

Opportunity Area Portrait

Croydon



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.

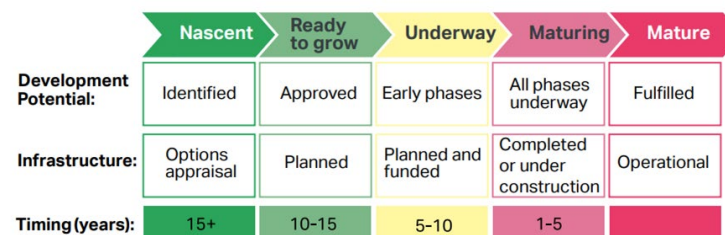
OA boundaries

- 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

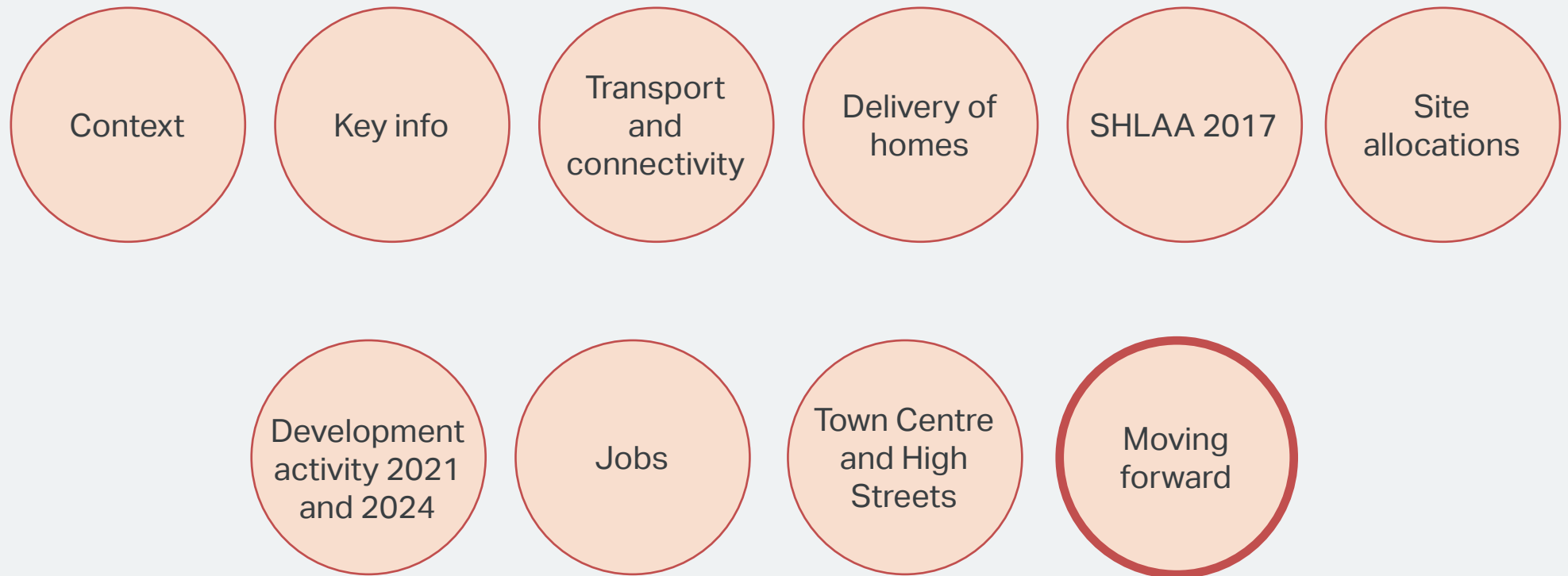


Additional resources

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

Introduction

Contents



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

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Context

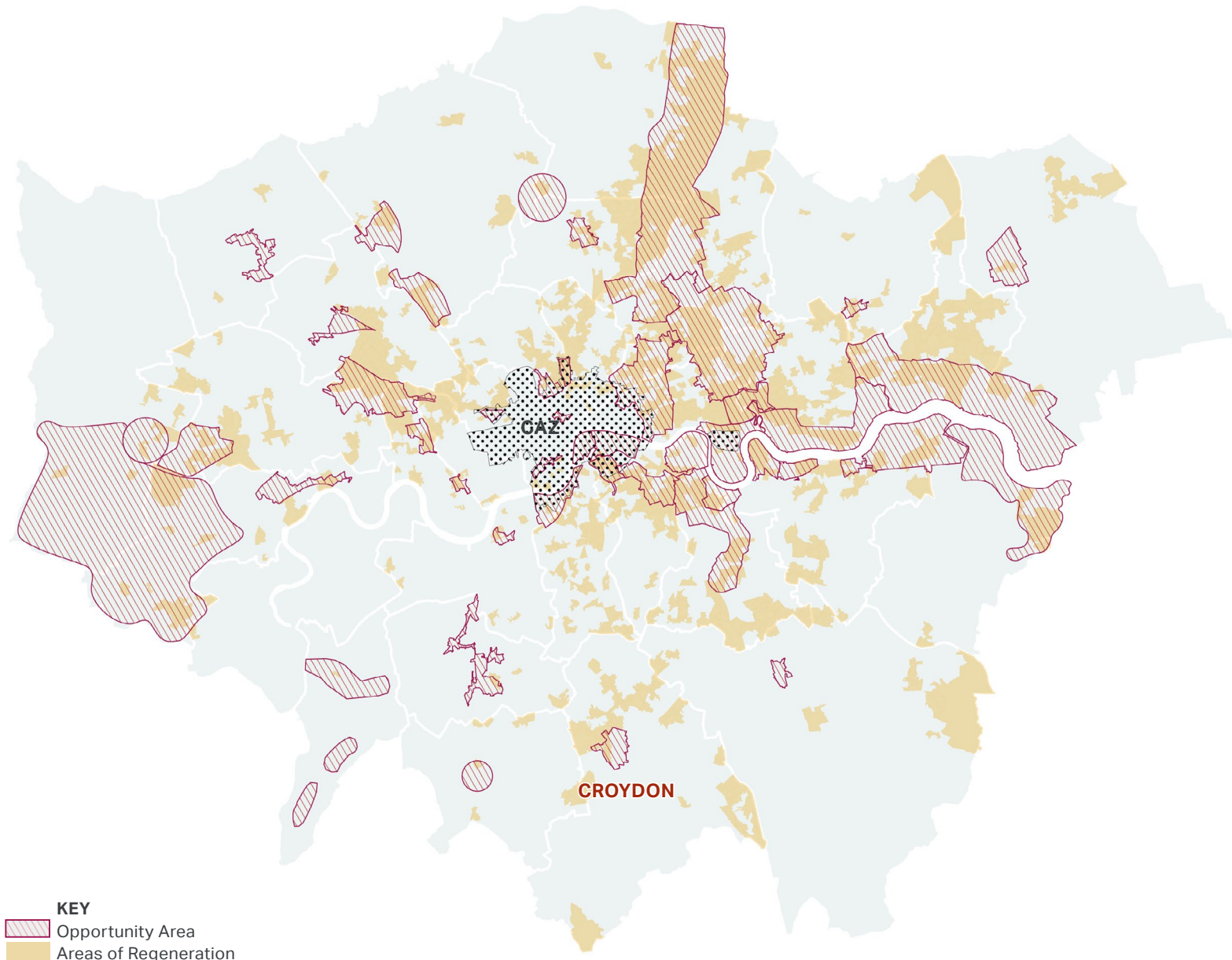
OAs in the CAZ

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

Not relevant for this OA, as it sits in Outer London, but sets the wider context.

Areas of Regeneration

The OA overlaps with areas of regeneration.

