Uxbridge to White City and SL9 Heathrow Airport to Harrow.
- LIP funding has been used to improve the public realm.
- Through the Mayor's Good Growth Fund grant LB Hillingdon are planning a programme of work to better connect the new Elizabeth Line station to the high street, The Old Vinyl Factory development and Town Centre more broadly.
- Some identified projects to be funded or undertaken by developers and infrastructure organisations.

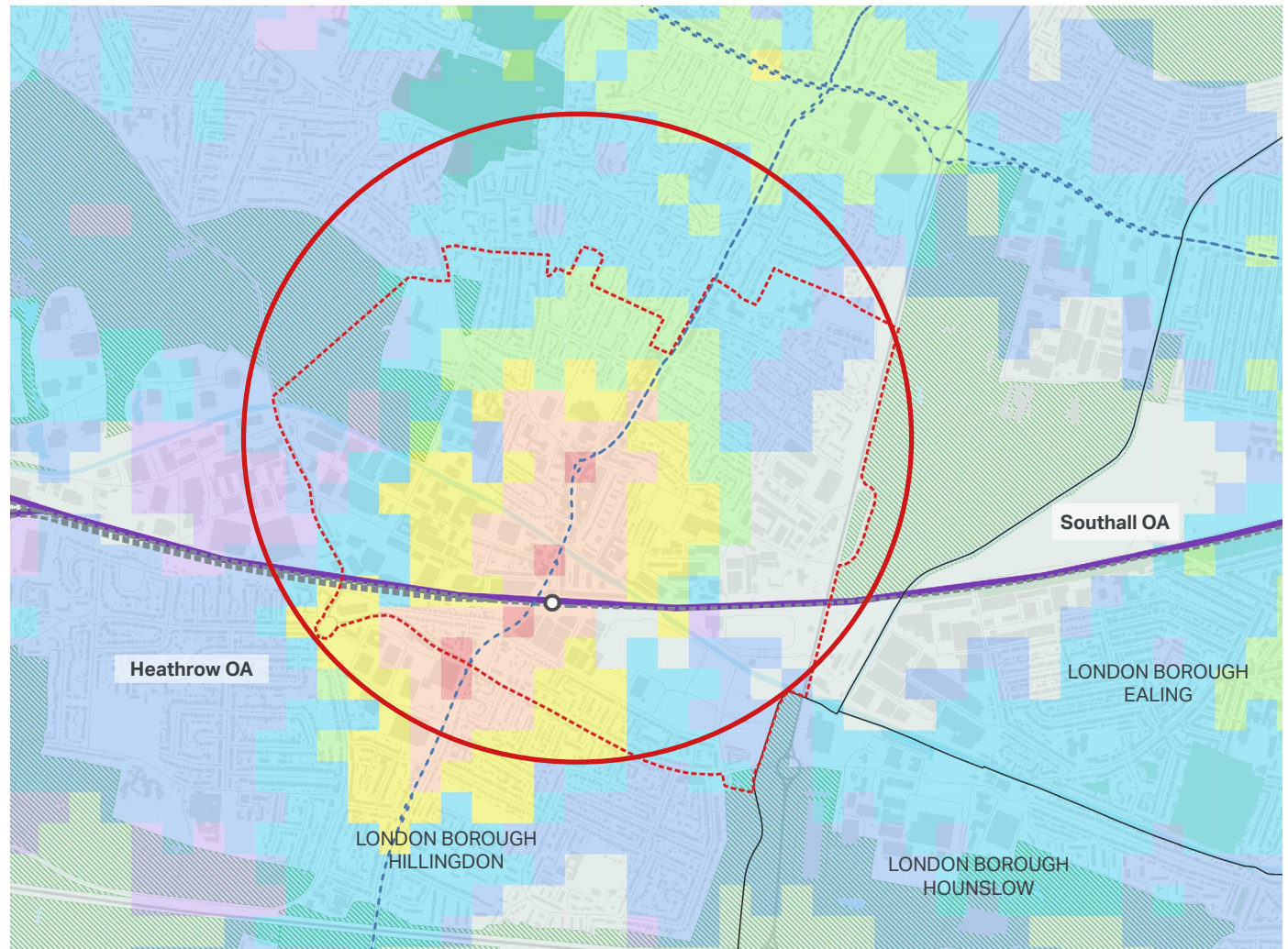
Social infrastructure

- Beyond transport infrastructure, social infrastructure is essential to support and underpin the housing development.
- Engagement with the borough suggests that there is need to ensure timely and integrated delivery of supporting infrastructure to ensure sustainable neighbourhoods for communities.

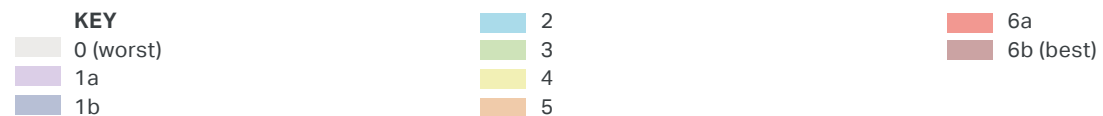


Hayes

Transport and connectivity: PTAL 2031



Source: Transport For London



Hayes

Delivery of homes

Delivery pre-2019

Completions since designation against capacity

LP 2004 **5,800**

LP 2016 **9,000*****

Completed **1,625**

Considering the indicative capacities pre-2019 refer to a wider area (West Drayton, Heathrow etc), the OA has delivered a significant amount of homes pre - 2019 (a third of its capacity at designation).

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity

22 yr **4,000**

10 yr **3,707**

Completed **1,314**

Pipeline** **2,476**

The OA is delivering at a rate of 262 homes/year, against the indicative rate of 181 homes/year. The completions and the current pipeline would enable the OA to meet its 10-year capacity.



KEY
 [Red outline] Opportunity Area
 [Purple circle] Pipeline (Planning Datahub, May 2023). Size of circle is proportionate to the number of homes.

*Completions account for all types of supply between 2019/2020 to 2023/2024.

