

Opportunity Area Portrait

Old Oak/Park Royal



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.

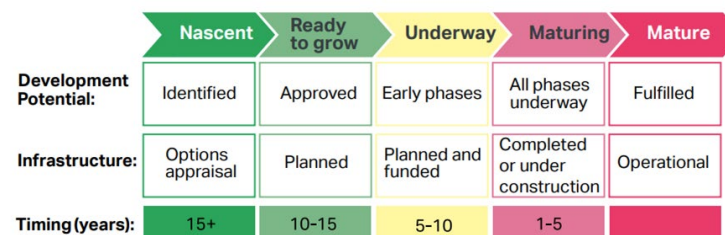
OA boundaries

- 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

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and
connectivity

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and 2024

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Town Centre
and High
Streets

Industrial
Land

Place
strategies*

Moving
forward

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

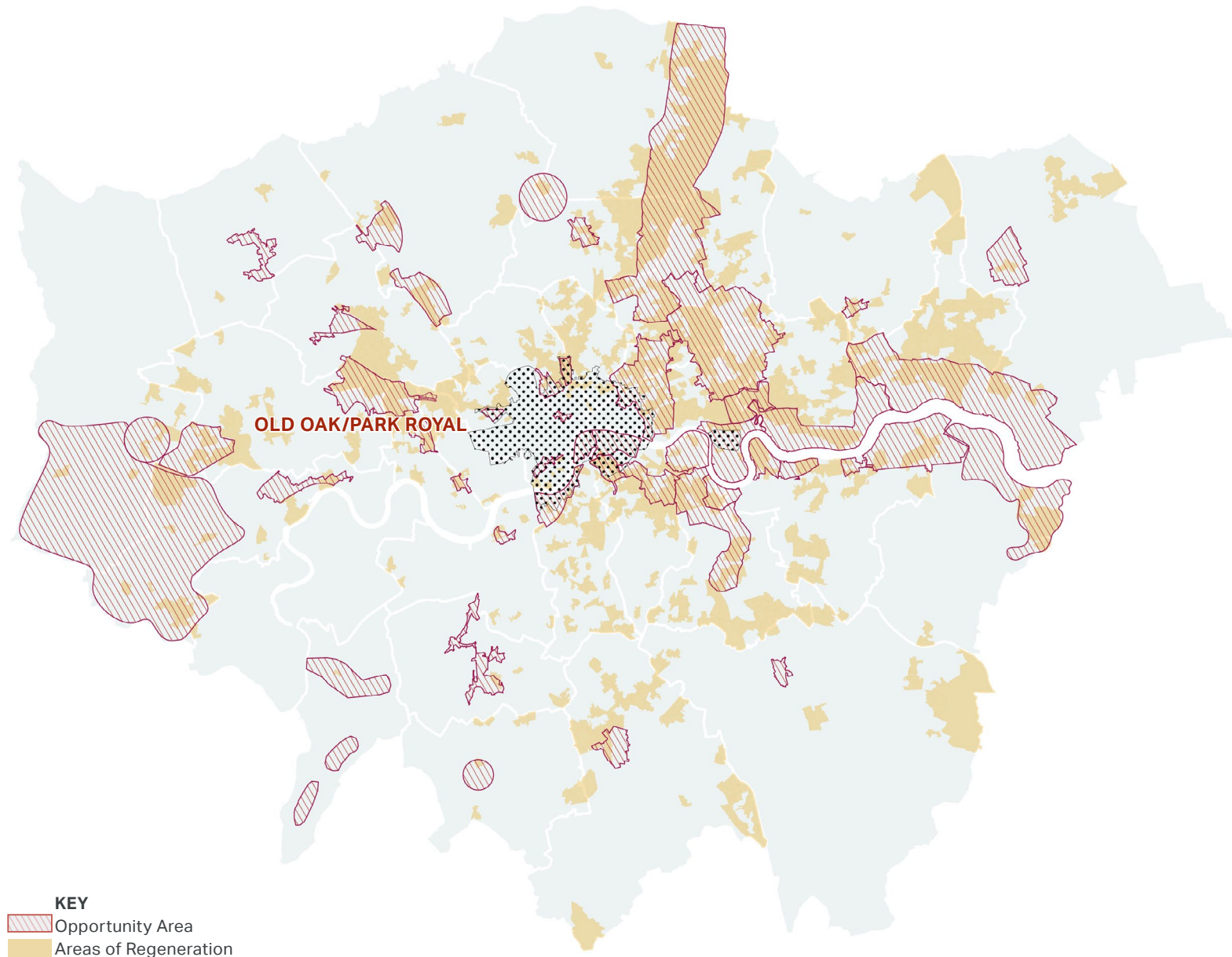
Old Oak/Park Royal Context

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)

Areas of Regeneration

The Old Oak/Park Royal OA overlaps with several areas of regeneration.

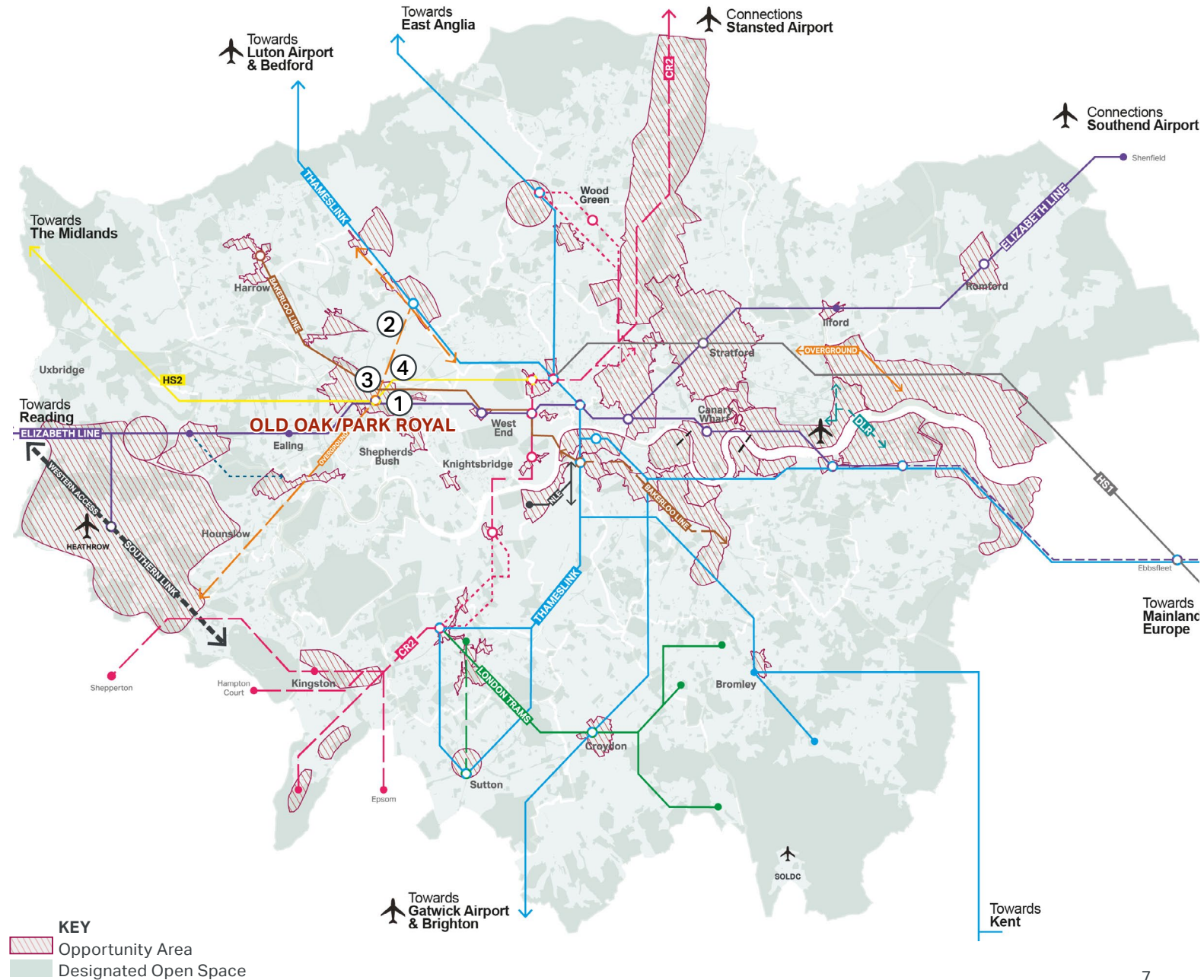


Source: Areas of Regeneration as per London Plan 2021

Old Oak/Park Royal Context

Transport and Growth Corridors:

- ① **New Old Oak Common station** connecting HS2 with Elizabeth Line and national rail.
- ② **West London Orbital (WLO)** - currently unfunded.
- ③ **New London Overground station at Old Oak Common Lane** - currently unfunded.
- ④ **Upgrades** to existing rail stations - currently part funded.



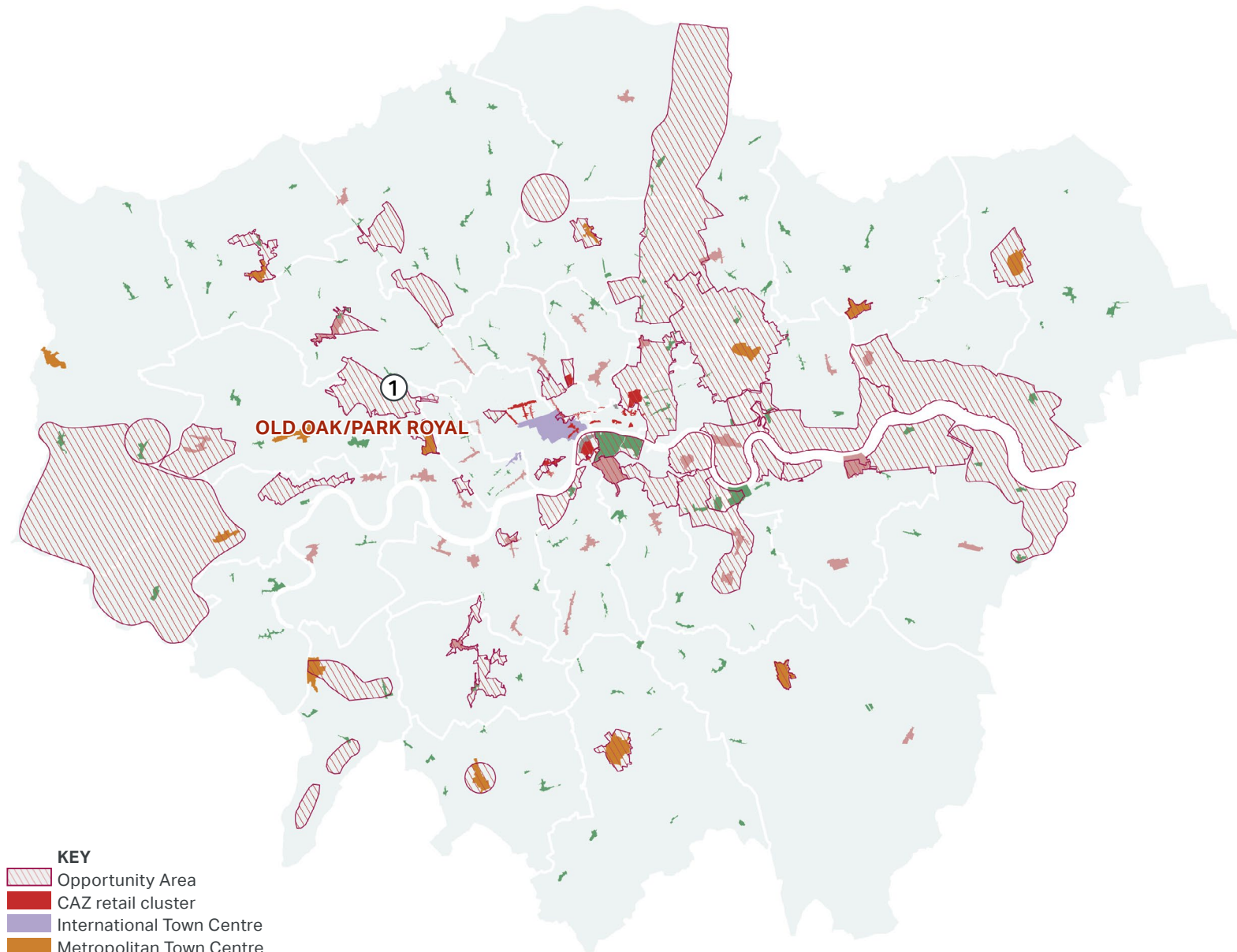
Old Oak/Park Royal Context

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)

This diagram is not relevant for OPDC OA as there are no Metropolitan Town Centre within the boundary. However it provides useful context across London.