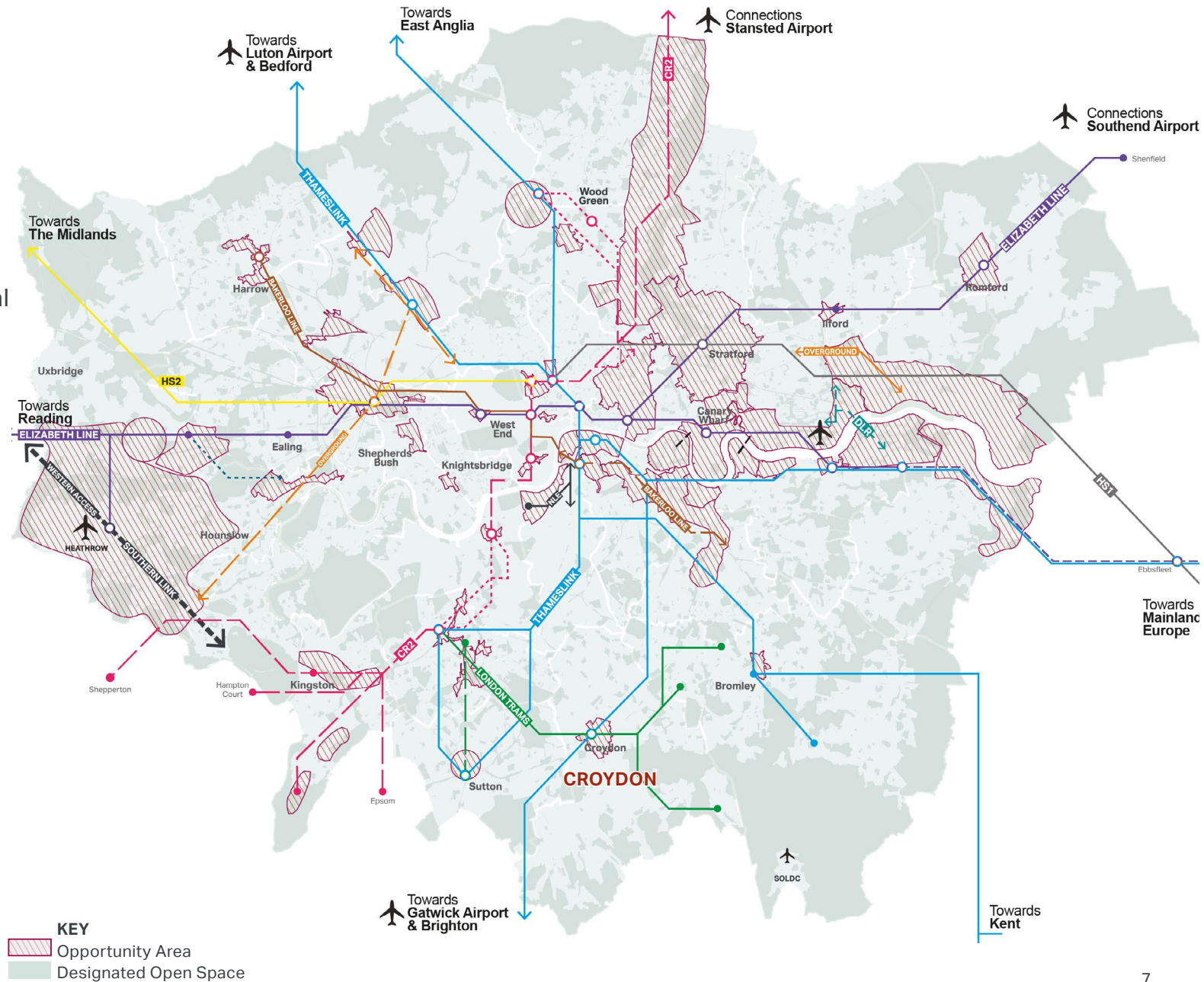


Source: Areas of Regeneration as per London Plan 2021

Croydon Context

Transport and Growth Corridors

- Croydon OA is served by the TfL London Trams network, connecting the OA to Wimbledon, Beckenham Junction, New Addington and numerous stops in-between.
- The OA is also served by National Rail services, the London Overground to West Croydon, and the Thameslink service that connects the OA towards Gatwick Airport, Brighton and Kent in the south, Central London as well as towards Luton Airport, Bedford and East Anglia in the north.



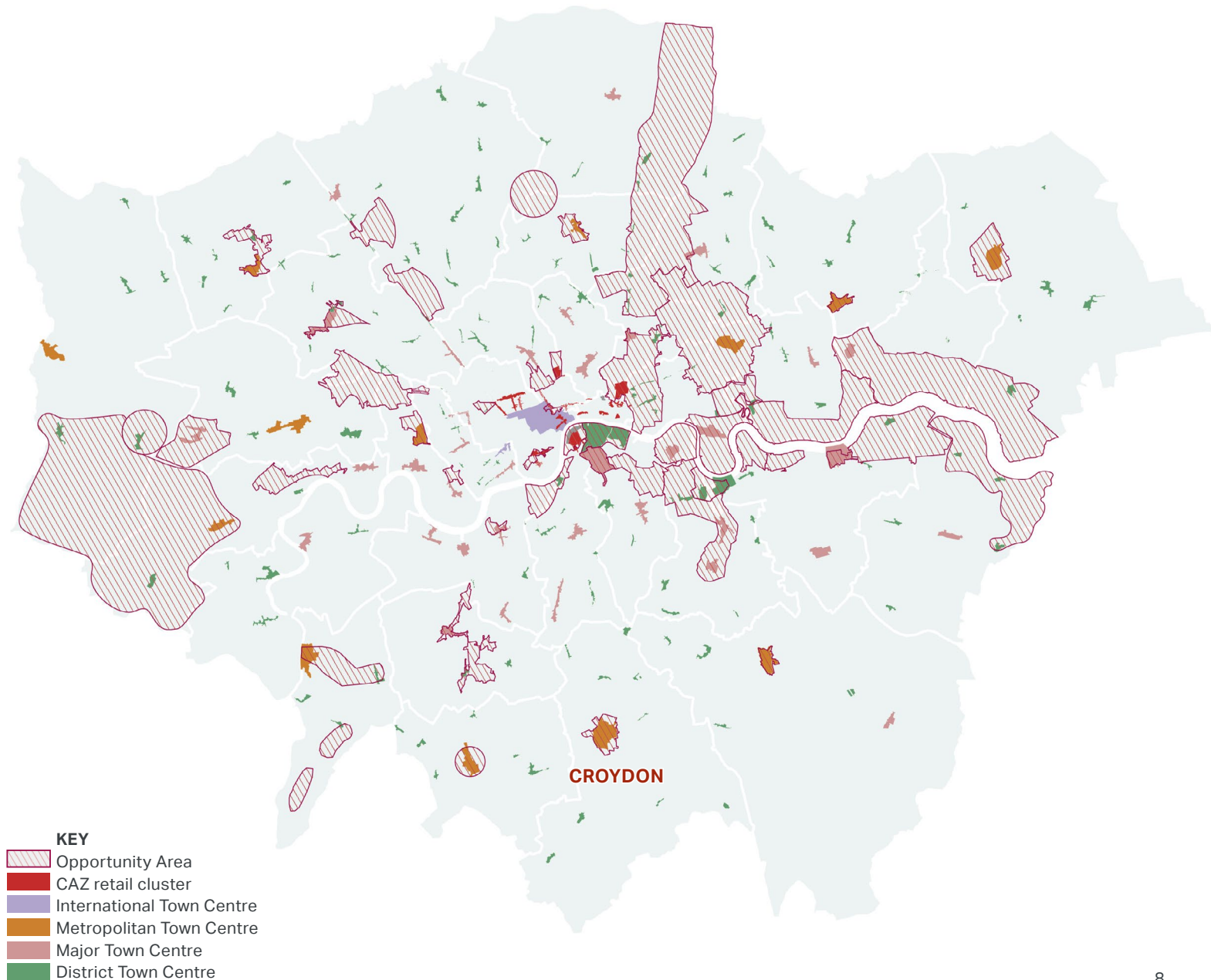
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Context

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)

Croydon Metropolitan Town Centre sits within the OA.



Source: [Planning Data Map](#)

Croydon

Key info

London Plan Designation Year

2004 2008 2011 2016 2021

Borough

London Borough Croydon

Area

Tottenham
Court Road
19 ha

Croydon
194 ha

Lee Valley
3,926 ha

OA specific plans

Croydon OAPF (2013)
Strategic vision refresh underway

Local Plan status

In progress (Regulation 19)

Growth Corridor

Trams Triangle

Housing Delivery Test 2023

None

OA status (LP 2021)

Nascent

Ready to
Grow

Underway

Maturing

Mature



London Plan 2021 capacities by 2041



Source: Google Earth

KEY

Opportunity Area

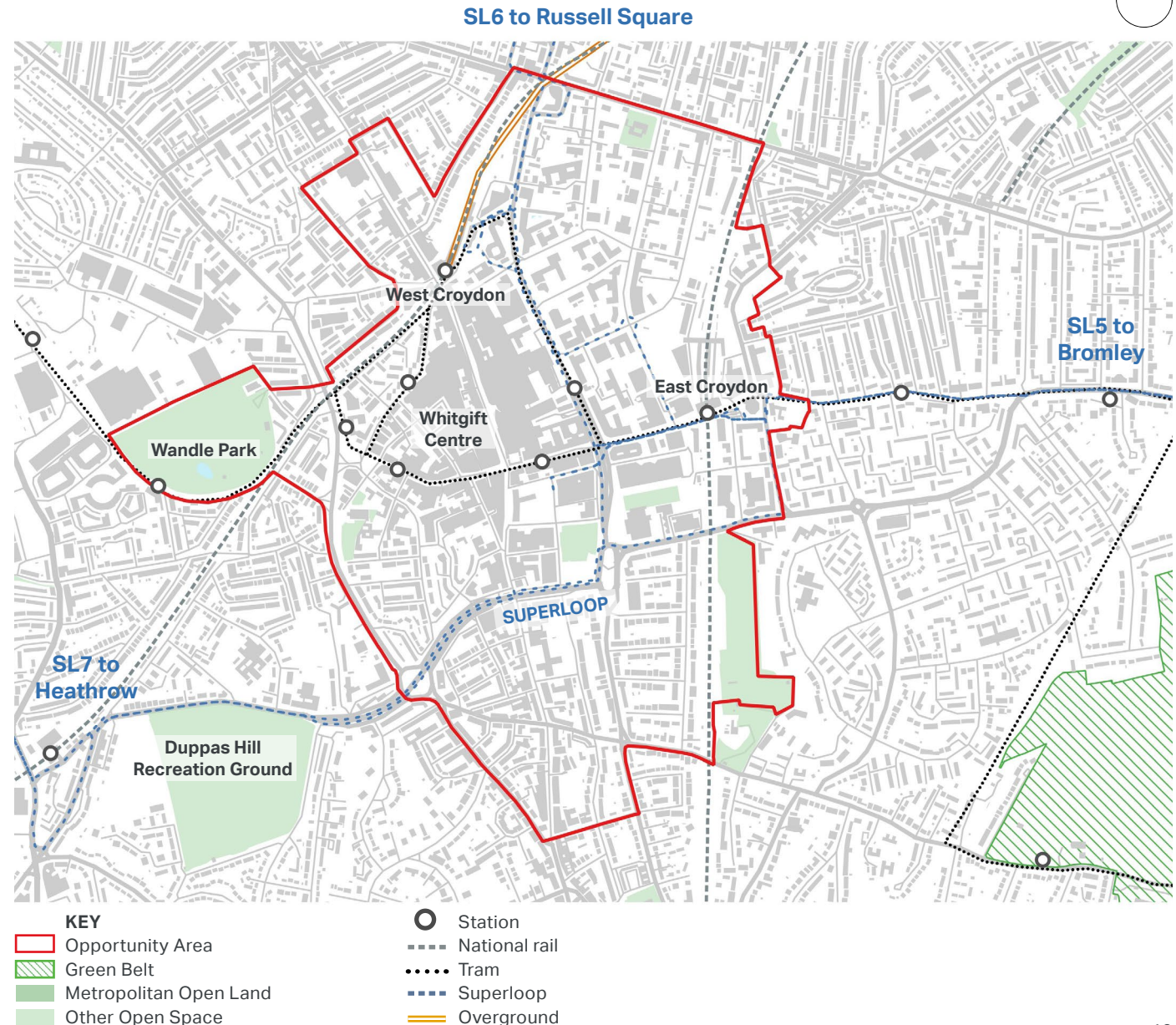
*Note that the LESD (2021) increased the capacity to 26,800 new jobs