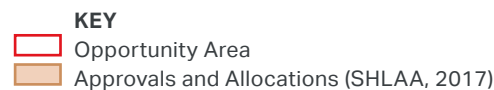
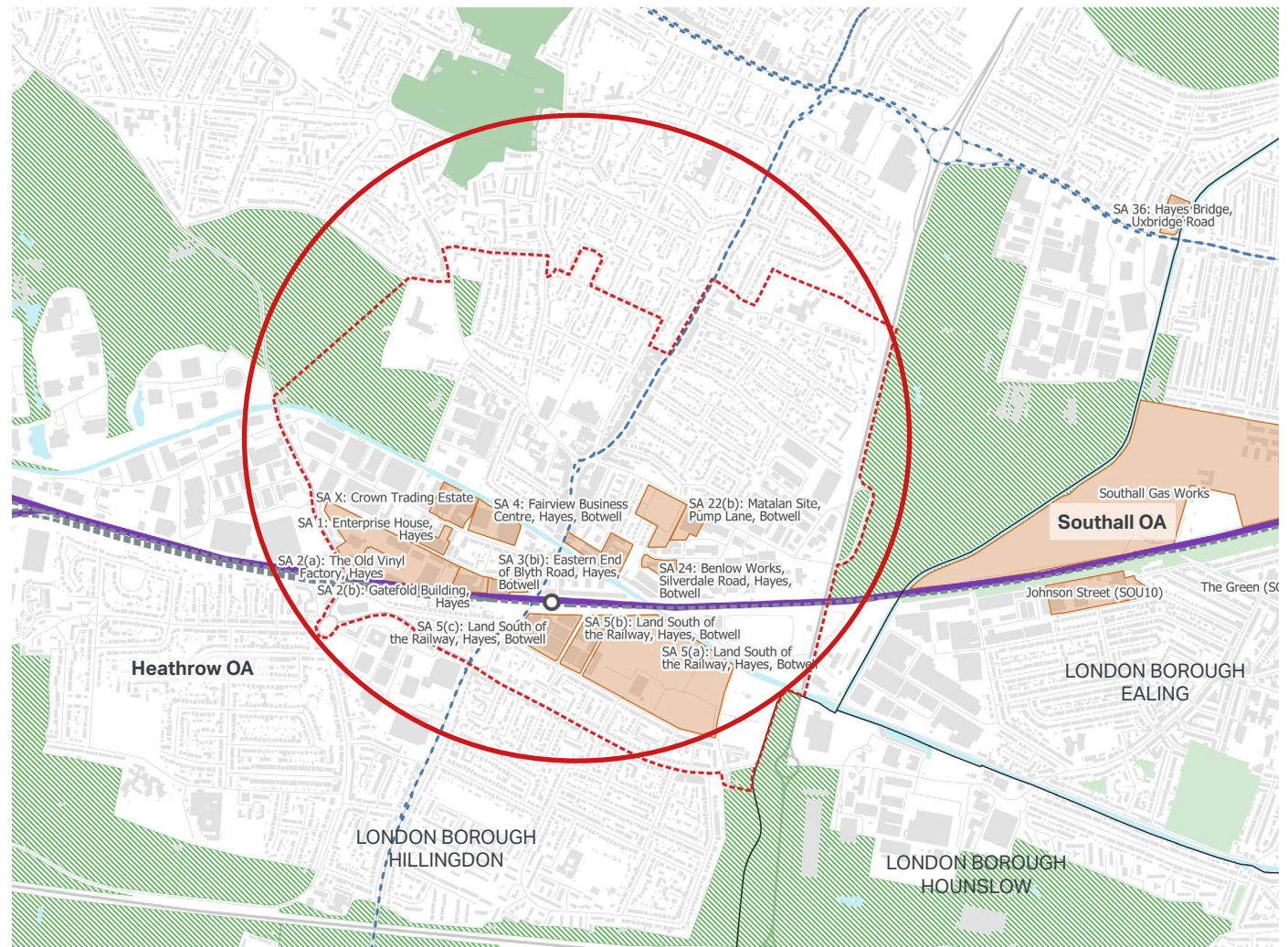
** [Residential Pipeline in 2023/2024](#)

*** The capacities are not comparable due to the OA being part of a larger area pre-2021. In the London Plan 2008 the OA is part of the Heathrow OA (including Hayes, West Drayton, Southall, Feltham, Bedfont Lakes and Hounslow). Similarly in the London Plan 2011 and 2016. In London Plan 2021 Hayes OA is identified as a separate OA.

Hayes

SHLAA 2017: Approvals and allocations

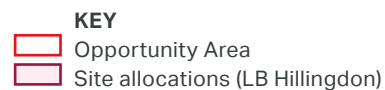
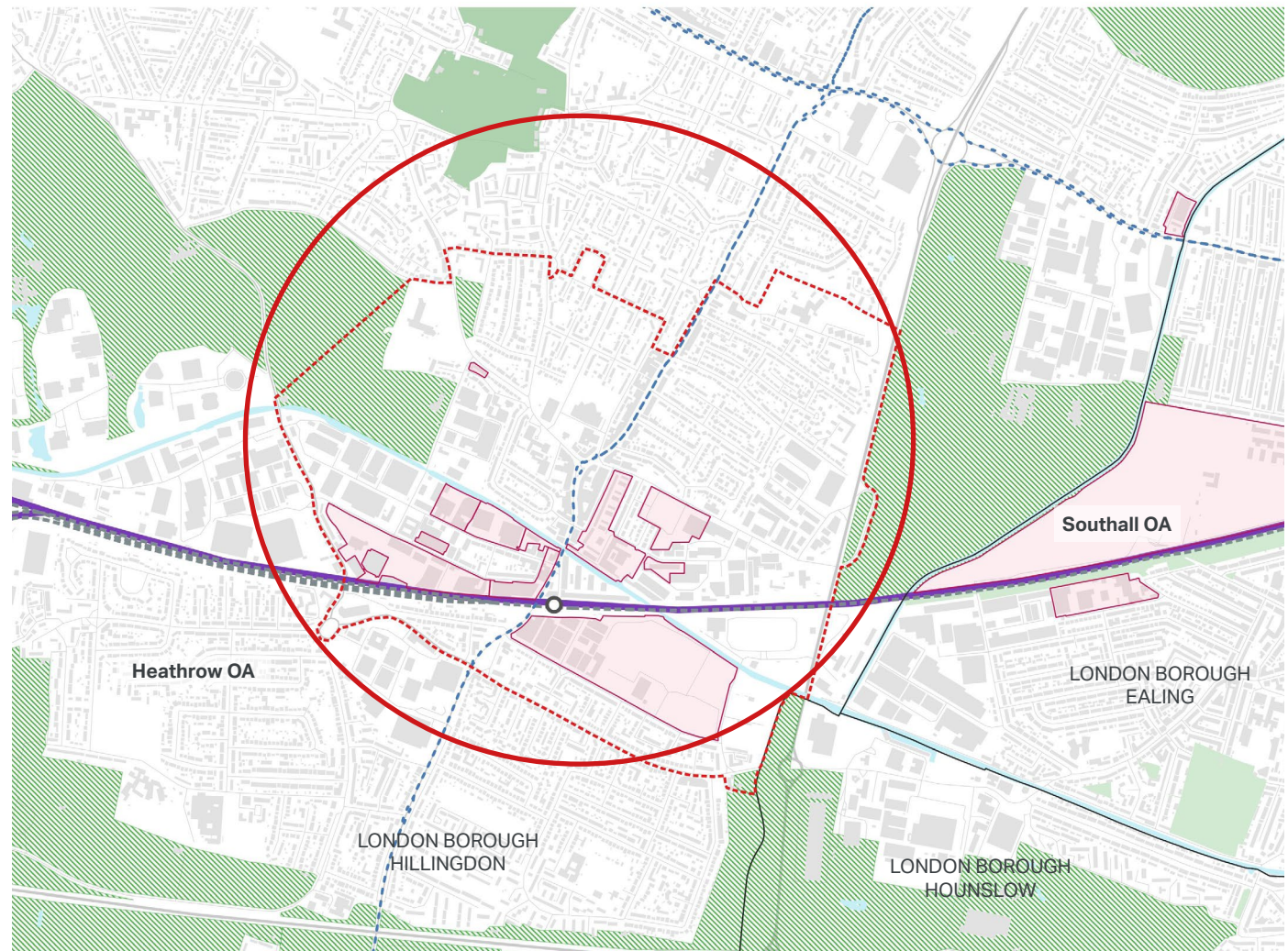
- Allocations along the Elizabeth Line corridor and around the station.
- Some strategic site include the Nestle Site (Land South of the Railway, and the Old Vinyl Factory (north of the Railway).
- Worth noting that just to the east of the OA there is Southall



Hayes

Site allocations: Local Plan 2020

- Development and plan making has progressed since the SHLAA 2017.
- Hillingdon adopted their Local Plan in 2020, identifying Hayes as an area where the majority of housing growth is expected to take place
- The diagram shows the site allocations as per adopted Local Plan.
- Currently the LPA is developing their new Local Plan, and they completed their call for sites in summer 2024.
- Consultation on the proposed submission version of the Local Plan is programmed for early 2025.