- ① Please note that OPDC Local Plan (2022) designates a Old Oak Common as a Major Town Centre.



Source: [Planning Data Map](#)

Old Oak/Park Royal

Key info

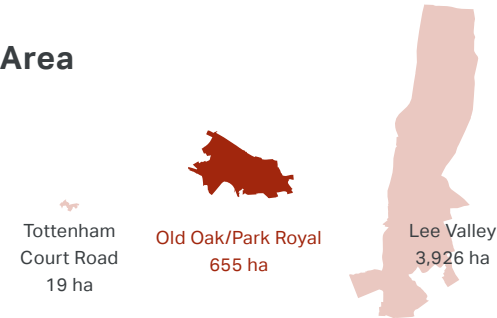
London Plan Designation Year

2004	2008	2011	2016	2021
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Borough

LB Ealing, LB Brent, LB Hammersmith & Fulham

Area



Local Plan status

OPDC Local Plan (2022)

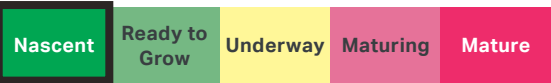
Growth Corridor

Highspeed 2/Thameslink, West London Orbital

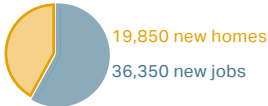
Housing Delivery Test 2023

Action Plan (OPDC)

OA status (London Plan 2021)



OPDC Local Plan capacities by 2038



Source: Google Earth



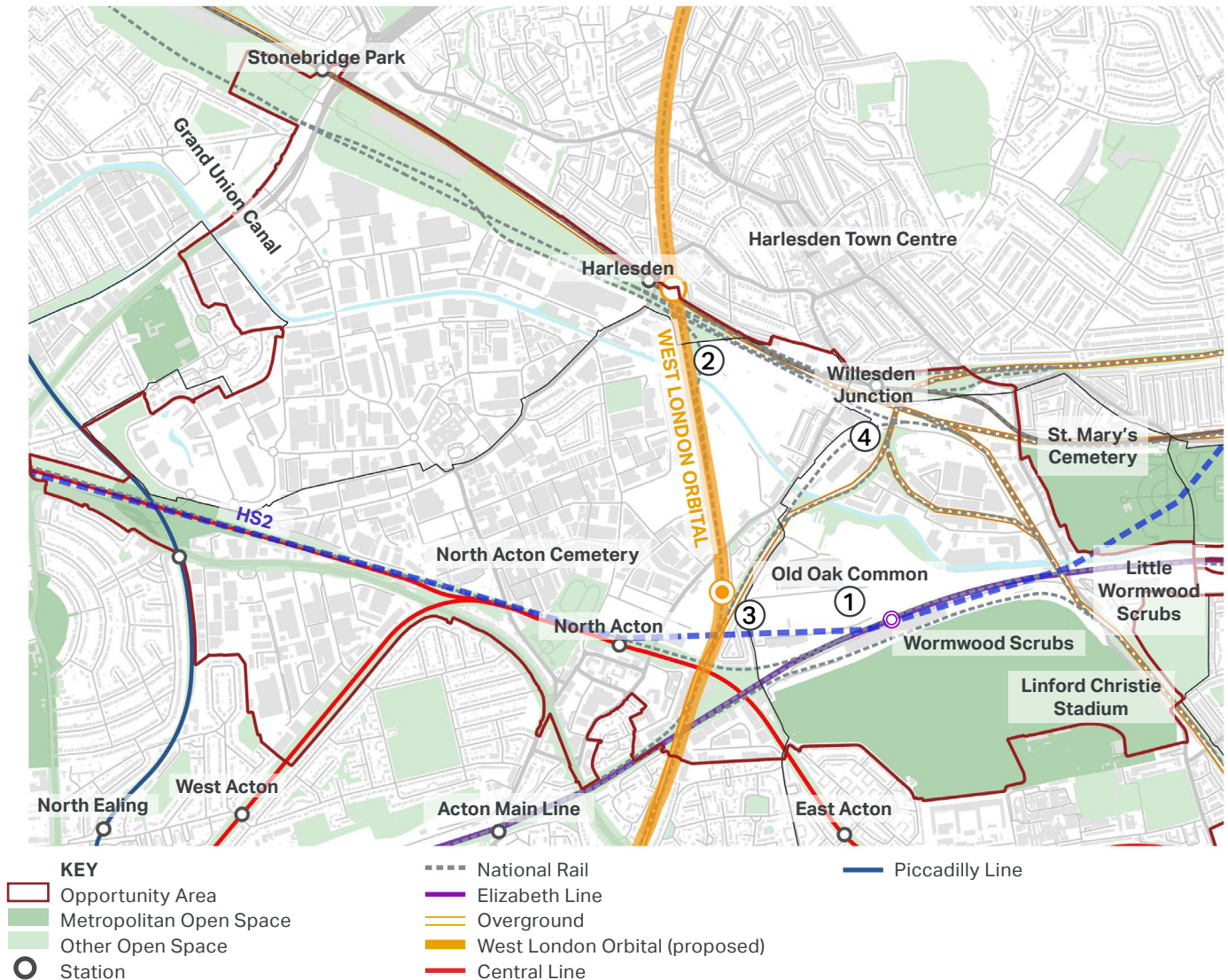
Old Oak/Park Royal

Transport and connectivity



- Planned key transport interventions in the OA include the:

- ① **New Old Oak Common station** connecting HS2 with Elizabeth Line and national rail.
- ② **West London Orbital (WLO)** - currently unfunded. Public consultation on the WLO is estimated to occur in 2025 and construction to start in 2030 (Subject to the ongoing business case).
- ③ **New London Overground station at Old Oak Common Lane** - currently unfunded.
- ④ **Upgrades** to existing rail stations - currently part funded.



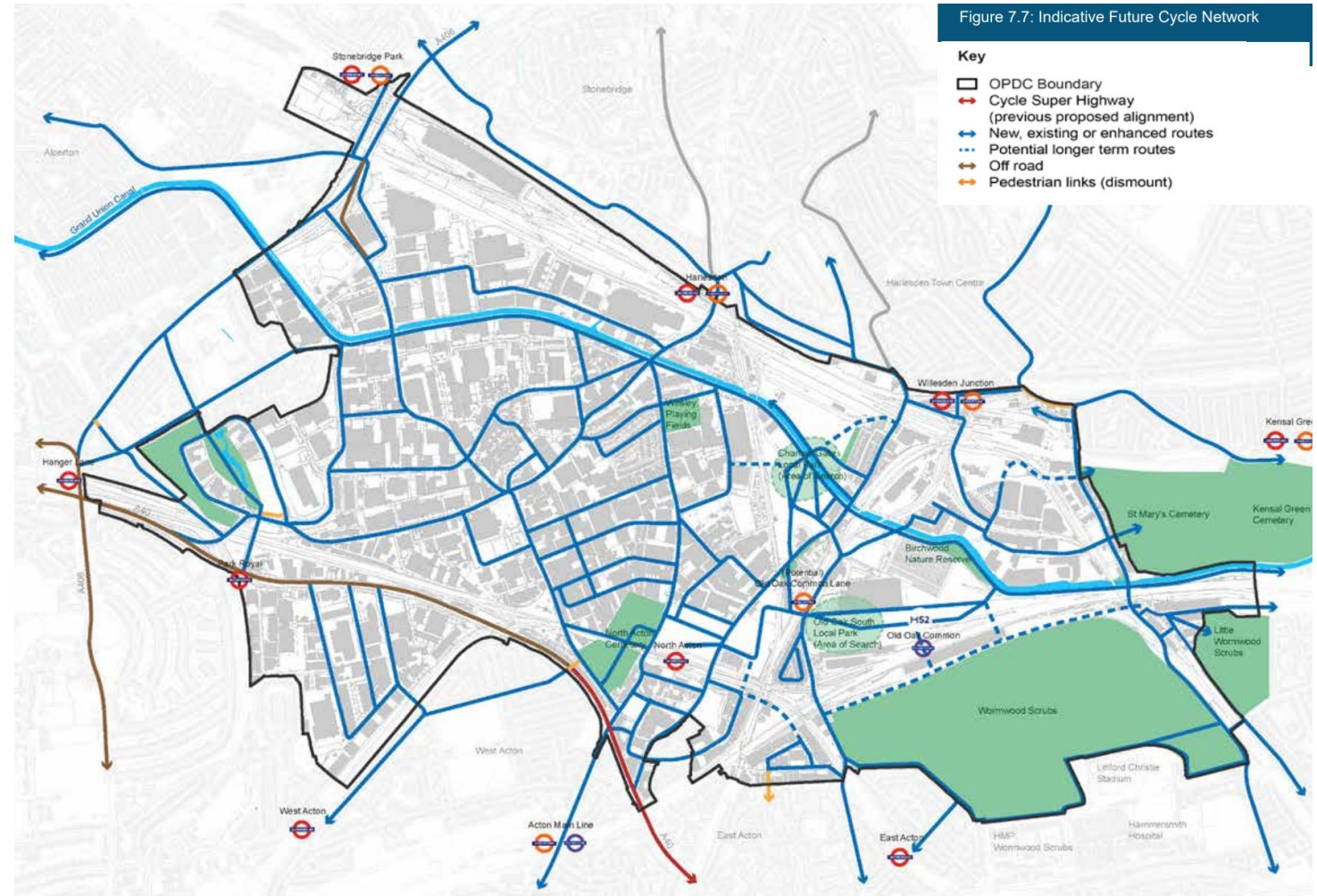
Old Oak/Park Royal

Transport and connectivity

- Enhanced routes are proposed within the OPDC Local Plan to:
 - Connect key places
 - Connect new and existing residential communities
 - Increase public transport accessibility (PTAL)
 - Support the Mayor's ambition for 80% of journeys to be by foot, cycle or public transport



Source: [OPDC Public Realm and Green Infrastructure SPD \(2024\)](#)

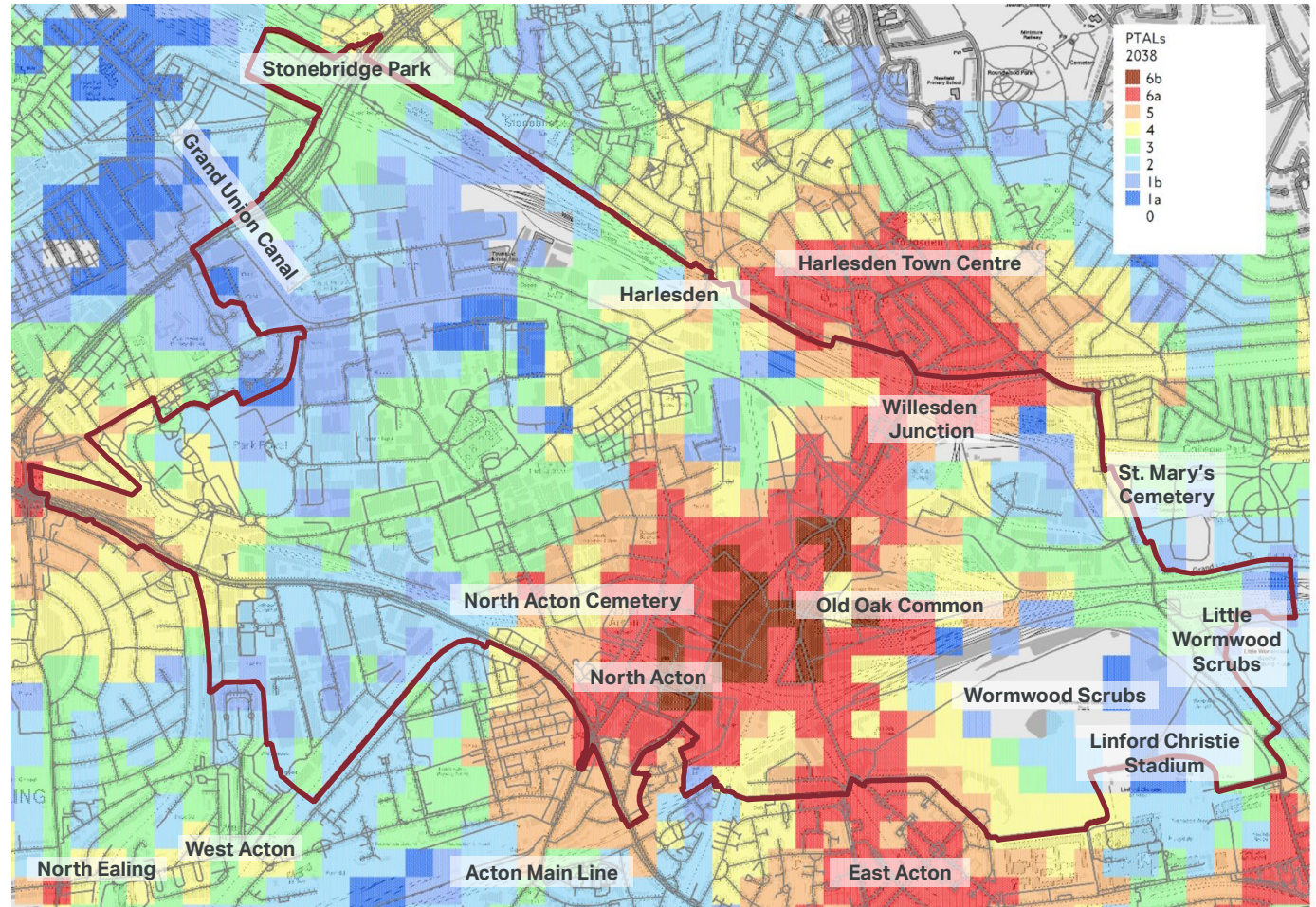


Source: OPDC Local Plan cycle network

Old Oak/Park Royal

Transport and connectivity: PTAL

- Old Oak Common Station will be the largest new station to be built in the UK and a hub for HS2, the Elizabeth line and the Great Western Main Line.