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Transport and connectivity

Transport

- Croydon is a well - connected OA (tram, national rail).
- Three superloop routes: SL5 (Bromley to Croydon), SL7 (Croydon to Heathrow Airport), SL6 (Russell Square to Croydon)
- TfL identified that transport may be holding development back in some sites.

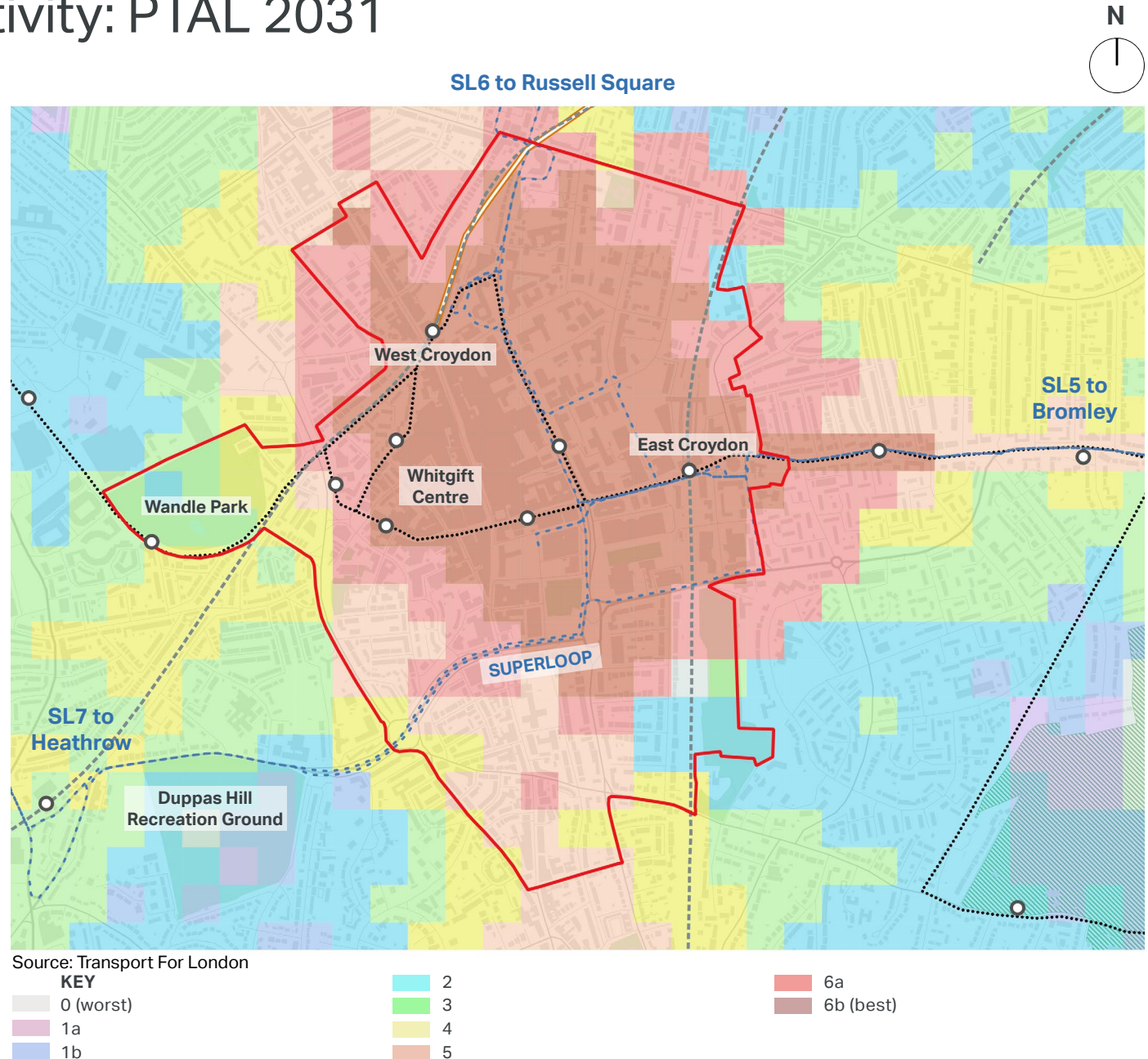


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Transport and connectivity: PTAL 2031

Transport

- Croydon is a well connected OA (tram, national rail and superloop) with a forecast PTAL of 5 to 6b which is the best rating.



Croydon

Delivery of homes

Delivery pre-2019

Completions since designation against capacity

LP 2004	2,000
LP 2008	2,700
LP 2016	7,300
Completed	5,609

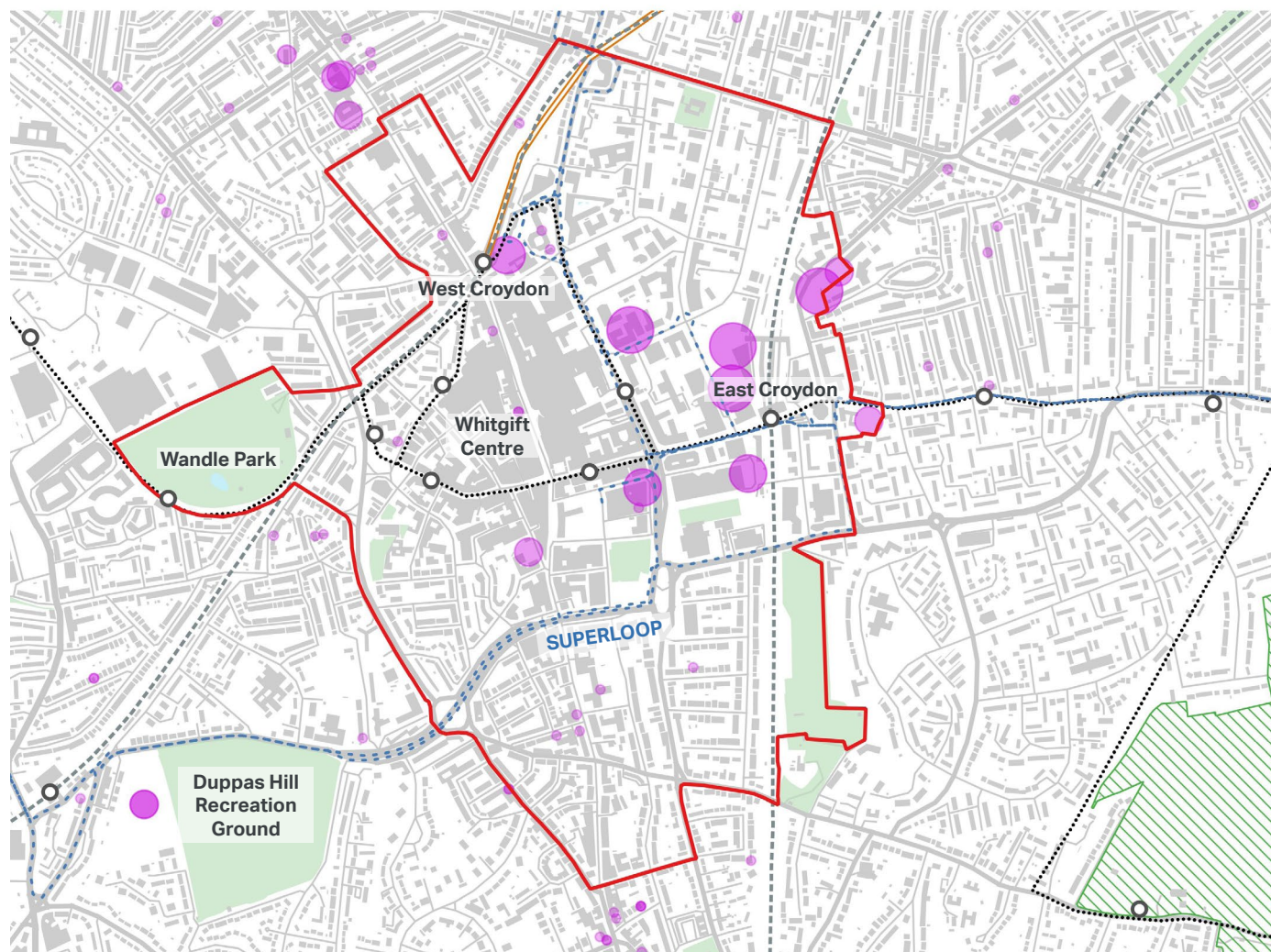
The OA was designated in the London Plan 2004 with an indicative capacity of 2,000. Since designation and until 2019, more than 5,600 homes have been completed in Croydon.