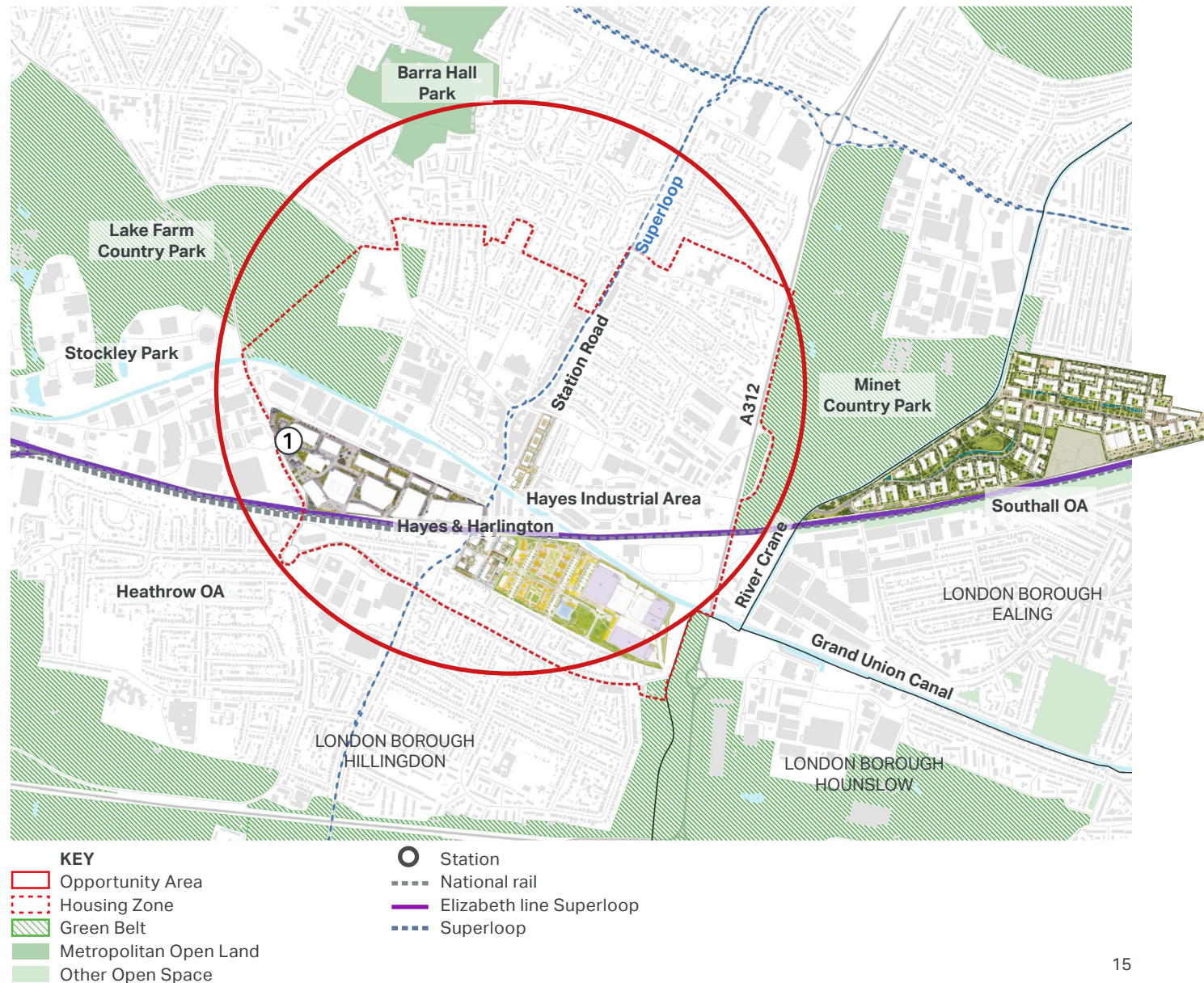
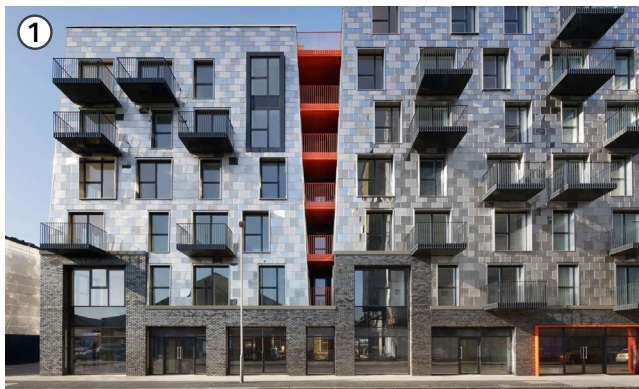
Hayes

Site allocations: Local Plan 2020



The Old Vinyl Factory (completed):

- Latest phase approved in 2020. 642 new homes
- 550,000 sq ft of office space, an academy school and a portfolio of retail and leisure facilities anchored by an arthouse cinema will opened in 2021.
- First homes delivered in 2019 July - 376 homes have been delivered by HUB and Be:here.
- **Some stalled phases:** The Multi-Storey Car Park Site (Veneer Store), the Large Office Building (Cabinet Building) the Cinema (Pressing Plant) and the Music Venue/Workspace (The Powerhouse).