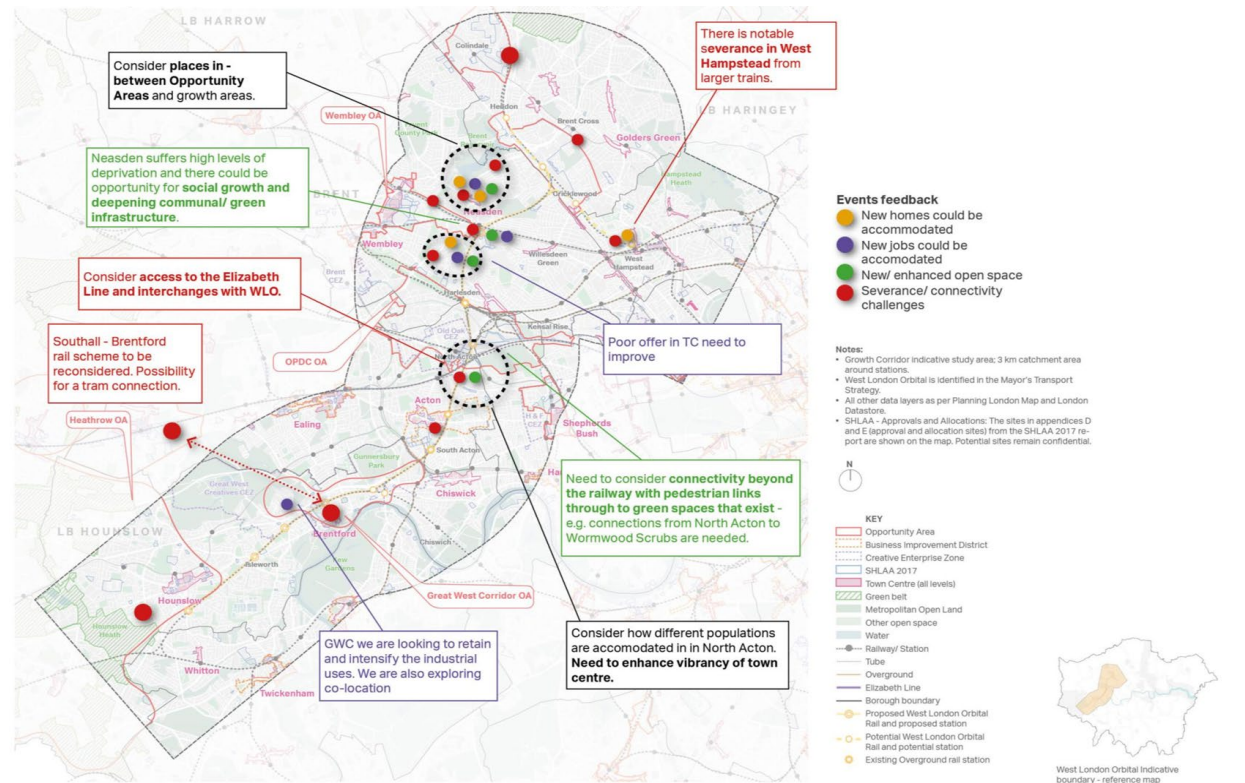


Source: Transport For London

Old Oak/Park Royal

Transport and connectivity: Growth Corridor Engagement

- Participants in the Planning for London Programme stakeholder engagement for the West London Orbital Growth Corridor identified:
 - A high drive for food delivery/ industries within the OPDC area as an industrial land intensification/co-location opportunity.
 - The need to design safer, wider and accessible cycle connections. The Old Oak Common Lane cycle path was raised.
 - North Acton to potentially accommodate different populations.
 - Need to enhance vibrancy of town centre in North Acton.
 - The summary is available via [this](#) link.

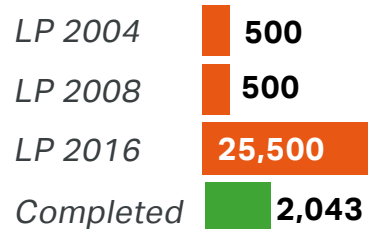


Old Oak/Park Royal

Delivery of homes

Delivery pre-2019

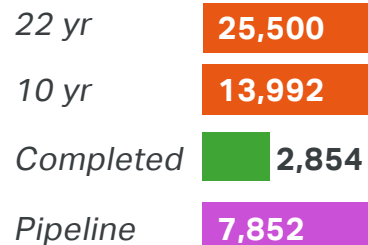
Completions since designation against capacity



OPDC was established in 2015, and between then and 2019, 1,453 homes have being completed.

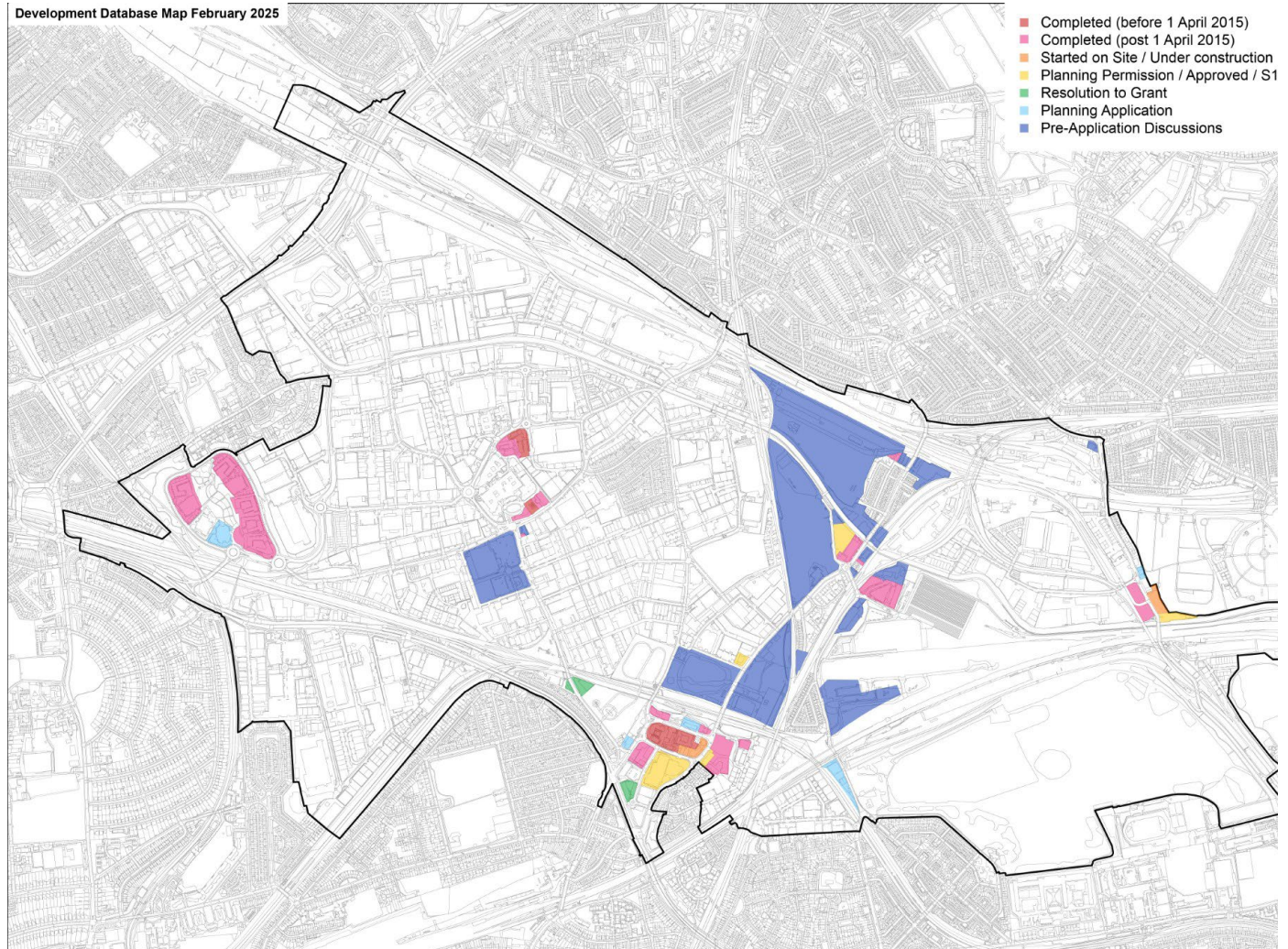
Delivery post - 2019 (OPDC Local Plan 2022)

Progress against 22yr, 10 yr capacity



Considering the completions and pipeline, the OA is meeting 78 per cent of its 10 year capacity. Current completions alone account for 11 per cent of the London Plan 22 year capacity and 20 per cent of the 10 year capacity.

Development Database Map February 2025



Source: OPDC

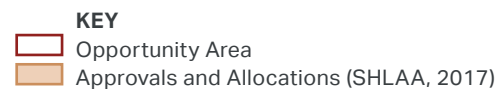
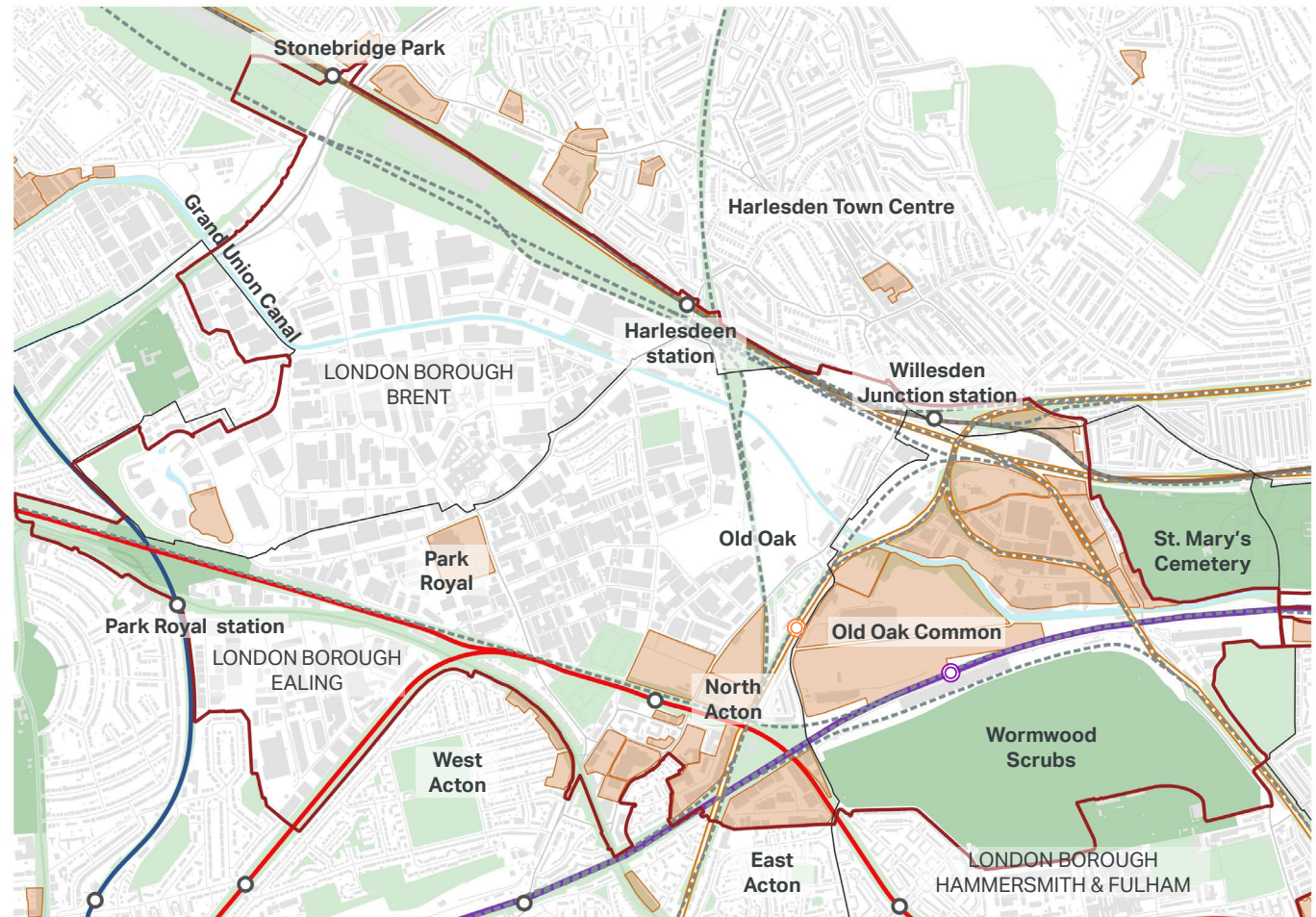


Old Oak/Park Royal

SHLAA 2017: Approvals and Allocations



- The SHLAA sites do not reflect the amended land use allocations in OPDC's Local Plan that was adopted in 2022.