Delivery post - 2019 (London Plan 2021)

Progress against 22yr, 10 yr capacity

22 yr	14,500
10 yr	9,124
Completed	3,711
Pipeline	2,651

The OA is delivering an average of 742 homes/ year. The London Plan indicative capacity by year is 659.



KEY
 Opportunity Area
 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](#)

Croydon

SHLAA 2017

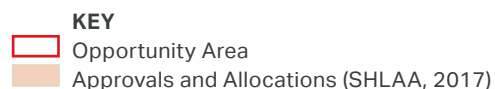
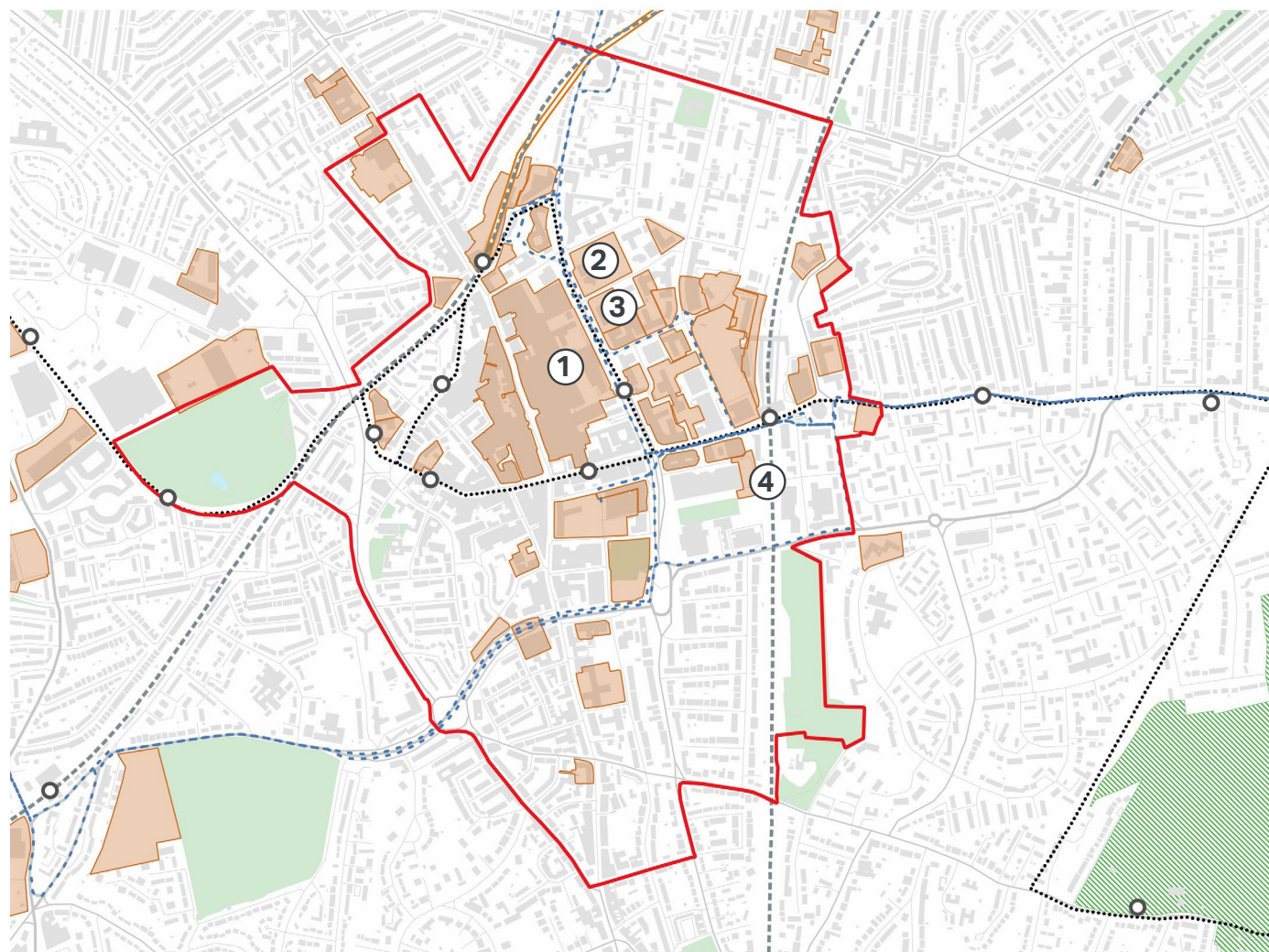
① Westfield Whitgift Centre:

- The application gained full permission in 2018 (967 homes).
- Planning permission lapsed in 2021.
- Recent information from [Molior](#) database suggests that developers Unibail-Rodamco-Westfield (URW) bought Hammerson's 50% stake in the Croydon Limited Partnership JV.
- URW submitted a [masterplan framework](#) ahead of a planning application which was endorsed by Croydon Council in February 2025.
- The masterplan will include new homes, shops, cultural venues, green and public spaces.

② Lunar House: 904 homes. Application refused in 2015.

③ Apollo House: 333 homes. Application refused in 2015.

④ College Green/ Fairfield Homes: 420 homes. Application withdrawn in 2022.



Croydon

SHLAA 2017: Approvals and allocations

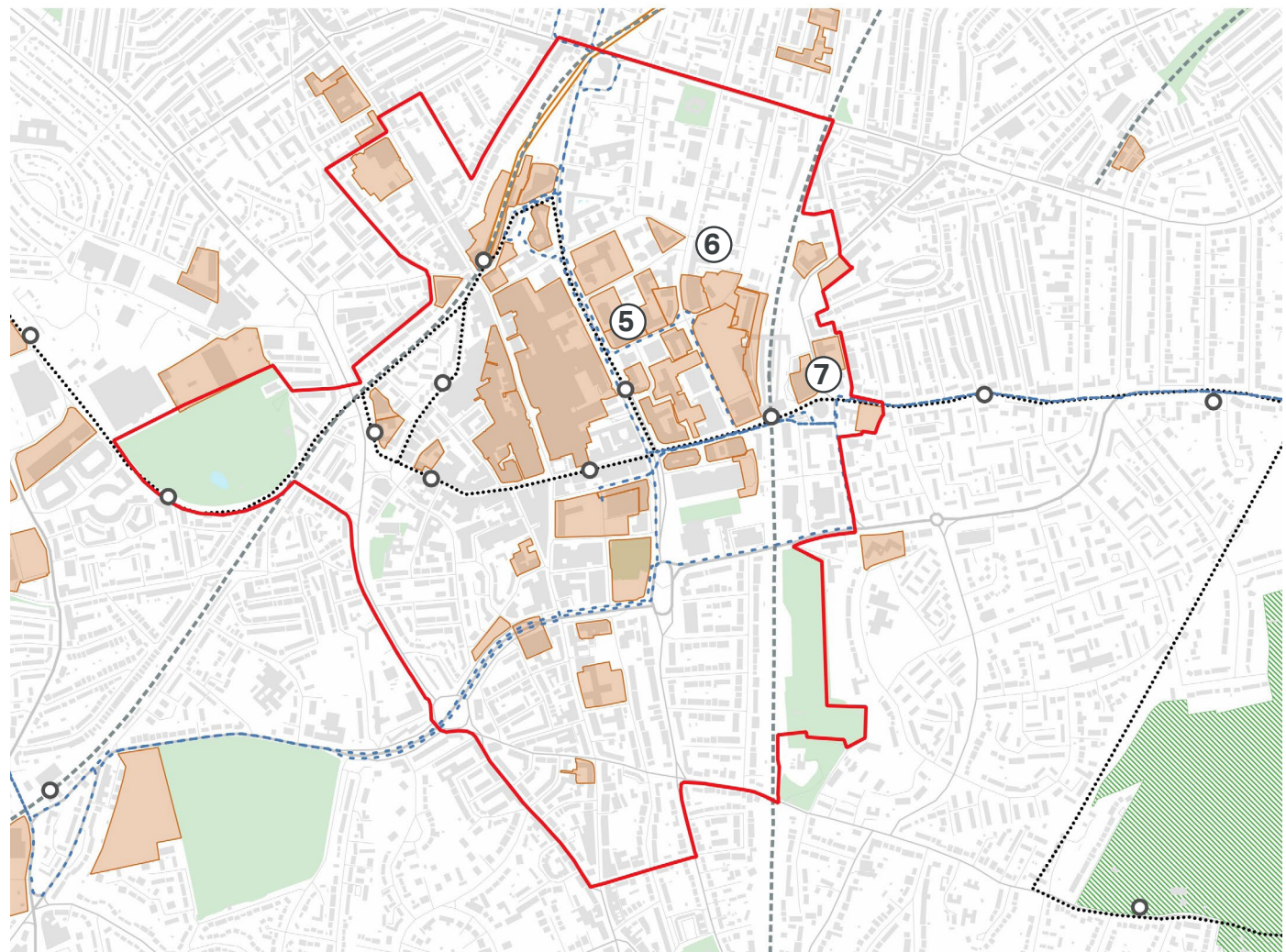
⑤ One Landsdowne Road:

- Mixed use development comprising of office, 783 residential units, and retail uses.
- Site cleared but not under construction. New superseding application submitted in 2023.