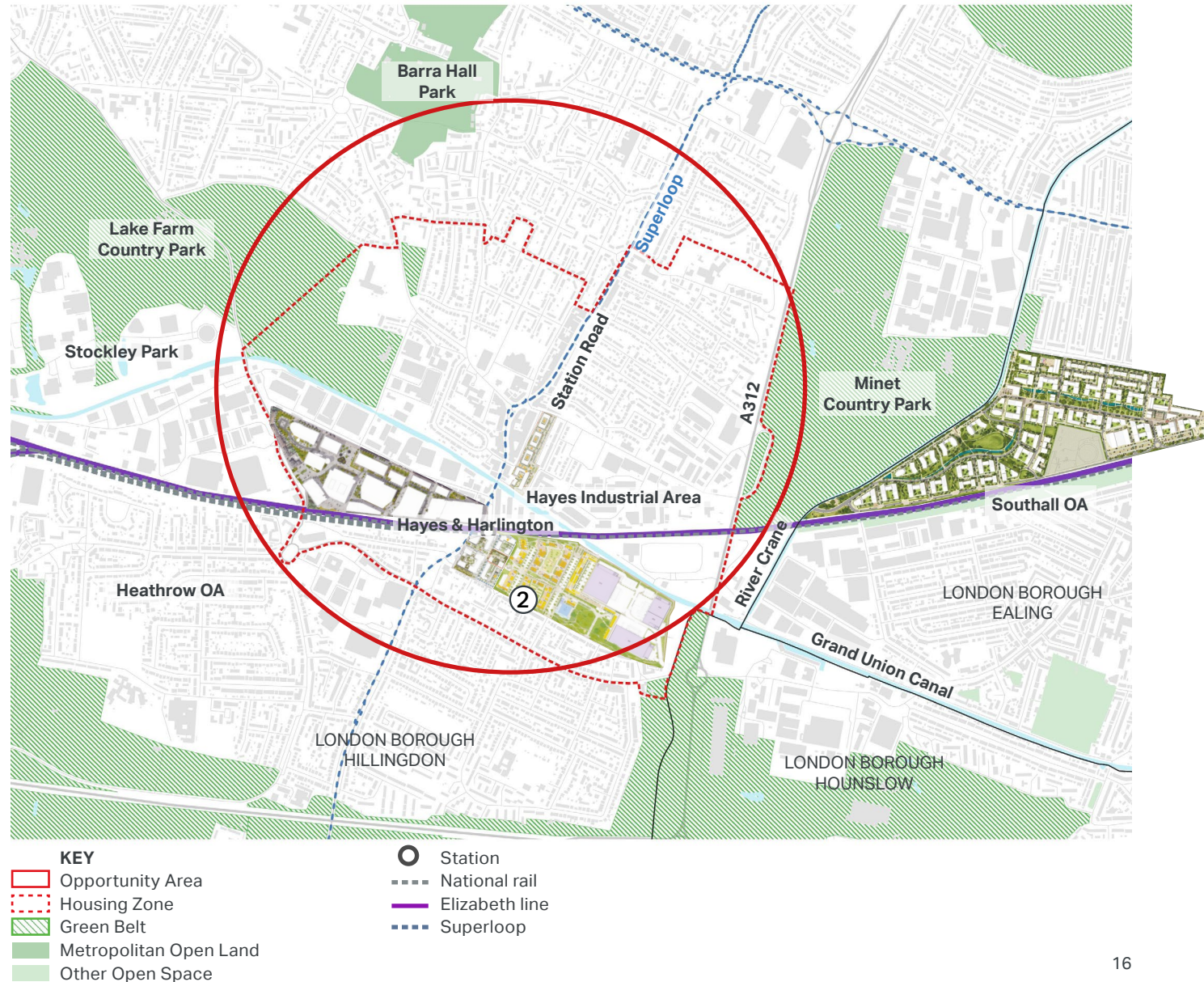


Hayes

Site allocations: Local Plan 2020

Nestle Site (on site)

- Industrial - house builder joint venture.
- 22,500 sqm industrial space, and 1,500 new homes.
- In 2016 Joint GLA/LBH work starts on spatial strategy for Land South of the Railway.
- In May 2017, SEGRO/Barratt application for Nestle factory site submitted.
- In 2021, 40% affordable housing (with grant) secured via S.73 and S.106 deed of variation.
- Approach is retaining the site's heritage and art deco facades.



Hayes

Site allocations: Local Plan 2020

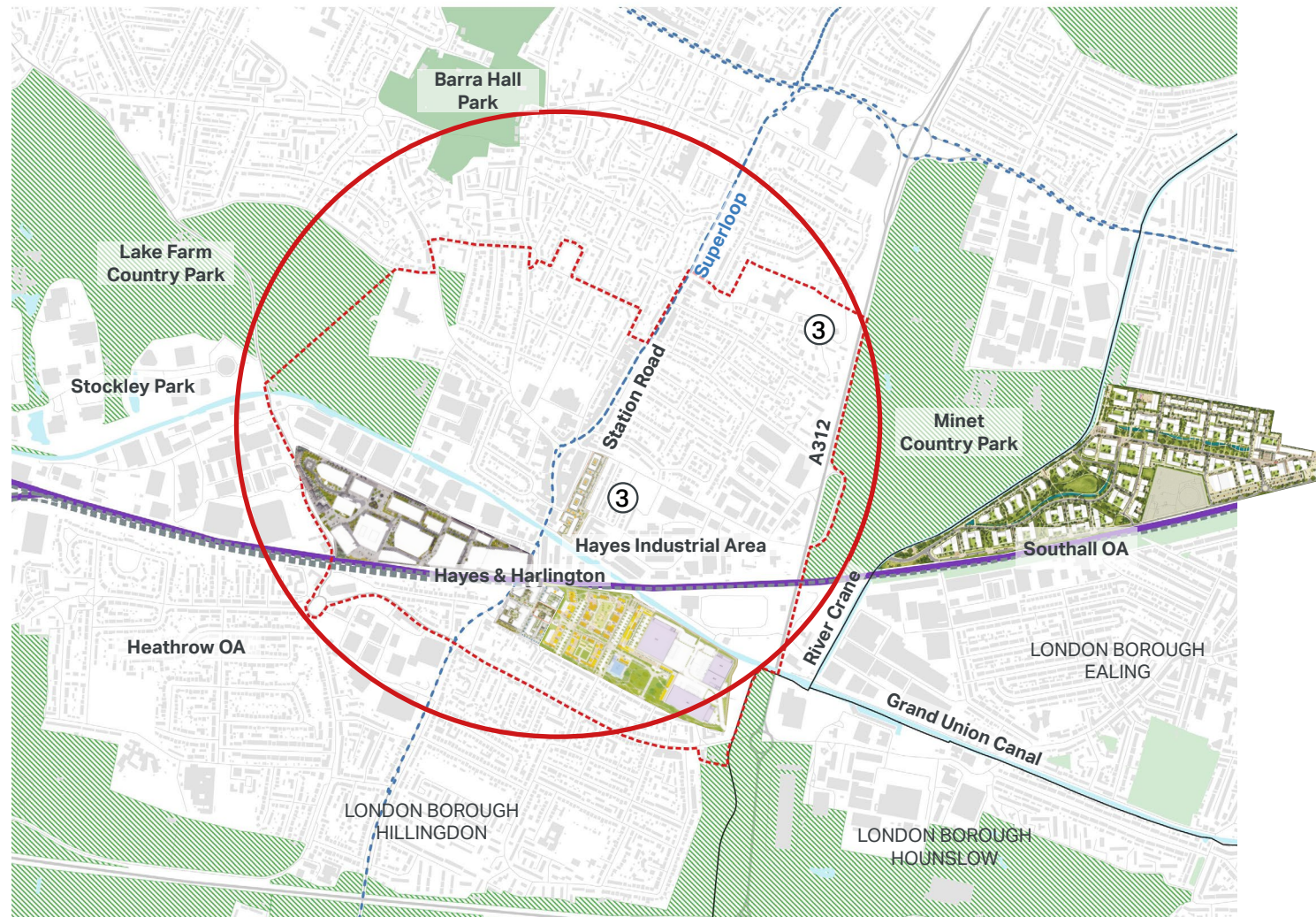


③ Hayes Town Centre Estate (on site)

- More than 500 new 1, 2, 3 and 4 bedroom apartments, maisonettes and houses
- Since summer 2020, LBH has been working closely with residents living on the estate to understand their views on the redevelopment of Hayes Town Centre Estate.

④ Avondale Drive Estate

- 240 homes across 3 phases of development. Currently under construction.