Old Oak/Park Royal

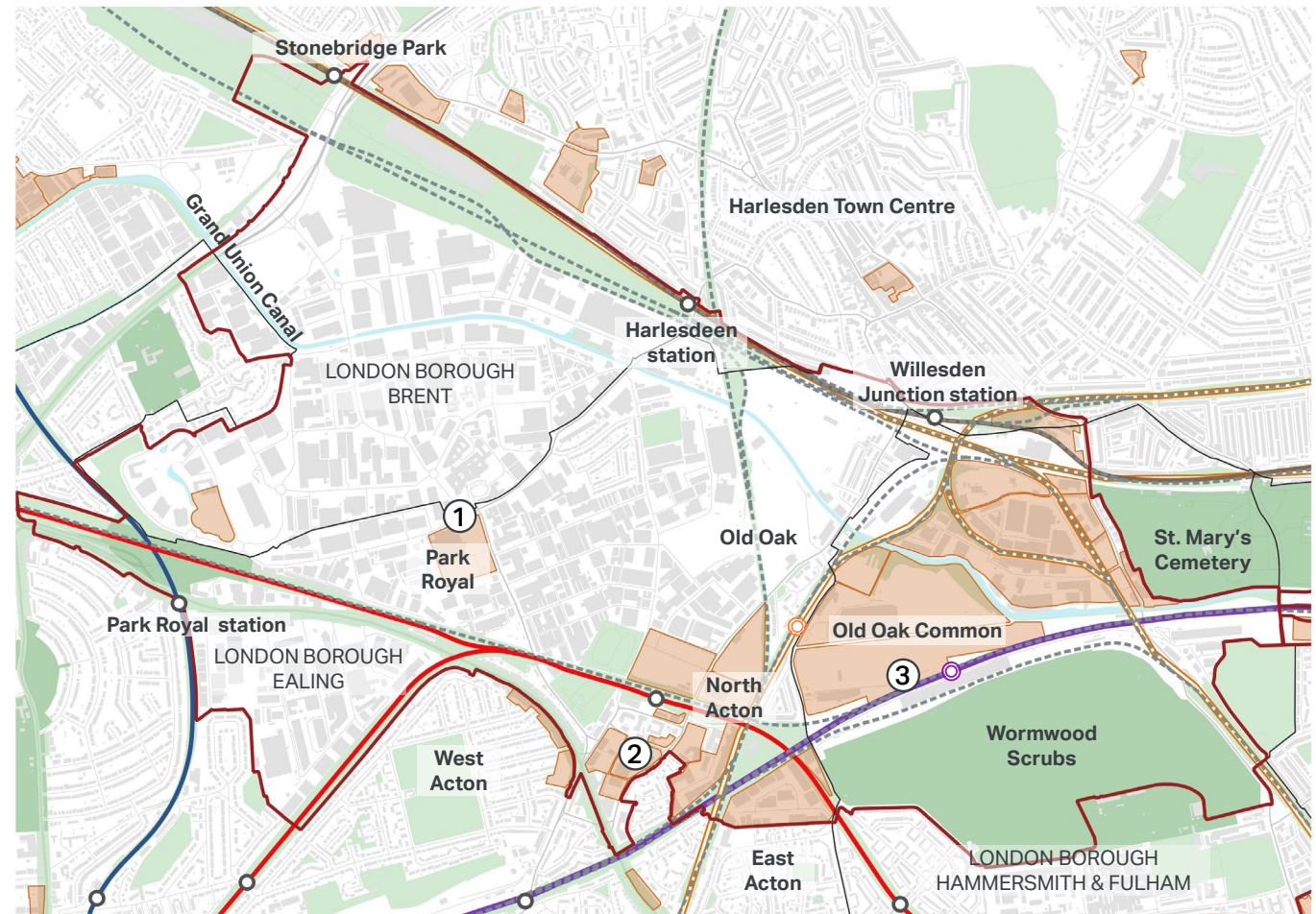
SHLAA, 2017: Development Progress



- Indicative snapshot:
- ① **ASDA:** In pre-planning, 1500 homes proposed in 'ASDA Park Royal'.
- ② **One Portal Way (Carphone Warehouse):** Approved in 2024. 1,538 homes proposed.
- ③ **Old Oak Common Station and surroundings:** In pre-planning as part of the wider Old Oak scheme which proposes up to 9,000 homes and up to 3 million sqft of workspace.



Old Oak Common Station



KEY

Opportunity Area

Approvals and Allocations (SHLAA, 2017)

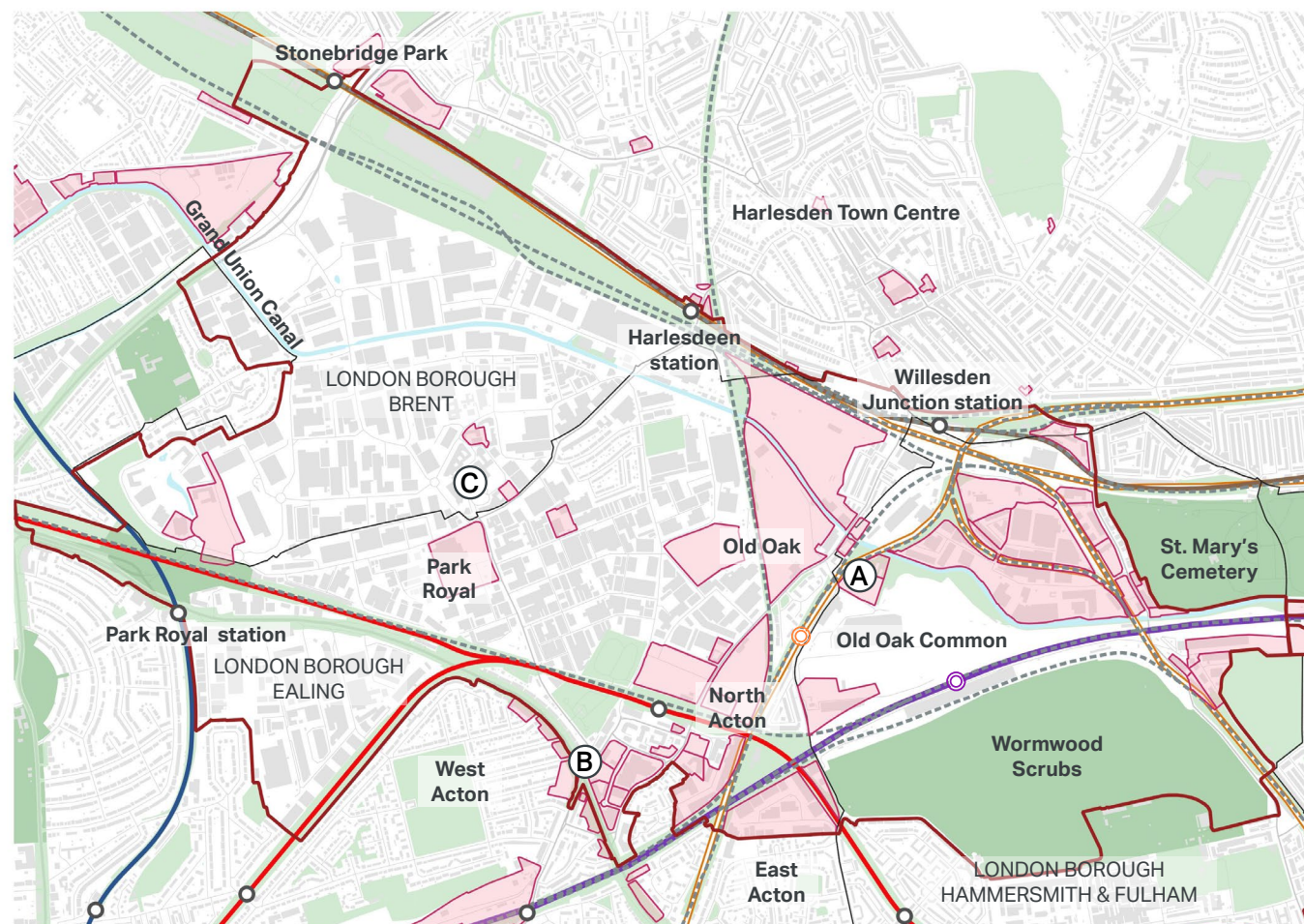
Old Oak/Park Royal

Site Allocations - OPDC Local Plan

- Since SHLAA 2017, progress has been made in terms of plan making in the OA, with OPDC adopting its local plan in 2022.
 - An indicative snapshot of development progress is presented below:
- A Oaklands Rise:** 605 homes completed in 2021 including 40% affordable homes.
 - B 4 Portal Way (Holiday Inn London West):** 669 homes proposed including 203 affordable housing. Awaiting planning permission.
 - C Central Middlesex Hospital North East Site:** 158 homes completed in 2024 comprising 100% affordable homes.

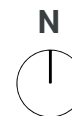


Oaklands Rise



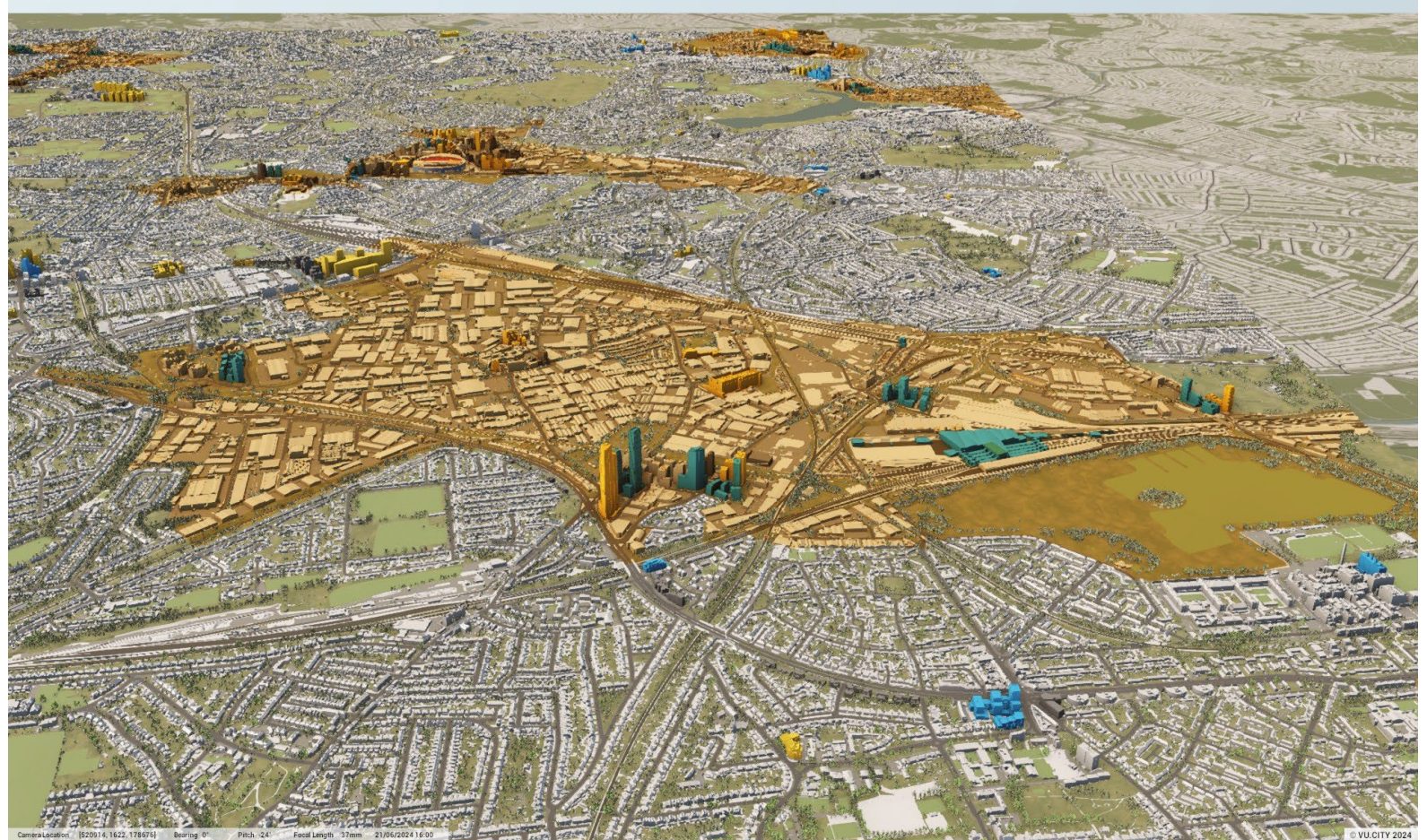
KEY

- Opportunity Area
- Site allocations (OPDC Local Plan)