⑥ Ruskin Square: 178 homes, a cleared site with outline permission (RO1), 150 homes (RO2).

⑦ Addiscombe Square (Croydon Delivery Office): 201 homes approved in 2013. Network Rail bought the site in 2019.



KEY
[Red outline] Opportunity Area
[Orange shaded] Approvals and Allocations (SHLAA, 2017)

Croydon

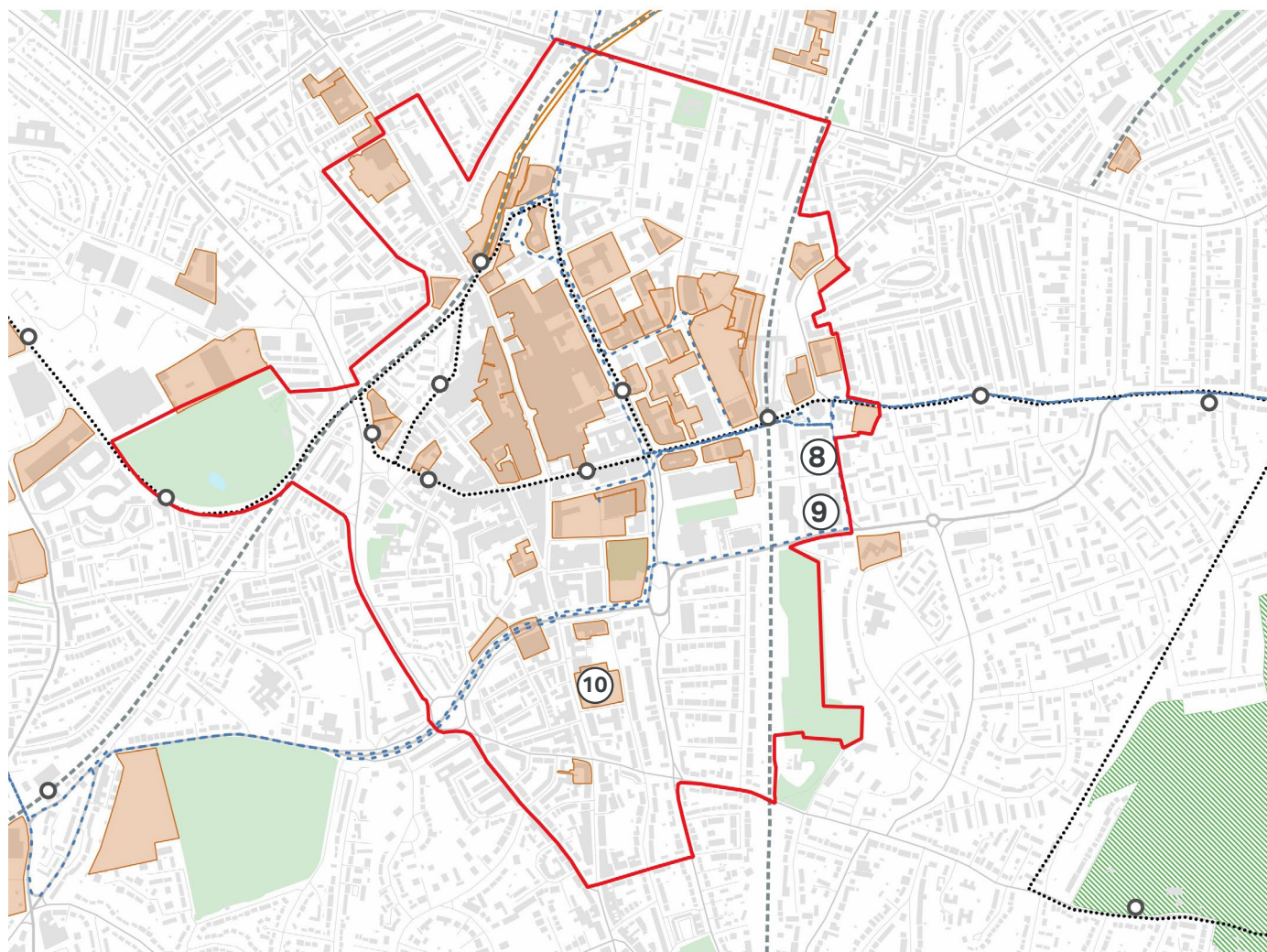
SHLAA 2017: Approvals and allocations

- ⑧ **Citylink House:** Gained full planning permission at appeal (2023). There will be 582 units: 498 co-living units, 84 affordable C3 units.



- ⑨ **Botanical House (Croydon Park Hotel):** Permission granted in 2024. There will be 447 residential units.

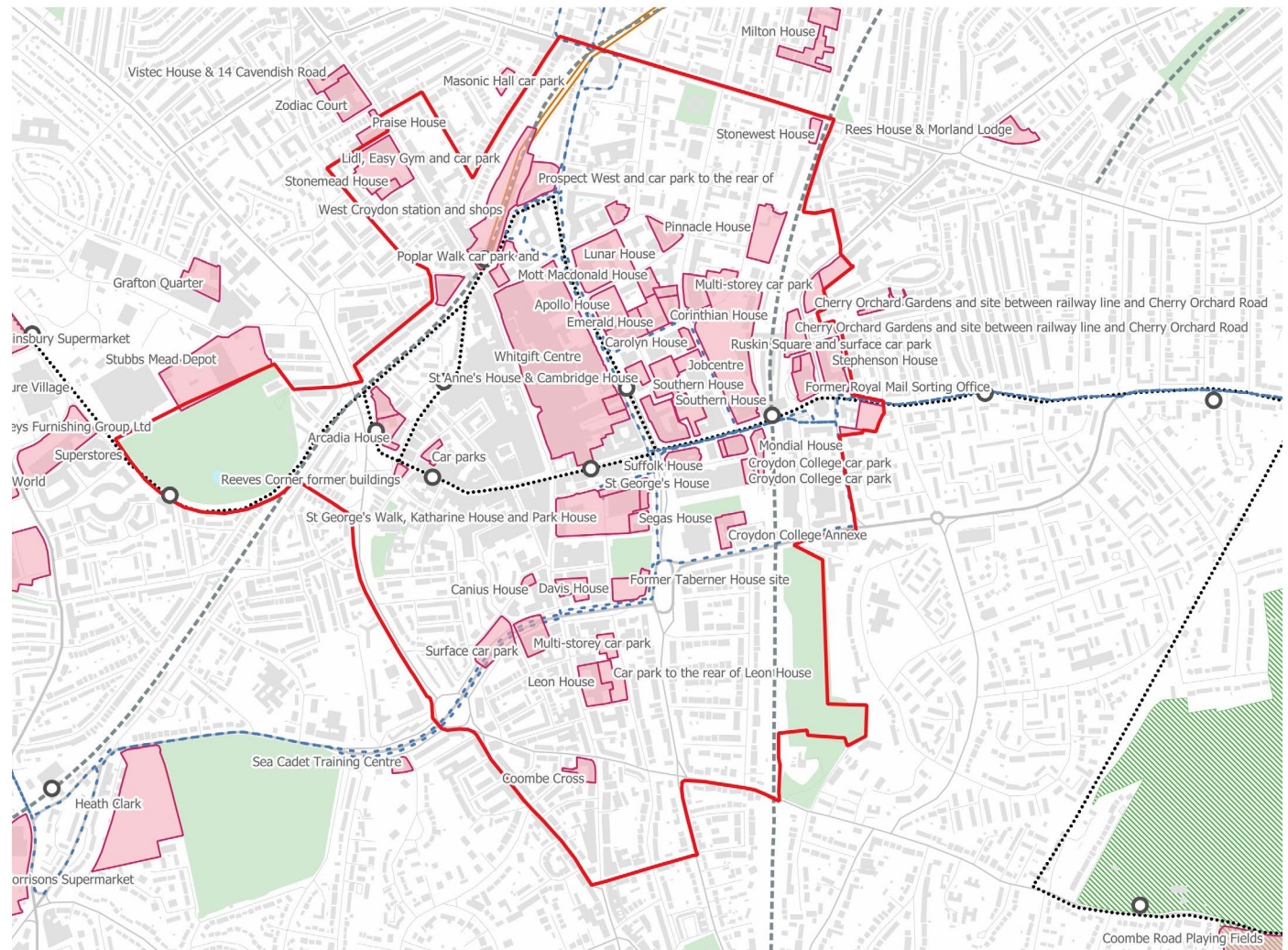
- ⑩ **Leon Quarter (Adj. Leon House):** Permission gained in 2021. 357 residential units.