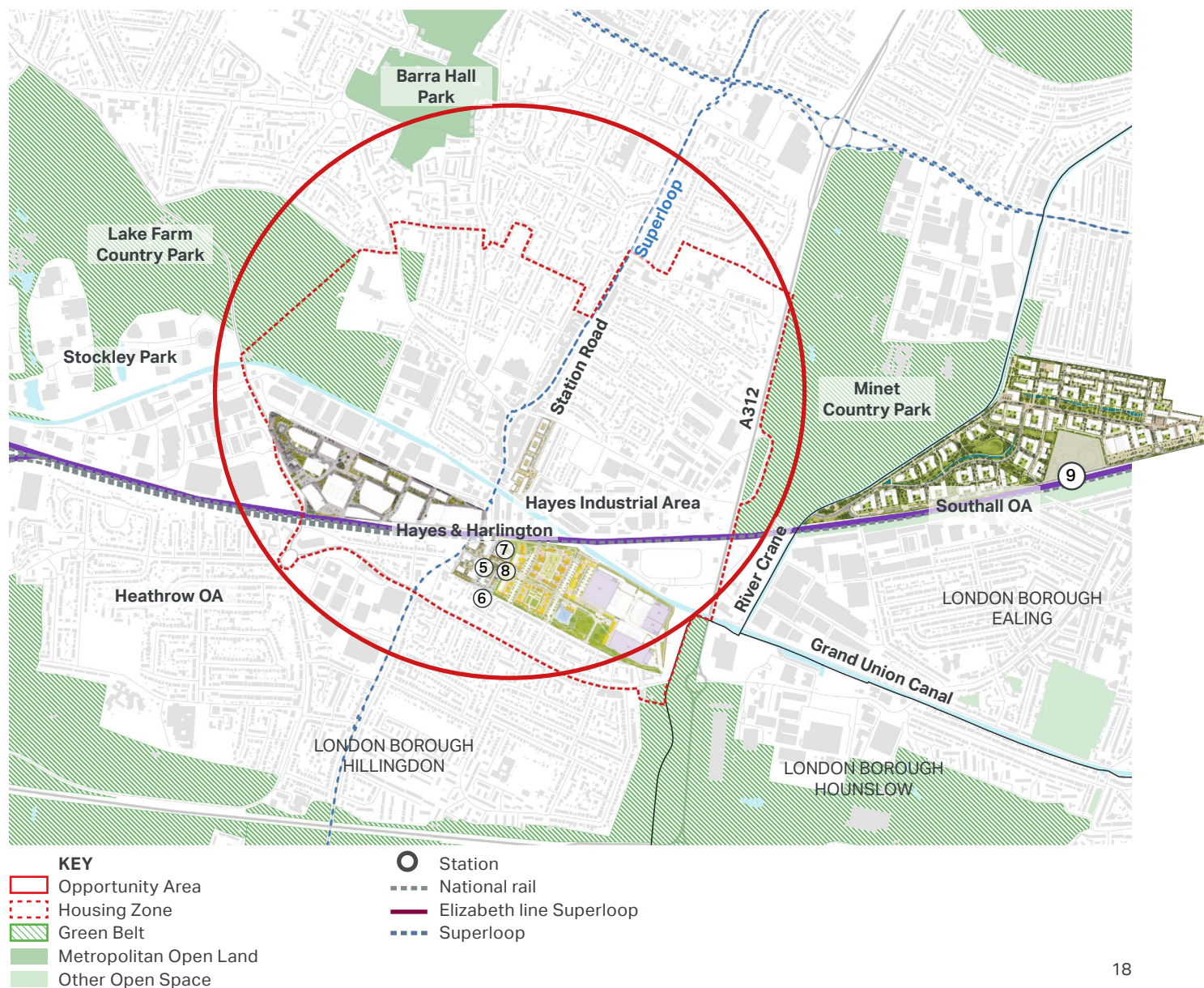


KEY	
	Opportunity Area
	Housing Zone
	Green Belt
	Metropolitan Open Land
	Other Open Space
	Station
	National rail
	Elizabeth line Superloop
	Superloop

Hayes

Site allocations: Local Plan 2020

- ⑤ 233 - 236 Nestles Avenue (Planning Consented);
- ⑥ 9 Nestles Avenue (Planning Consented)
- ⑦ 3 Viveash Close (Planning Consented)
- ⑧ Squirrels Estate (Planning consented 2023)
- ⑨ The Green Quarter (Southall); some phases completed (in total more than 3,600 new homes).







Hayes

Development activity 2021

- ① Nestle site under construction.



Source: vu.city

KEY	
	Consented
	Under construction
	Completed
	Housing zone

Hayes

Development activity 2024

- ① Approvals around the corridor emerge.
- ② Nestle site completed and some plots under construction.



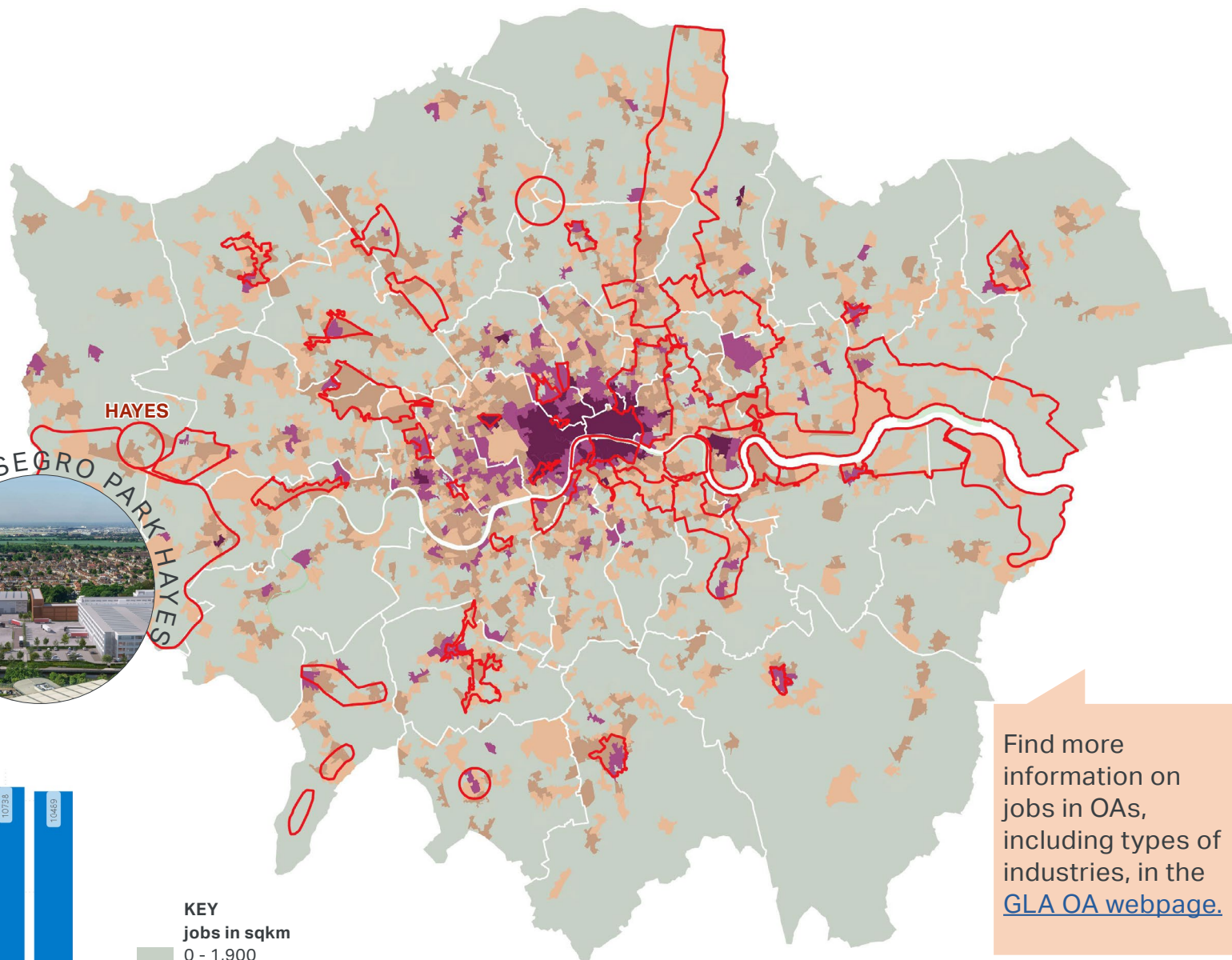
Source: vu.city

KEY

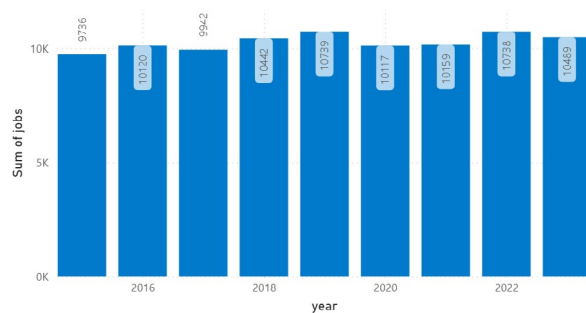
- Consented
- Under construction
- Completed
- Housing zone

Hayes Jobs

- Low to average jobs density partially justified by the type of land uses (industrial; big footprints - storage etc).
- In 2023 there were more than 10,500 jobs in the OA, accounting for 6 per cent of the total jobs in the Borough.