Old Oak/Park Royal

Development activity 2021



Source: vu.city

KEY

- Consented
- Under Construction
- Completed
- Opportunity Area

Old Oak/Park Royal

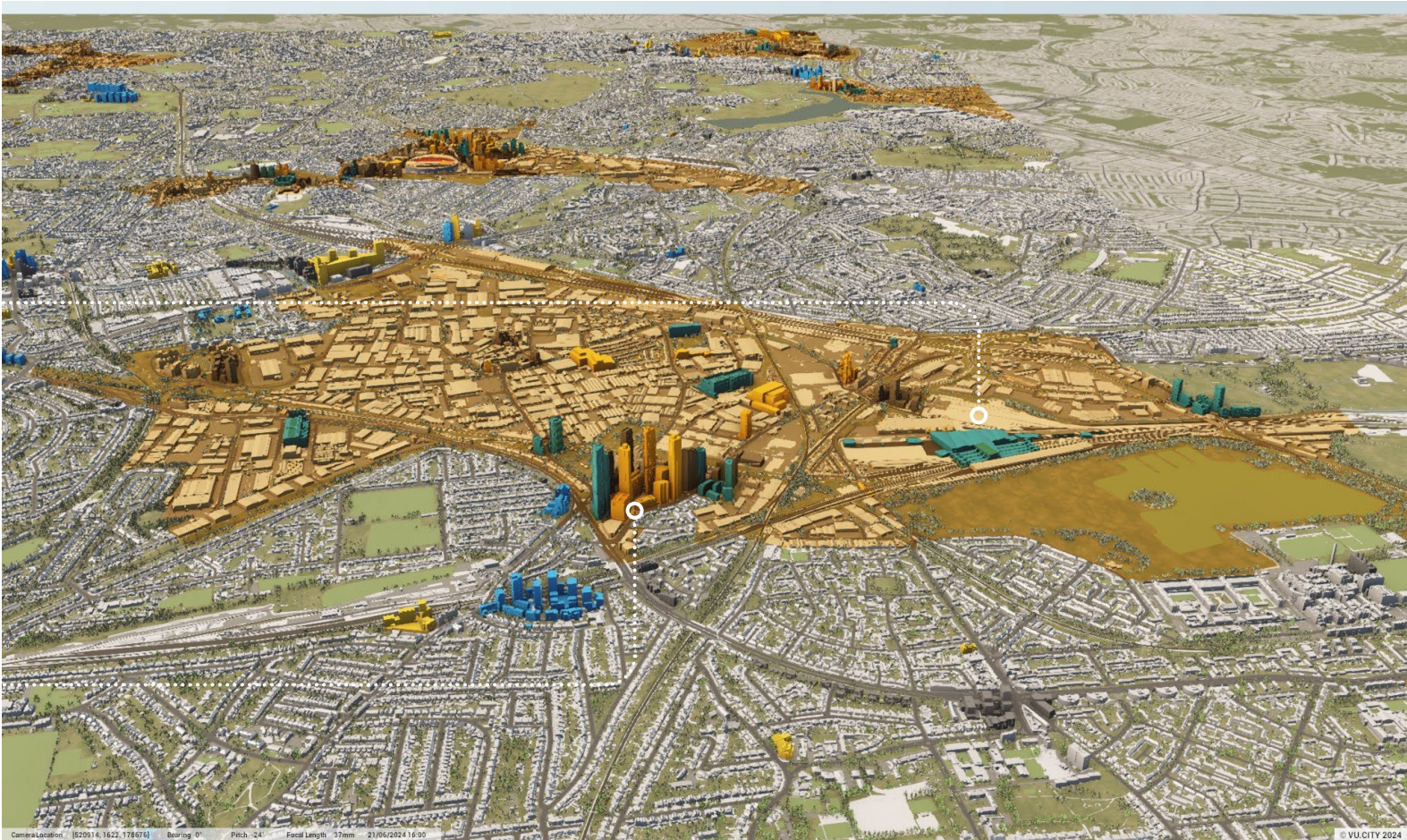
Development activity 2024



Old Oak Common Station



4 Portal Way



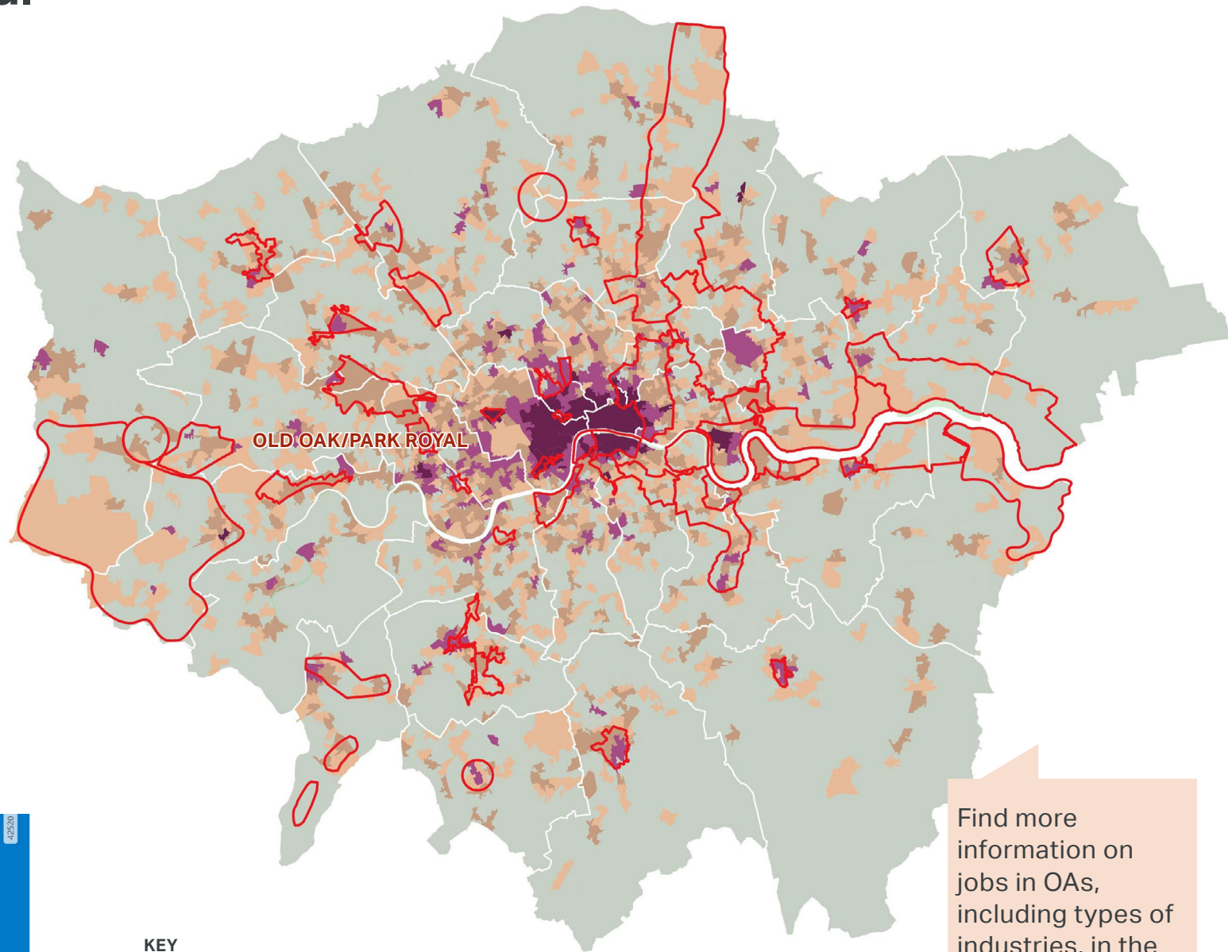
Source: vu.city

- KEY**
- Consented
 - Under Construction
 - Completed
 - Opportunity Area

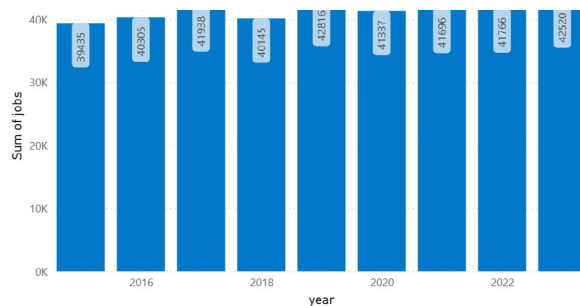
- Note:** OPDC noted the following inaccuracies in the vu.city model:
- 4 Portal Way - shows superseded scheme as under construction when it should be consented
 - The Castle - shows as completed when it's under construction
 - 5-7 Park Royal Road - shows under construction when it should be consented
 - Chanos Road Data Centre - shows as consented when it's under construction
 - Mitre Yard - shows as under construction when it's completed

Old Oak/Park Royal Jobs

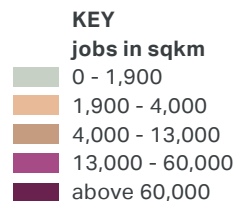
- Low to medium jobs density in Old Oak/Park Royal OA as shown in the map.
- In 2023, there were 42,520 jobs in the OA.
- The majority of jobs in the OA are in 'Wholesale & Retail' industry, followed by 'Manufacturing' industry. OPDC has the second highest number of Manufacturing jobs in an OA following Lee Valley OA.
- OPDC monitoring data shows a net gain of 190,249 sqm industrial floorspace being achieved since 2015.



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](#).

Old Oak/Park Royal

Jobs: Innovation and sustainability

- As mentioned in the Mayor's Growth Plan the OA is part of the **West Tech Corridor**.
- The West Tech Corridor is anchored in White City, and going north and west through Old Oak and Park Royal and towards Heathrow and Hillingdon, with HS2 at Old Oak Common opening up new economic opportunity.