KEY
[Red outline] Opportunity Area
[Orange shaded] Approvals and Allocations (SHLAA, 2017)

Croydon

Site allocations: Croydon Local Plan 2018



- KEY**
- Opportunity Area
 - Site allocations - LB Croydon

Croydon

Development activity 2021

- OA is shown in dark orange shadow.
- In 2021, Ten Degrees (546 homes) modular housing scheme was completed.



Source: vu.city

KEY
Yellow: Consented
Blue: Under construction
Grey: Completed




Croydon

Development activity 2024

- OA is shown in dark orange shadow.
- Many developments are now completed.
- Consented developments emerging to the east of the OA.
- No progress in major strategic sites at the heart of the town centre.



Source: vu.city

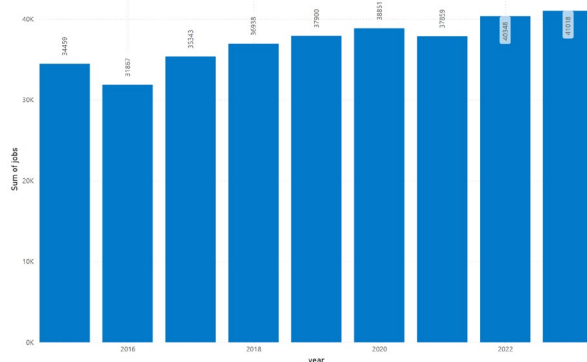
KEY	
	Consented
	Under construction
	Completed

Croydon

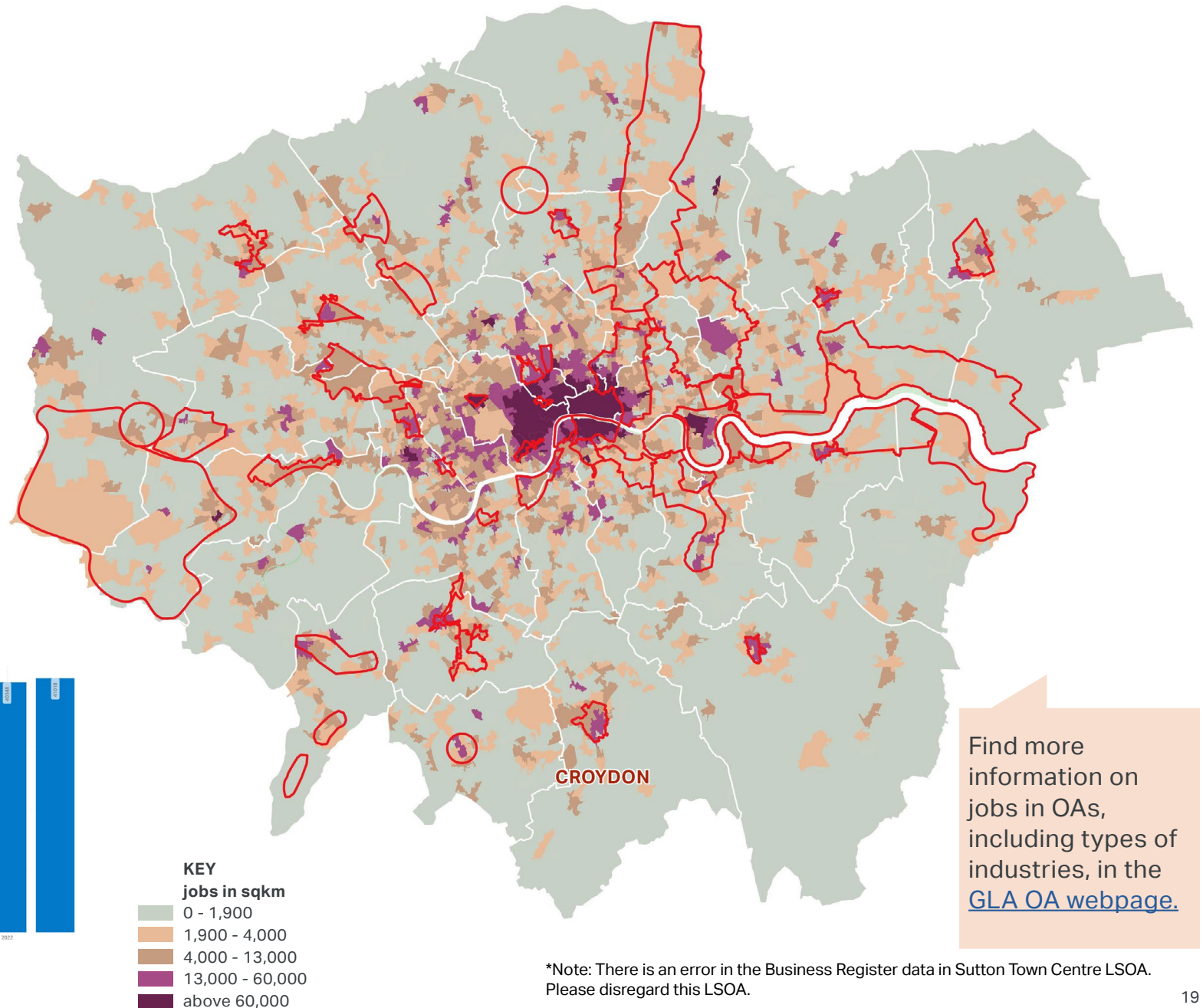
Jobs

- High density of jobs in Croydon, showing a hotspot outside of CAZ.
- Positive trends in jobs since 2019.
- There were 126,000 jobs in LB Croydon in 2023.
- 33 percent of these jobs were located in the OA.

Jobs by year in the OA



Source: Census, Business Register



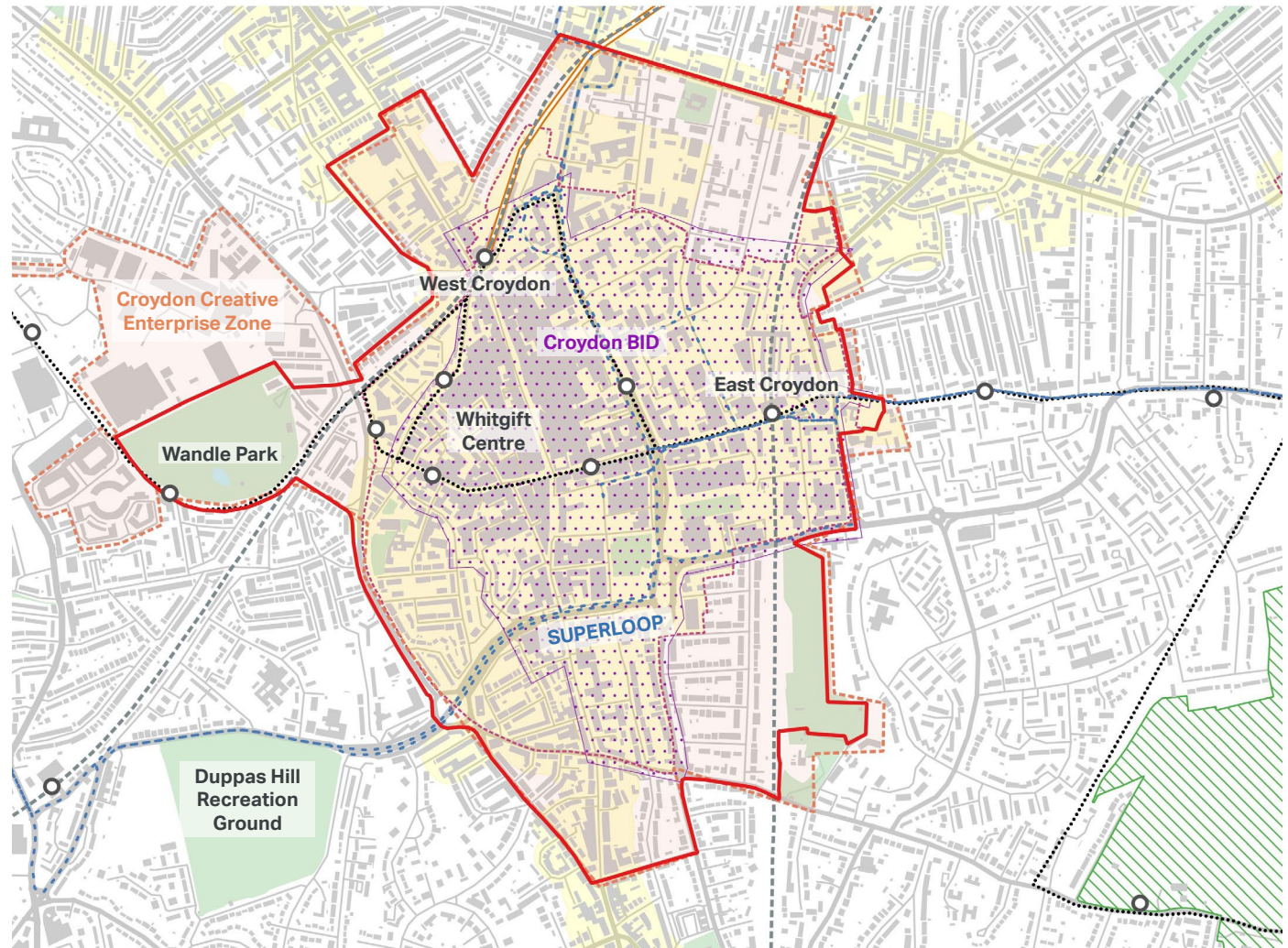
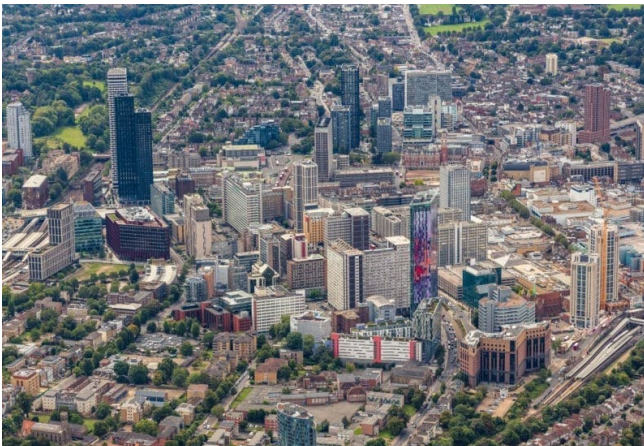
Find more information on jobs in OAs, including types of industries, in the [GLA OA webpage](#).