Jobs by year in the OA



Source: Census, Business Register

KEY
jobs in sqkm

- 0 - 1,900
- 1,900 - 4,000
- 4,000 - 13,000
- 13,000 - 60,000
- above 60,000

Find more information on jobs in OAs, including types of industries, in the [GLA OA webpage](#).

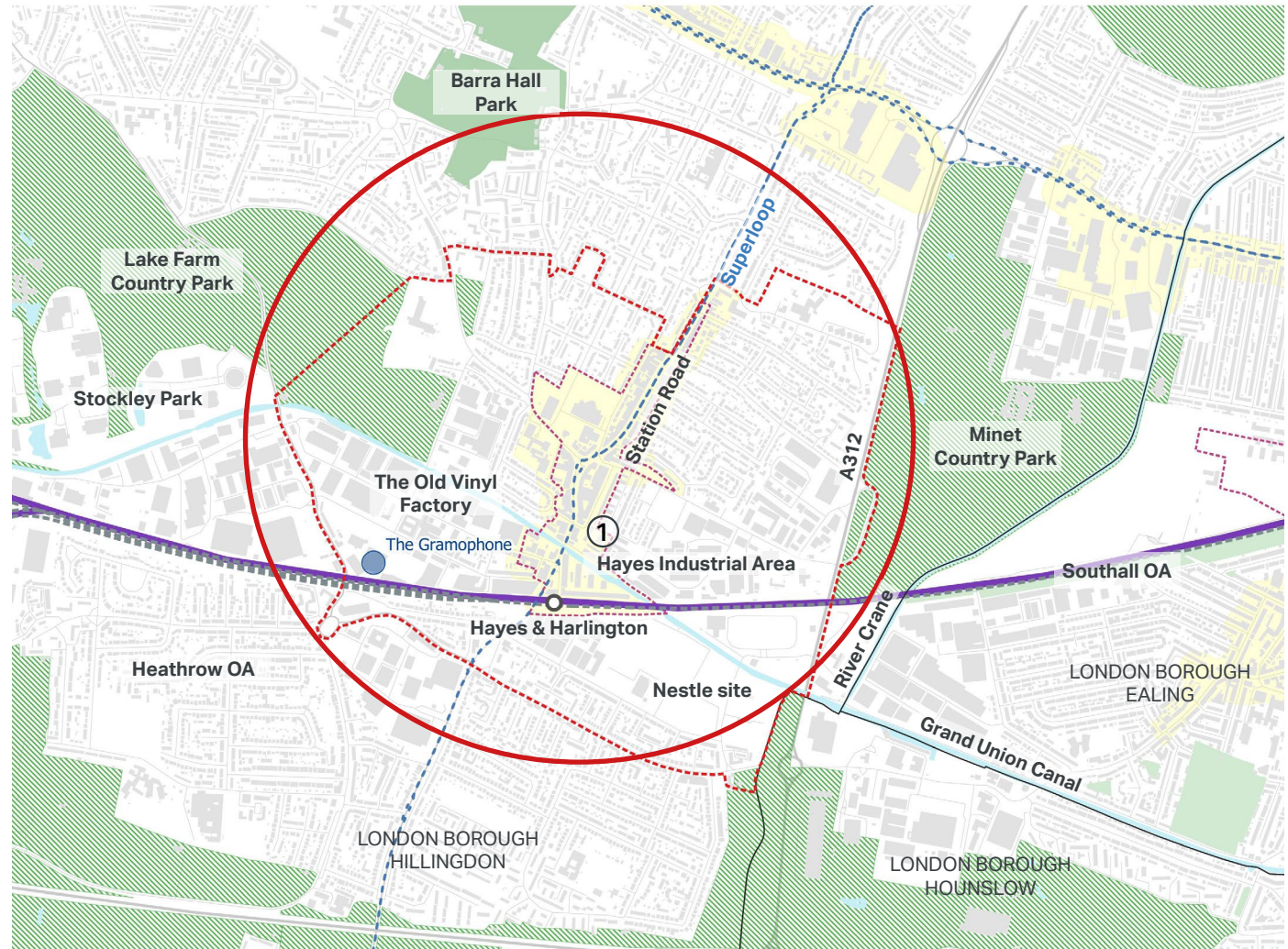
Hayes

Town Centres and High Streets

- Role of Hayes Town Centre in the wider corridor.
- Connections with Southall - where new neighbourhoods are emerging (The Green Quarter) around the station (more than 3,600 new homes) .



Proposals for Hayes Town Centre Estate



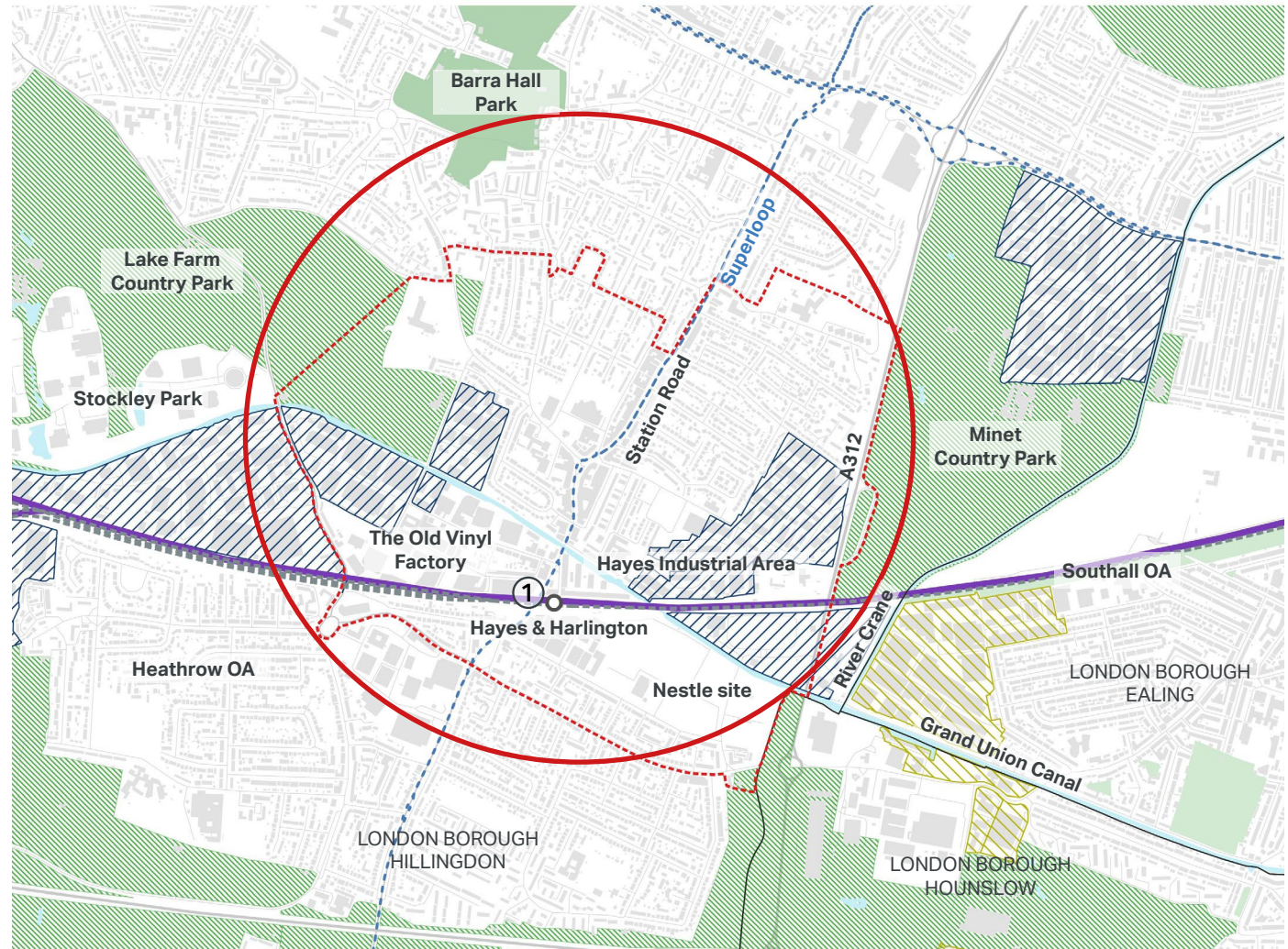
- KEY**
- Town Centre
 - High street
 - Good Growth Funded project (Round 1 to 3)