Circular economy

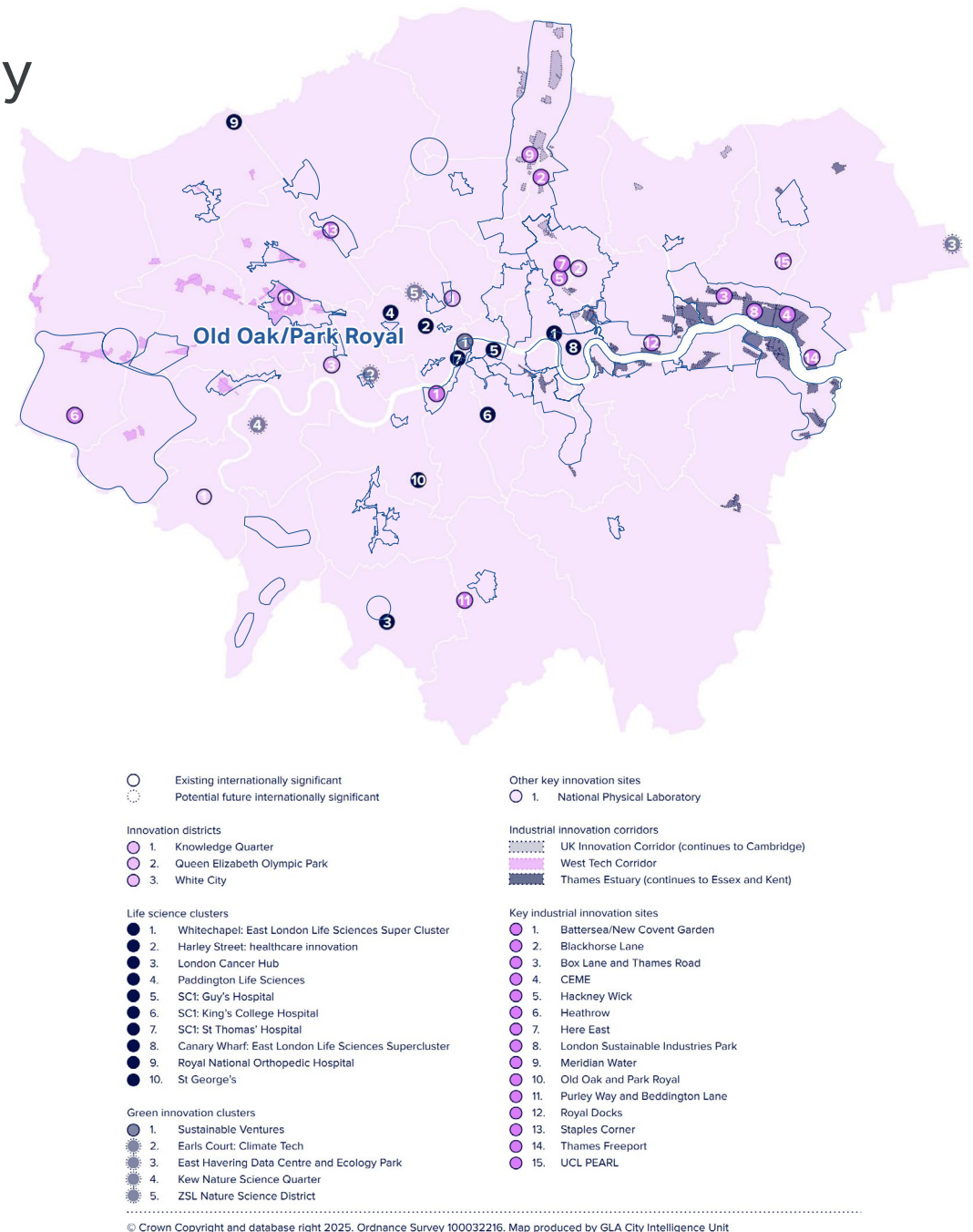
- Park Royal is home to many organisations that are promoting the development of innovative circular systems, as well as artists working exclusively with reclaimed and salvaged materials. OPDC is working with Park Royal Open Workshop and Re-Made, a material exchange hub, on a pilot project to develop solutions to process and monetise waste and surplus materials from the HS2 Old Oak Common station site.



Re-using clay waste from HS2 construction



Park Royal Open Workshop



Source: [Connecting People, Place and Planet at Old Oak and Park Royal Sustainability Charter](#)

Source: [London's Growth Plan](#)

Old Oak/Park Royal

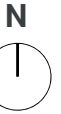
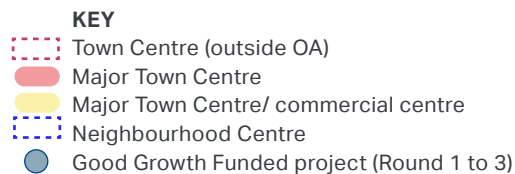
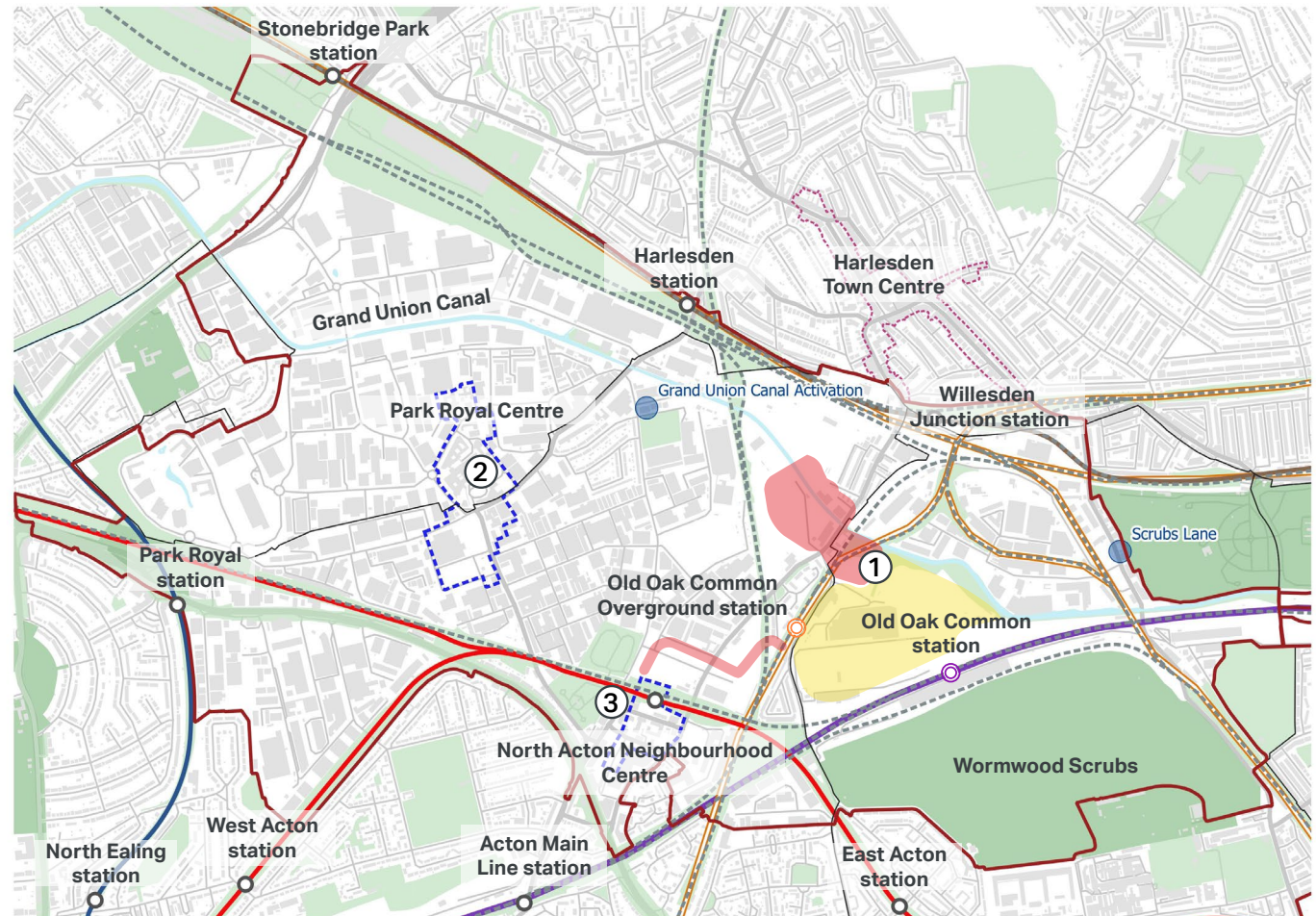
Town Centres and Good Growth

- Reflecting the Opportunity Area's historic development, the area is not home to high streets as such. OPDC's Local Plan has designated 3 new town centres:

- ① Old Oak Major Town Centre
- ② Park Royal Neighbourhood Town Centre: The Local Plan sets a minimum 800 homes target across Park Royal Neighbourhood Centre.
- ③ North Acton Neighbourhood Town Centre: The North Acton Neighbourhood Centre sits in the heart of North Acton which the Local Plan has allocated a minimum 5,200 homes target.



Source: [Canal Placemaking study - DK-CM](#)



Old Oak/Park Royal

Protected Industrial land

- The OPDC area has London's **largest Strategic Industrial Location (SIL)**. **47 per cent of the OA is SIL**. There are 42,000 jobs and 1,900 businesses within the OPDC area, and OPDC's industrial sectors are the largest industries by employment. OPDC's SIL plays a significant role in the local, London and national economy and this is recognised in OPDC's Local Plan.
- **There are a number of industrial related strategic and development management policies**, with the fundamental priorities being the need to protect, strengthen and intensify the industrial area, and to support the delivery of high quality and a diverse range of industrial floorspace and jobs.
- **Park Royal is home to the Park Royal and Acton Creative Enterprise Zone** reflecting the creative businesses in the area (No defined boundary).



Source: London Industrial Supply Study

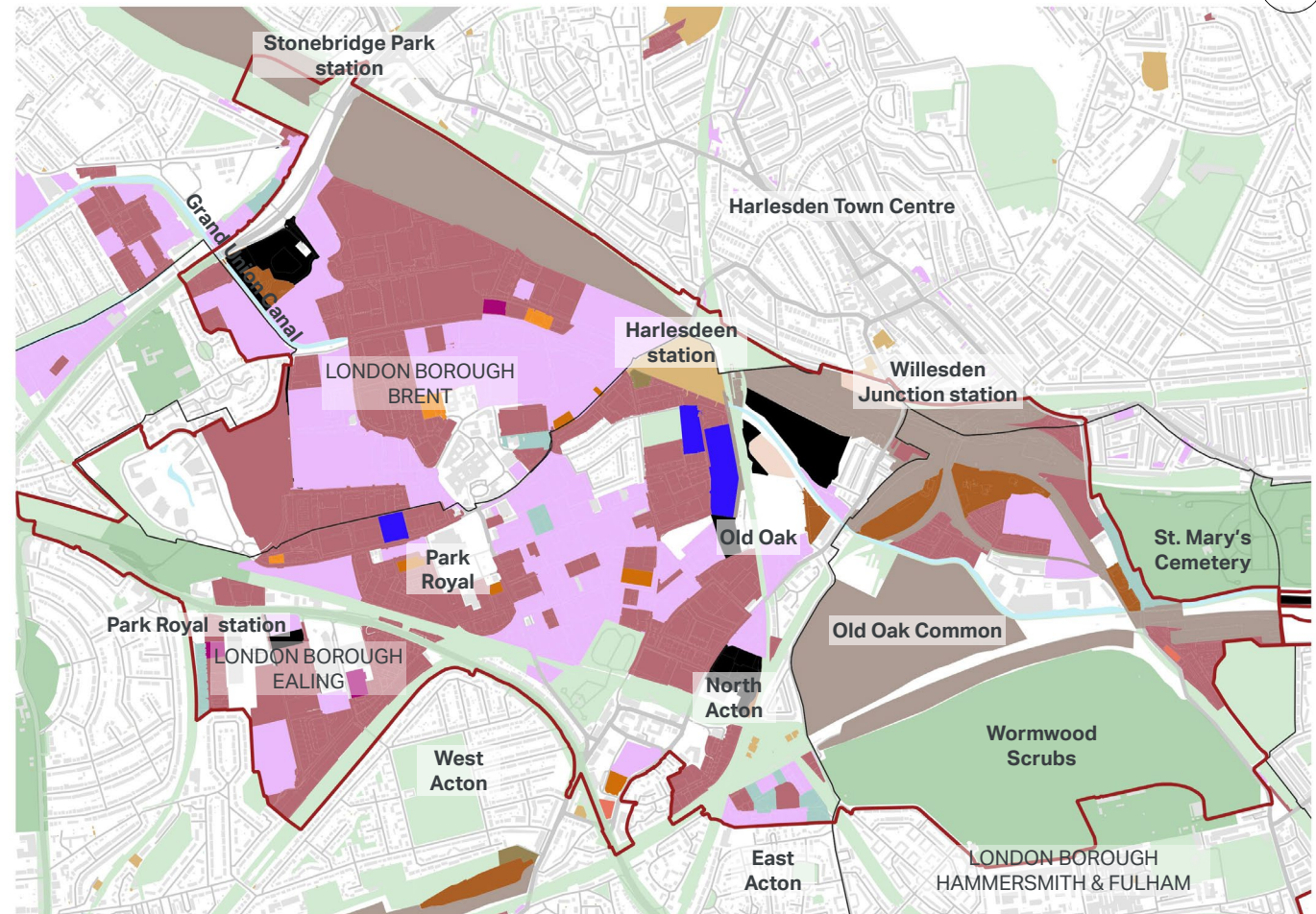


Old Oak/Park Royal

Industrial land: Types of industry

- Over 450ha of Old Oak and Park Royal remains designated as SIL.
- It performs **a key role in providing manufacturing, logistics and other industrial services** that help support the wider London economy.
- The OPDC Local Plan supports **industrial intensification within SIL**. This intensification could be achieved through a number of interventions, including multi-storey industrial typologies.
- Recent industrial developments that aren't shown on the map are **data centres, film studios and the clearance of sites in Old Oak for HS2 construction activities**.