*Note: There is an error in the Business Register data in Sutton Town Centre LSOA. Please disregard this LSOA.

Croydon

Town Centres and High Streets

- £5M planned investment in Croydon town centre, 2022 - 2027 (Source: Croydon BID).



KEY

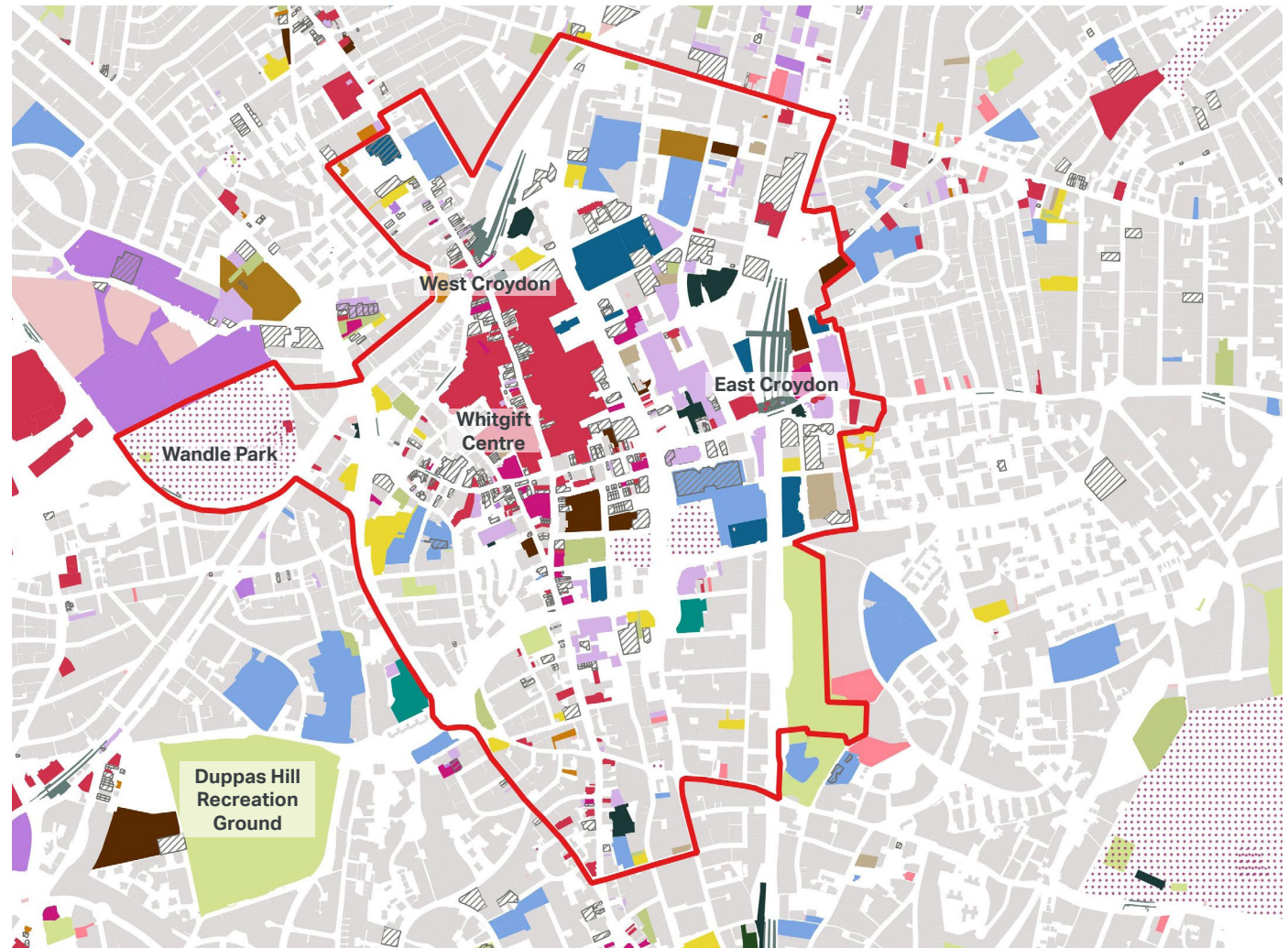
- Town Centre
- High street
- Business Improvement District (BID)

Croydon

Land uses



- KEY**
- Opportunity Area
 - Attraction or Activity
 - Commercial Activity: Animal Services
 - Commercial Activity: Distribution or Storage
 - Commercial Activity: Industry/ Business site
 - Commercial Activity: Other
 - Commercial Activity: Retail
 - Community Services: Funeralary
 - Community Services: Emergency Services
 - Community Services: Religious Worship
 - Construction
 - Defence
 - Education & Culture
 - Government Services
 - Medical or Health Care
 - Mixed Use
 - Residential Accommodation
 - Sports Attraction or Facility
 - Temporary or Holiday Accommodation
 - Transport: Rail
 - Transport: Road, Track or Path
 - Unknown Use
 - Utility or Environmental Protection



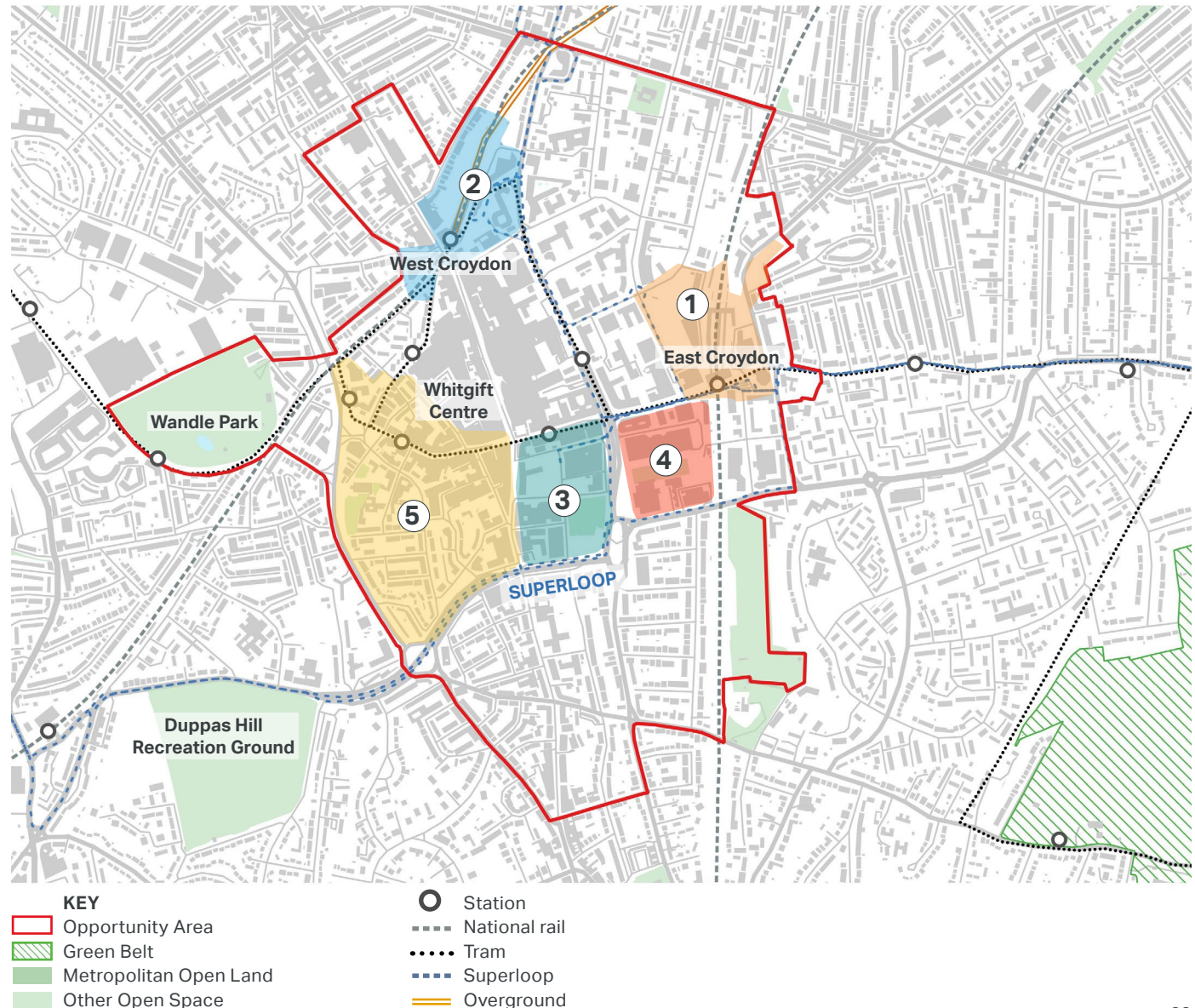
Source: OSNGB, City Intelligence Unit (GLA)