Hayes

Protected Industrial land

- A large SIL with a mix of warehousing, trading estates, vehicle storage/depots, material storage and heavier industrial uses.
- At the eastern end, there is a growing centre within walking distance to Hayes station with new residential and commercial developments coming forward.
- Capitalising on the area's strategic connectivity, there are also some newer, larger-scale distribution units.



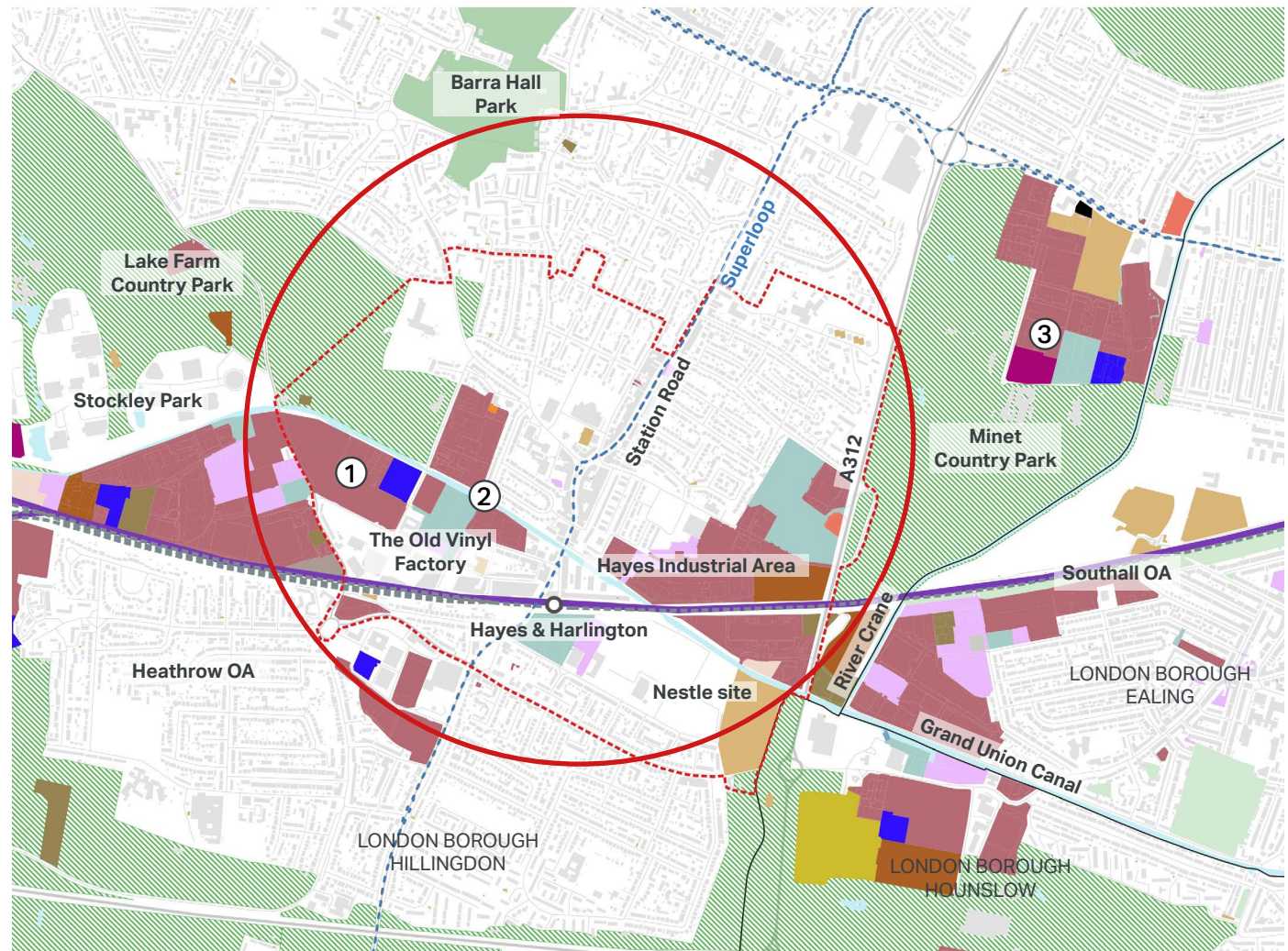
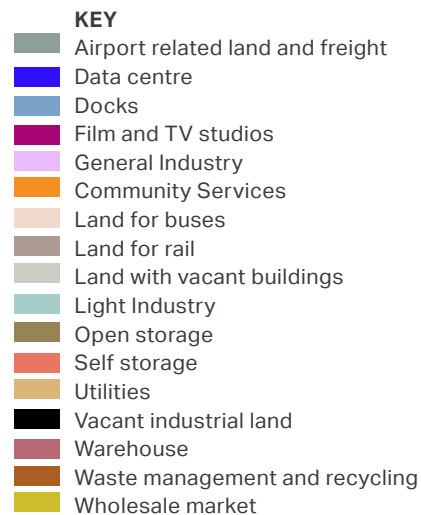
Source: London Industrial Supply Study

KEY
 SIL
 LSIS

Hayes

Industrial land: Types of industry

- ① Data centre typologies are evident on the map.
- ② Closer to the station light industrial typologies.
- ③ Film and TV studios just to the north of Minet Park.



Source: London Industrial Supply Study

Hayes

Employment Land and Capacity Study (2023)

- As part of their local plan refresh LB Hillingdon commissioned Avison Young to conduct an Employment and Land Supply Study. The study shows that:
- Hayes Industrial Area is well utilised, but some areas could be better organised or utilised to unlock employment floorspace.
- There are also a small number of older and vacant industrial units that present opportunities for redevelopment.
- There have already been large redevelopment schemes across the area (e.g. Prologis Park Heathrow) demonstrating high levels of market appetite to invest in the area.