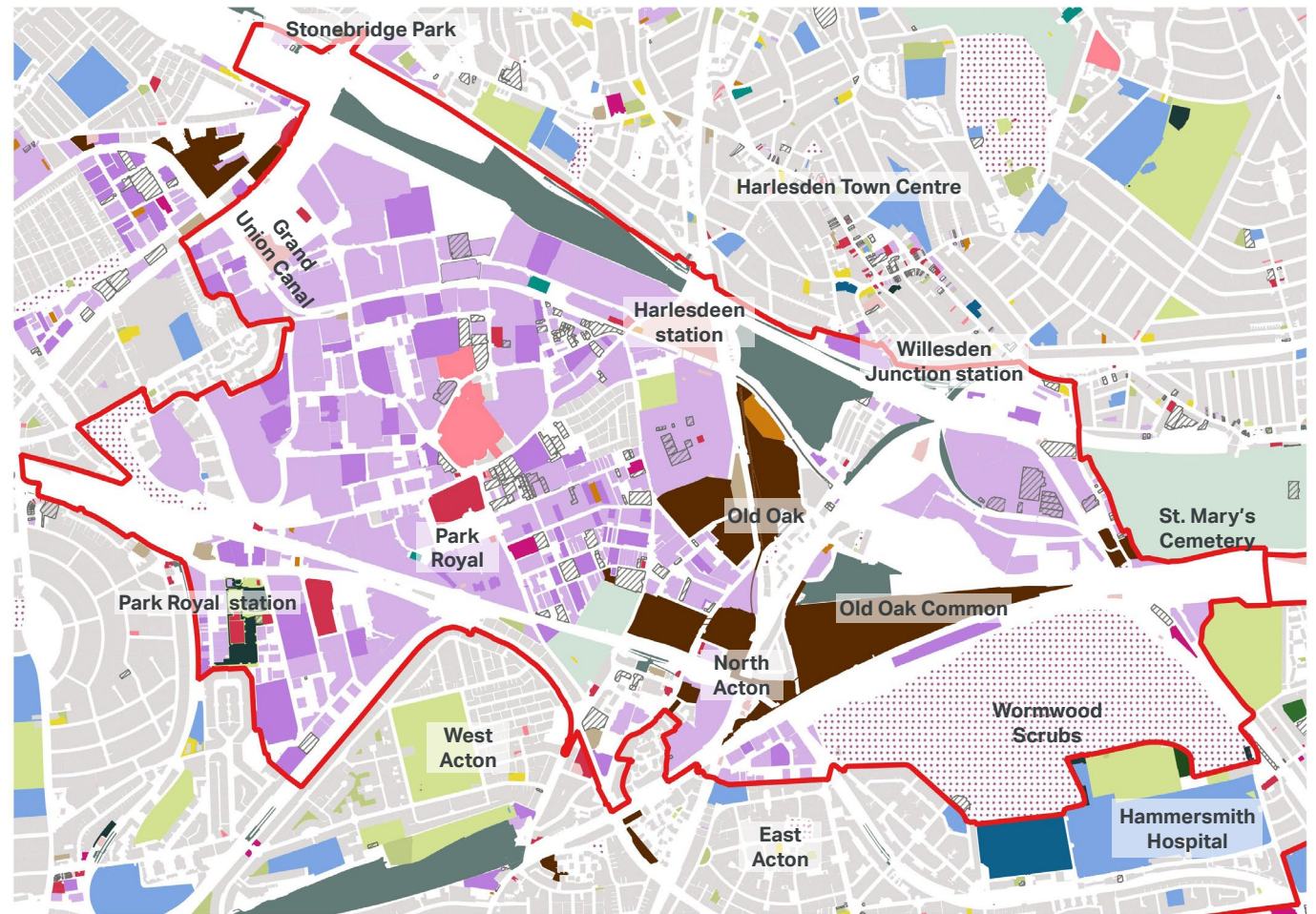
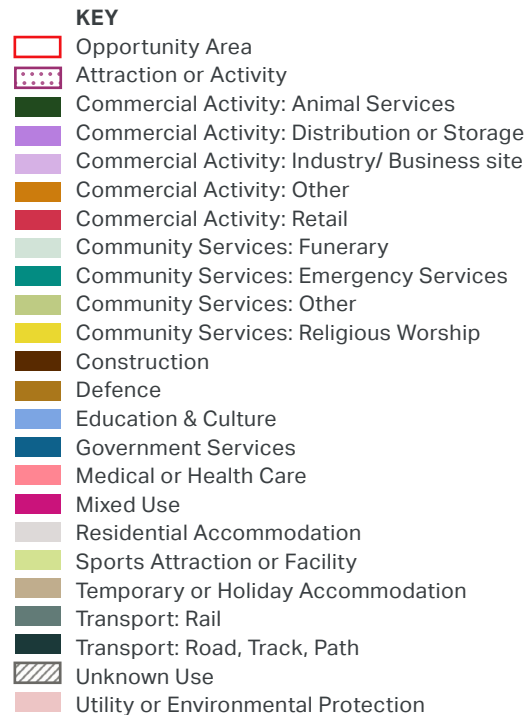
KEY	
■	Data centre
■	Docks
■	Film and TV studios
■	General Industry
■	Community Services
■	Land for buses
■	Land for rail
■	Land with vacant buildings
■	Light Industry
■	Open storage
■	Self storage
■	Utilities
■	Vacant industrial land
■	Warehouse
■	Waste management and recycling
■	Wholesale market



Source: London Industrial Supply Study

Old Oak/Park Royal

Land uses



Source: OSNGB, City Intelligence Unit (GLA)

Place strategies: OPDC Local Plan (2022)

- Majority of the OA is made up of Strategic Industrial Location (SIL).
- Enhanced and new routes to improve local connections and active travel routes to key places and stations are indicated on the diagram.
- Over 21+ years, Old Oak South will deliver a new commercial centre for west London, centred on the integrated world class Old Oak Common Station.
- The Local Plan also designates a new major town centre in Old Oak to serve the new resident and worker community there and those interchanges at the Old Oak Common station.

POLICY P1: Old Oak South

Figure 4.2: Old Oak South Place



Figure 2.2: Key Diagram

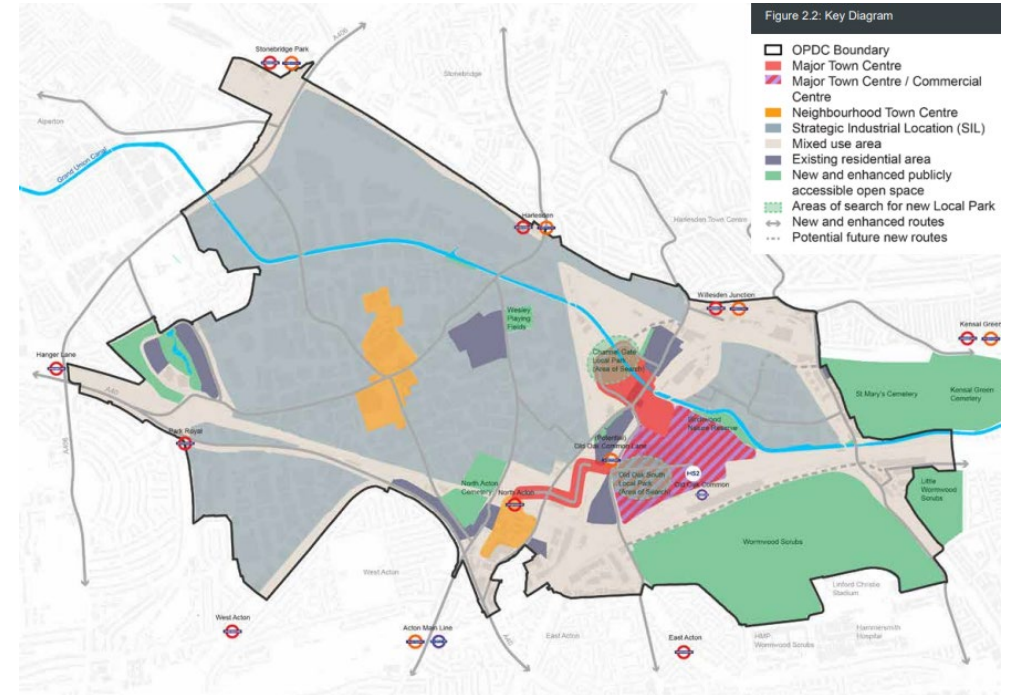
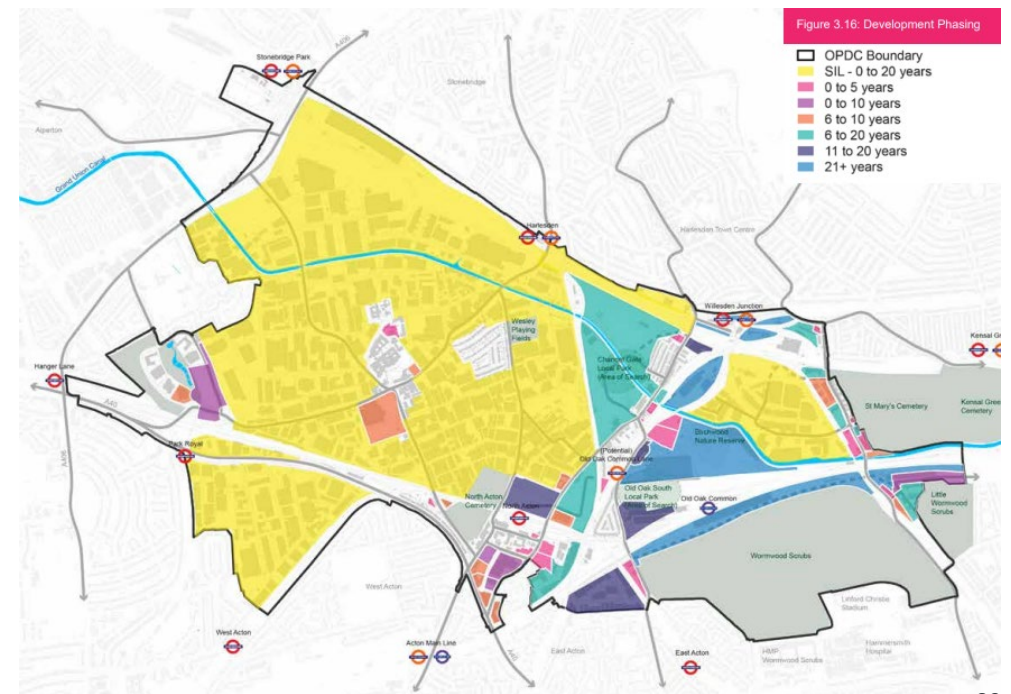


Figure 3.16: Development Phasing



Old Oak/Park Royal

Place strategies: Old Oak West SPD

- Provides guidance for the development of large scale publicly owned sites and adjacent sites within Old Oak West.
- Provides further guidance to deliver over 6,905 homes and approximately 22,365 new jobs as set out in the Local Plan.
- Sets out an illustrative masterplan demonstrating one way in which the area could be delivered.
- Provides guidance for new infrastructure including over 4 hectares of public open space.