Croydon

Place strategies: Masterplans

Croydon Council has developed a set of masterplans for the Croydon Opportunity Area:

- ① East Croydon (Interim Planning Guidance, 2011)
- ② West Croydon (Interim Planning Guidance, 2011)
- ③ Fairfield (Interim Planning Guidance, 2012)
- ④ Mid-Croydon (Interim Planning Guidance, 2012)
- ⑤ Old Town (Supplementary Planning Document, 2014)



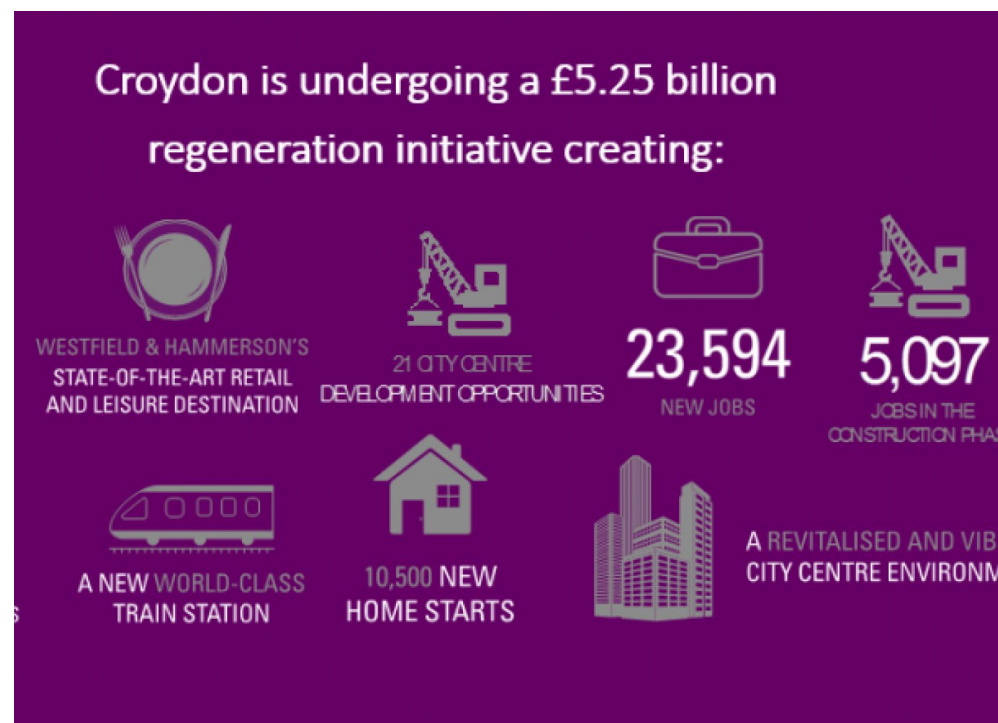
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Place strategies: Croydon Town Centre Regeneration Strategy

The strategy outlines what steps need to be taken to support the Council's approach to recovery and renewal of Croydon Town Centre and how to unlock its potential over the next 15 years. Like many other town centres and high streets across the UK, spaces and activities in the town centre have been experiencing major changes driven how people shop, work, and use their town centres; and the impact of the climate emergency and COVID-19 pandemic.

Building on the town centre's existing strengths, the strategy recognises it is critical that the right investment in the right places in the coming years puts Croydon Town Centre on a course to sustainable, inclusive economic growth over the long-term. The outcomes of this change will be:

- ① To instigate long term change, reflecting and enhancing Croydon's rich heritage and vibrant culture by celebrating and nurturing what already makes the borough special.
- ② Making Croydon Town Centre adaptable, innovative, and dynamic by establishing as a hub for creation, production, and activity; enhancing existing spaces and creating exciting new places for locals and visitors to shop, relax, socialise, and work.
- ③ Ensuring Croydon town centre is welcoming, accessible, and safe so everyone will feel confident and comfortable moving through and spending time in the town centre.
- ④ Supporting its residents and visitors in living healthy, happy lives where the creation of healthy streets and green spaces will ensure sustainable growth, climate resilience, and a good quality of life for everyone.



Source: [Croydon Council](#)

Croydon

Place strategies: North End Quarter Fringes

North End Quarter Fringes

- Croydon is one of the 12 places that the Mayor of London's [Civic Partnership Programme \(CPP\)](#) is supporting. Through this programme, the Council is focusing on the spatial fringes of the North End Quarter; developing a Strategy that explores opportunities and partnerships to improve accessibility and connectivity to key transport nodes, revitalise historic assets, tackle impacts of high retail vacancy, mitigate low air quality and increase provision of green spaces.

01

Deliver place-led change to become a destination that we can all be proud of

Our first priority is to transform Croydon into a bustling town centre that puts the borough back on the map and reflect the pride of the community.

This needs to be delivered in a way that is true to Croydon's heritage and culture, whilst giving it the boost it needs to make it a place people want to spend time to live, work or visit.

To do this we need to consider how we give people a reason to visit Croydon in a way that combines shops, restaurants, bars and cafés alongside cultural, leisure and work spaces.

02

Create a new network of permeable public routes, streets and spaces

We want to create a new, open and safe network of routes, streets and spaces that seamlessly connect the town centre with its surrounding areas.

This will significantly enhance:

- 01: Accessibility
- 02: Safety
- 03: Connectivity

This will be achieved by providing improved walking and cycling links to bus and tram stops, rail stations, and new active travel networks.

Key routes and improvements include:

- A 24-hour public route connecting Lansdowne Road to Drummond Road via North End which connects Old Town, North End and East Croydon Station.
- Enhanced routes between Poplar Walk and a new east-west route and further routes east-west from Wellesley Road near Sydenham Road to North End.
- Potential connections between George Street, Dingwall Avenue, North End, and a new east-west route.

Key

- NEQ boundary
- Primary pedestrian/cycle route
- Primary pedestrian only route
- Secondary pedestrian/cycle route
- Secondary pedestrian only route
- Possible other pedestrian route
- Primary vehicle movement
- Secondary vehicle movement
- New or improved managed public spaces and routes
- Existing key public spaces and routes
- Primary active frontages
- Secondary active frontages
- Potential ground floor uses:
 - Predominantly commercial, leisure, community and other town centre uses at ground level
 - Predominantly mixed uses including community and other non-residential at ground level
 - Predominantly residential (led uses)
 - Private amenity

Calling Croydon

Your say on the future of the North End Quarter

UNIBAIL-RODAMCO-WESTFIELD

Masterplan Framework consultation
November 2024

What is the North End Quarter?

This is the name given by the council to the area of the town centre around North End bordered by:

- Wellesley Road to the East
- George Street to the South
- Frith and Tamworth Road to the West
- Poplar Walk to the North

The area includes the Whitgift and Centrale centres, Allders, the car parks and some office buildings.



Croydon

Moving forward

- Croydon is one of the most populous boroughs in London and its **population is expected to grow** considerably in the coming years.
- The OA is a **metropolitan town centre (one of the largest)**, with an important role in the delivery of new homes and jobs, as seen in the jobs density map (strategic office centre outside CAZ).
- Croydon is performing at 42 per cent of its 10 year homes capacity, and at 26 per cent of its 22 year capacity, with a relatively high pipeline.
- There is development activity in the town centre, but also several challenges to good growth, including **outer London land values, piecemeal development/poor public realm, and stalled major sites** (i.e. Whitgift redevelopment).
- An **integrated approach** to bring forward a number of sites and secure successful placemaking is essential.
- **The OAPF is significantly out of date** (adopted in 2013), and there is work underway for a strategic vision refresh (council-led).
- Worth noting that the part of the OA is the focus of one of the GLA - Civic Partnership Programme (CPP) exemplar projects. The focus of the project is to transform the public realm, activate underused spaces and environmental improvements.

Proposition

- OA represents a key strategic opportunity where homes and jobs can be accelerated. The recently appointed town architect will steward and guide coherence, cohesion and exemplar design quality across all town centre projects and programmes.
- Potential for the OA status to be moved from 'ready to grow' to 'underway'.



Source: We Made That