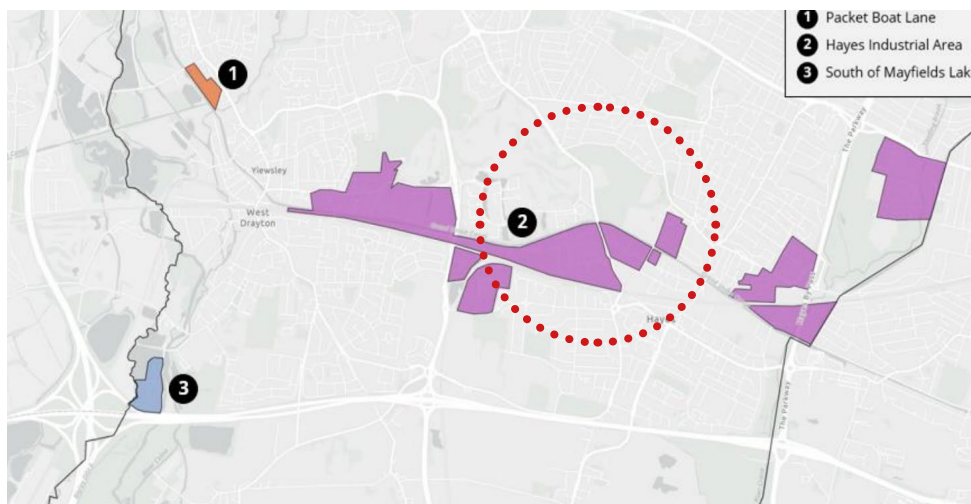


Figure 28: Cluster B: Hayes Sites
Source: LBH and Avison Young, 2023

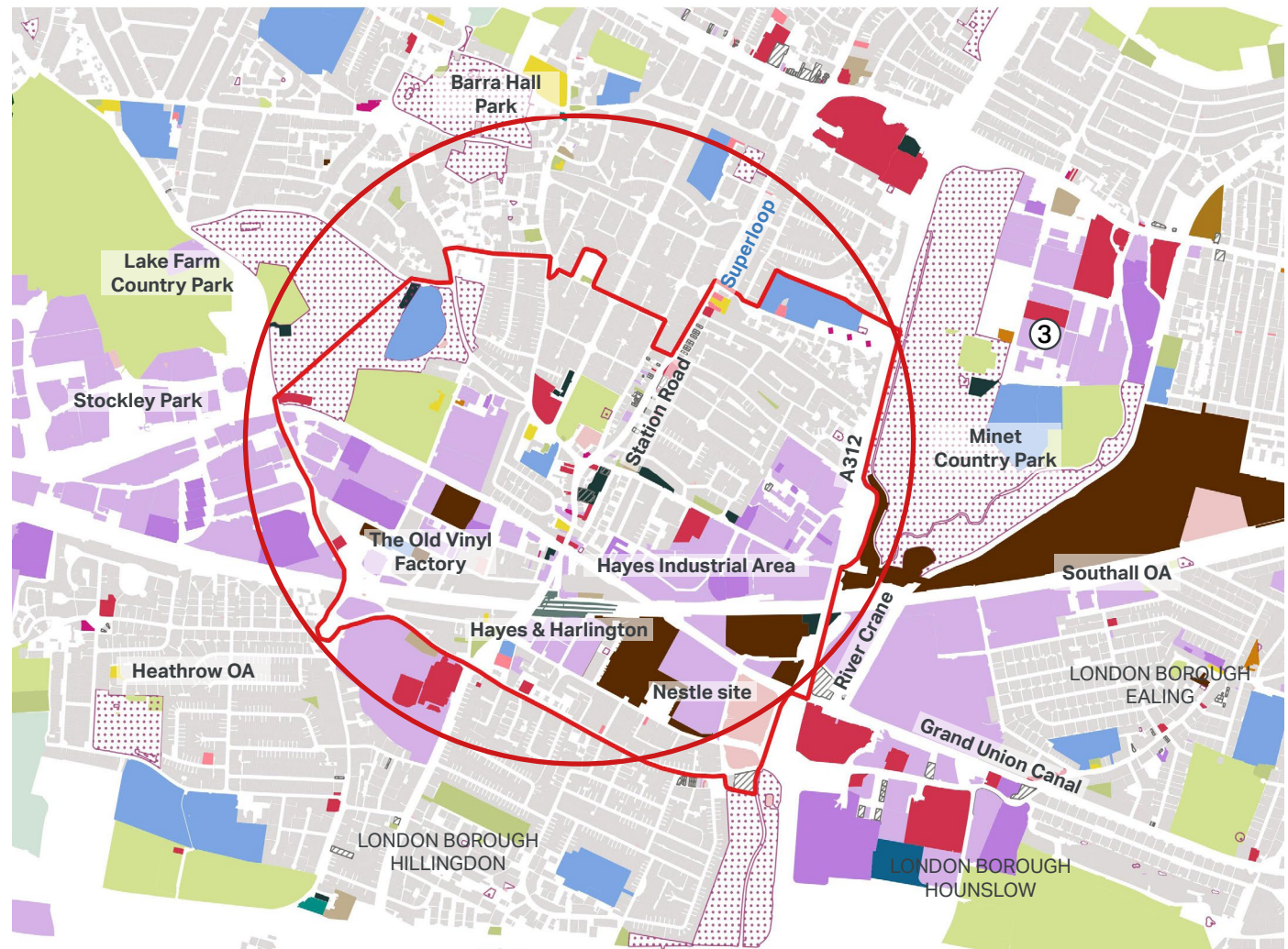
Source: <https://www.hillingdon.gov.uk/local-plan>



Figure 30: Hillingdon Site Based Opportunities
Source: Maccreanor Lavington, 2023

Hayes

Land uses



Source: OSNGB, City Intelligence Unit (GLA)

Hayes

Moving forward

Homes delivery

- Development sites are coming forward, and the OA is delivering at a higher rate than its indicative delivery rate as per London Plan 2021.
- Development coming forward so far shows that large sites in single ownership can be the catalyst for wider change and regeneration.
- Positive impact of the dedicated DIFS. Such studies can guide development and offer greater detail on infrastructure needs for high growth areas.

A co-ordinated approach to industrial land (Heathrow corridor)

- There is appetite for industrial uses and opportunities for intensified employment spaces.

Connecting places

- Potential growth and regeneration opportunities

in the Town Centre, and GLA support to ensure that individual developments are well - integrated with the High Street, and create a coherent place.

'Soft' infrastructure

- Social infrastructure delivery is critical for the OA.
- There is opportunity to help bring forward social infrastructure and to fill empty properties, i.e. joint marketing of space, landowner forums, town centre management.

Energy

- The OA sits within the West London area currently affected by electricity capacity constraints. There is scope for early engagement with the electrical distribution and transmission networks to better align investment programmes with the development timelines.

Proposition

- OA to be moved from 'Ready to grow' to 'Underway'.
- Opportunity for boundary adoption through new local plan.
- Social infrastructure needs to be supported to create inclusive, successful places.
- Emerging Hayes town centre/ public realm strategy with GLA support:
 - Public realm and safe walking/ cycling links across land uses and to the Elizabeth Line station are key for a sustainable place.
 - Interfaces between new developments and existing high streets and town centre are crucial.



Nestle site Hayes