Figure 6.4 Illustrative open space network

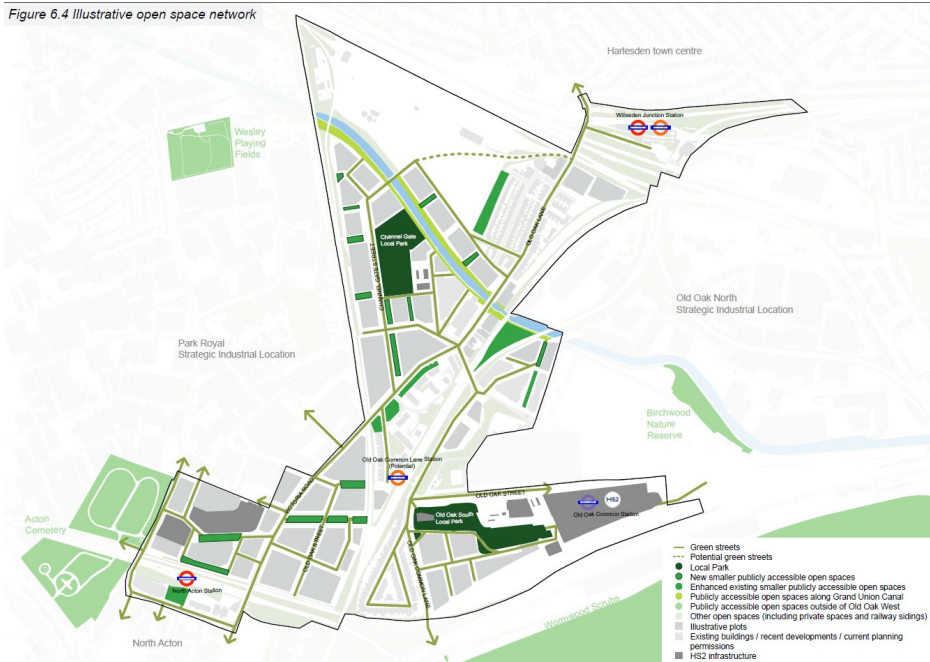
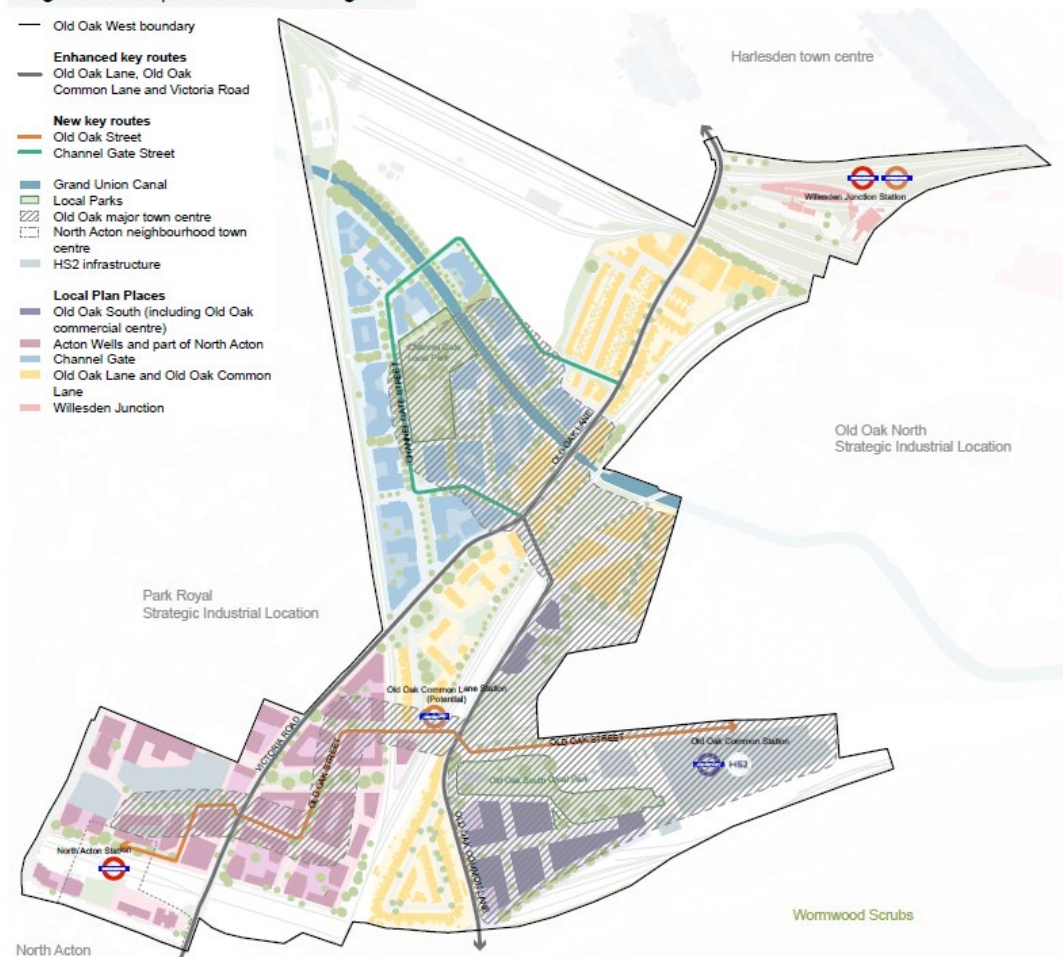


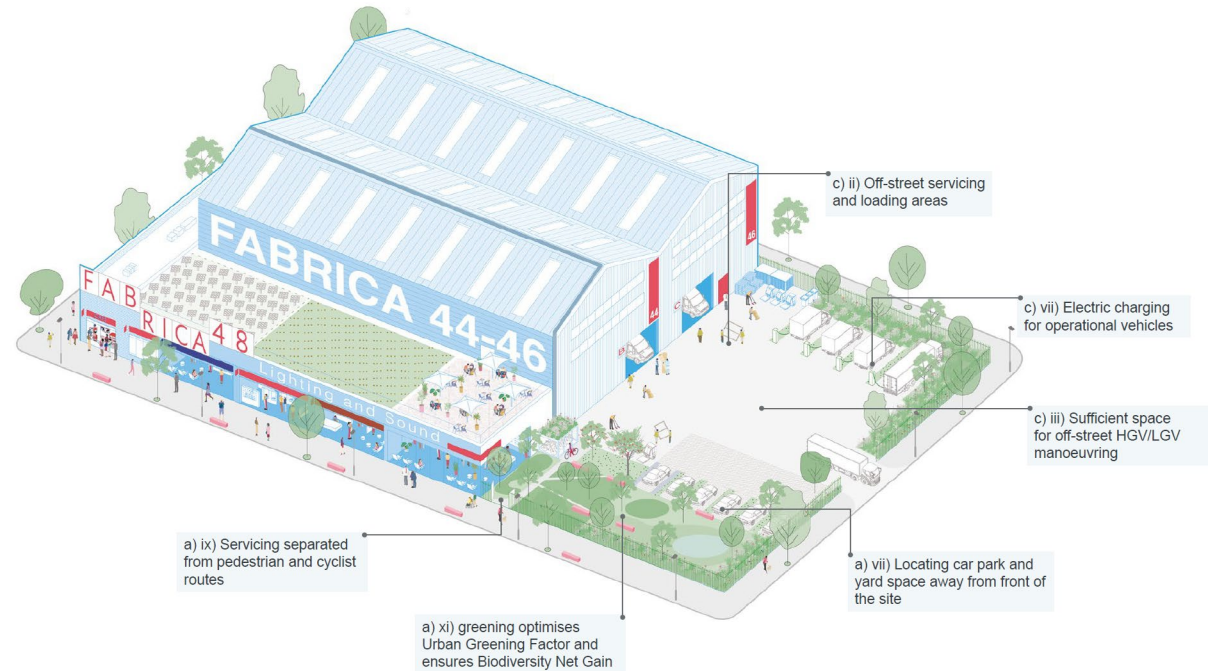
Figure 3.2 Spatial Vision diagram



Old Oak/Park Royal

Place strategies: Industrial SPD

- OPDC's Board adopted OPDC's Industrial Supplementary Planning Document (SPD) on 23rd November 2023.
- The Industrial SPD provides guidance to applicants on how deliver best practice industrial developments from a design, placemaking and sustainability perspective.
- The guidance covers larger and multistorey industrial development, maintaining safety and security whilst improving the public realm, supporting the health and wellbeing of industrial workers, and optimising the delivery of green infrastructure and environmental benefits.
- In 2024 the SPD won the National Planning Award, the RTPI London Award and a Commendation at the RTPI National Awards for its role in supporting the delivery of high quality and sustainable industry in Old Oak and Park Royal



Old Oak/Park Royal

Place strategies: Public Realm and Green Infrastructure SPD

- OPDC's Board adopted OPDC's Public Realm and Green Infrastructure Supplementary Planning Document (SPD) on 13th June 2024.
- The Public Realm and Green Infrastructure SPD provides guidance to applicants on how to deliver high quality, safe and welcoming public realm and green infrastructure from a nature recovery, design, placemaking, movement, Equity, Diversity and Inclusion (EDI) and sustainability perspectives.

Figure 7.8 Illustration of how principles could apply to a Local Park in the evening or night time

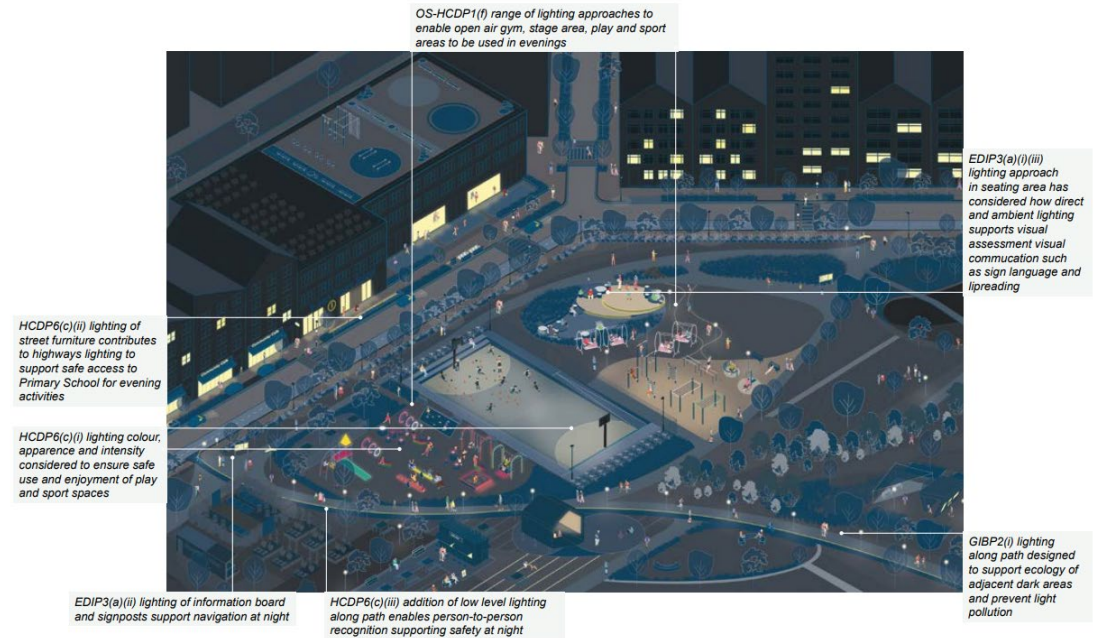
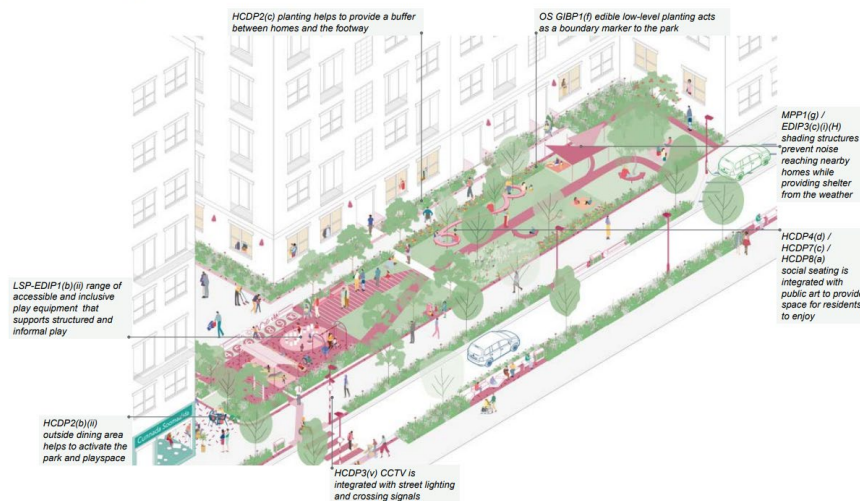


Figure 7.9 Illustration of how principles could apply to a Pocket Park in a Local Street in a mixed use area



Old Oak/Park Royal

Moving forward

Homes Delivery

- Since the establishment of OPDC, 4,307 homes have been completed. 2,854 homes have been completed since 2019/20.
- The OA has a pipeline of 7,852 new homes.
- Considering the completions and pipeline, the OA is meeting 78 per cent of its 10 year capacity. Current completions alone account for 11 per cent of the London Plan 22 year capacity and 20 per cent of the 10 year capacity.
- The OA large scale development sites are HS2 construction sites. The delay to HS2 alongside wider market factors has influenced the rates of delivery.
- 31 per cent is public land. OPDC is in the process of acquiring a number of sites in the Old Oak area.

Jobs

- The OPDC monitoring data shows a net gain of 190,249sqm industrial floorspace being achieved since 2015.
- OPDC currently developing economic vision, and will be updating its economic evidence base for its next Local Plan.
- The OA sits in the West Tech Corridor as identified in the London Growth Plan.
- Important to consider the role of the OA alongside the Heathrow narrative/ future OA vision.

Proposition

- Update status from 'Nascent' to 'Underway' as a lot of development sites have been allocated and pre-planning is on-going for approved sites.
- Continue to optimise deliver of homes and jobs through future updates to OPDC's Local Plan and delivery of OPDC's proposals for Old Oak.
- Joint working with OPDC, TfL and central Government to maximise benefits for London and Londoners.



Source: Old Oak Common Station Plaza Gardens

Old Oak/Park Royal

Moving forward

Infrastructure

- HS2 is under construction alongside enhancements to existing stations and new stations.
- Social infrastructure is planned to support local communities
- Opportunities to enhance walking and cycling routes and create a network that connects the Grand Union Canal, stations, key places and green spaces in the OA.
- OPDC has been awarded £36 million from the government's Green Heat Network Fund (GHNF) to harness waste heat from the cooling of several data centres.
- The OA sits within the West London area currently affected by electricity capacity constraints.

Early engagement continues with the electrical distribution and transmission networks to better align investment programmes with the development timelines. Account should be taken to coordinate with relevant water utilities providers for water attenuation measures



[Source: PLP architecture](#)