

*THE*  
PARK  
ROYAL



ATLAS

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*An Employment Study  
of  
London's Largest Industrial Area*

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

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The Park Royal Atlas is an employment study prepared by the Mayor's Regeneration Team, cliented 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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**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.

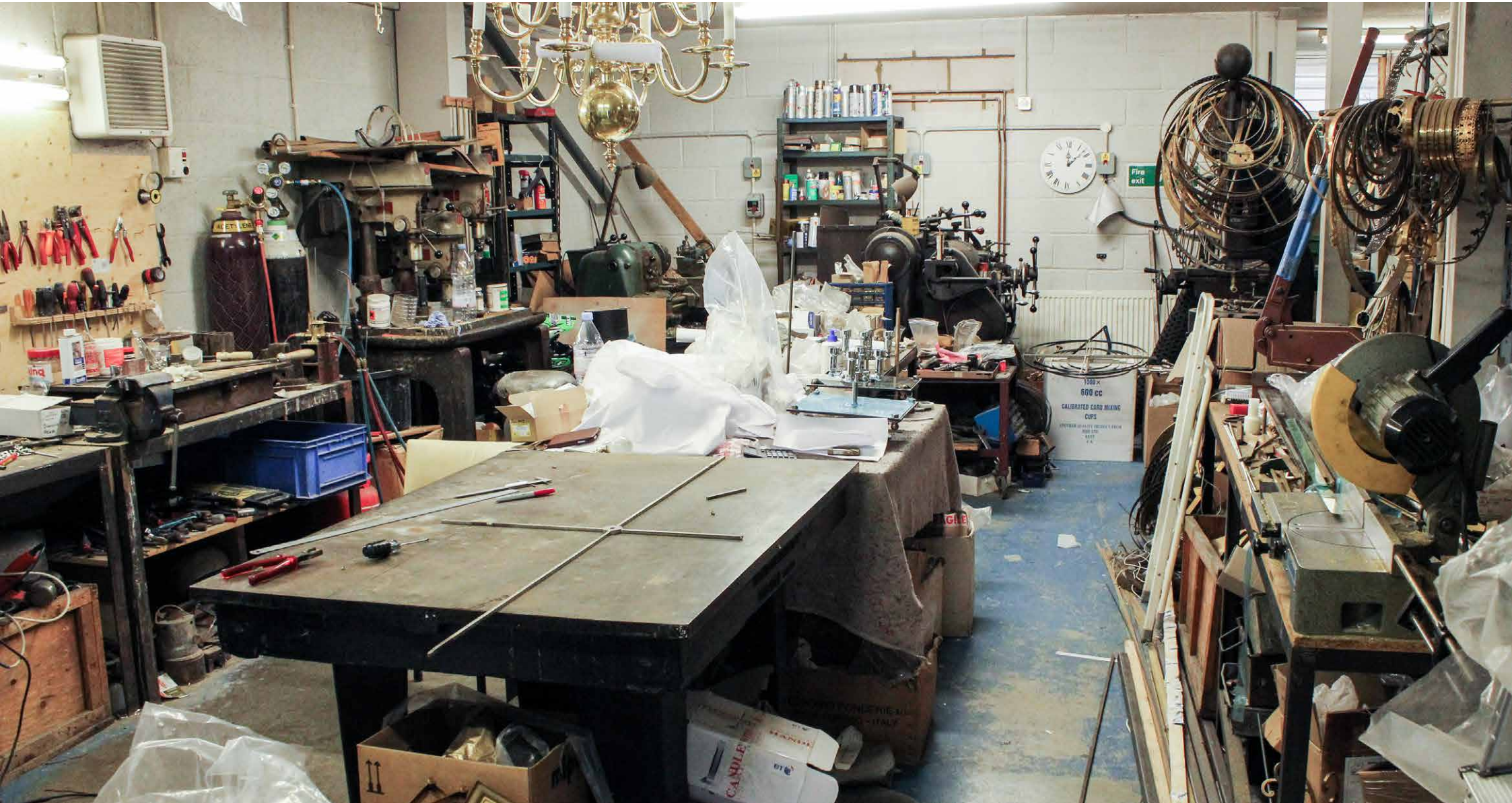


Kit Malthouse  
Deputy Mayor of London for Business and Enterprise

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

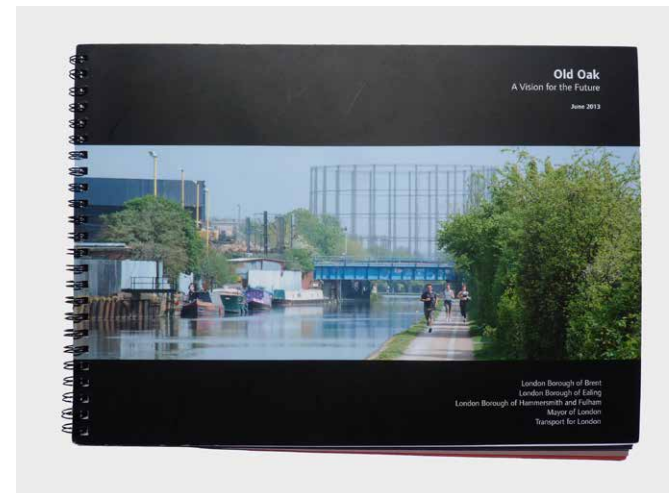
Park Royal is an industrial area located to the west of central London. It is situated within three London boroughs, Brent, Ealing and Hammersmith and Fulham. The area is bounded by National Rail, Overground and Tube lines to the north, south and east, while the North Circular (A406) and Western Avenue (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.

## 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.



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

**fig. 1 Park Royal LOCATION MAP**

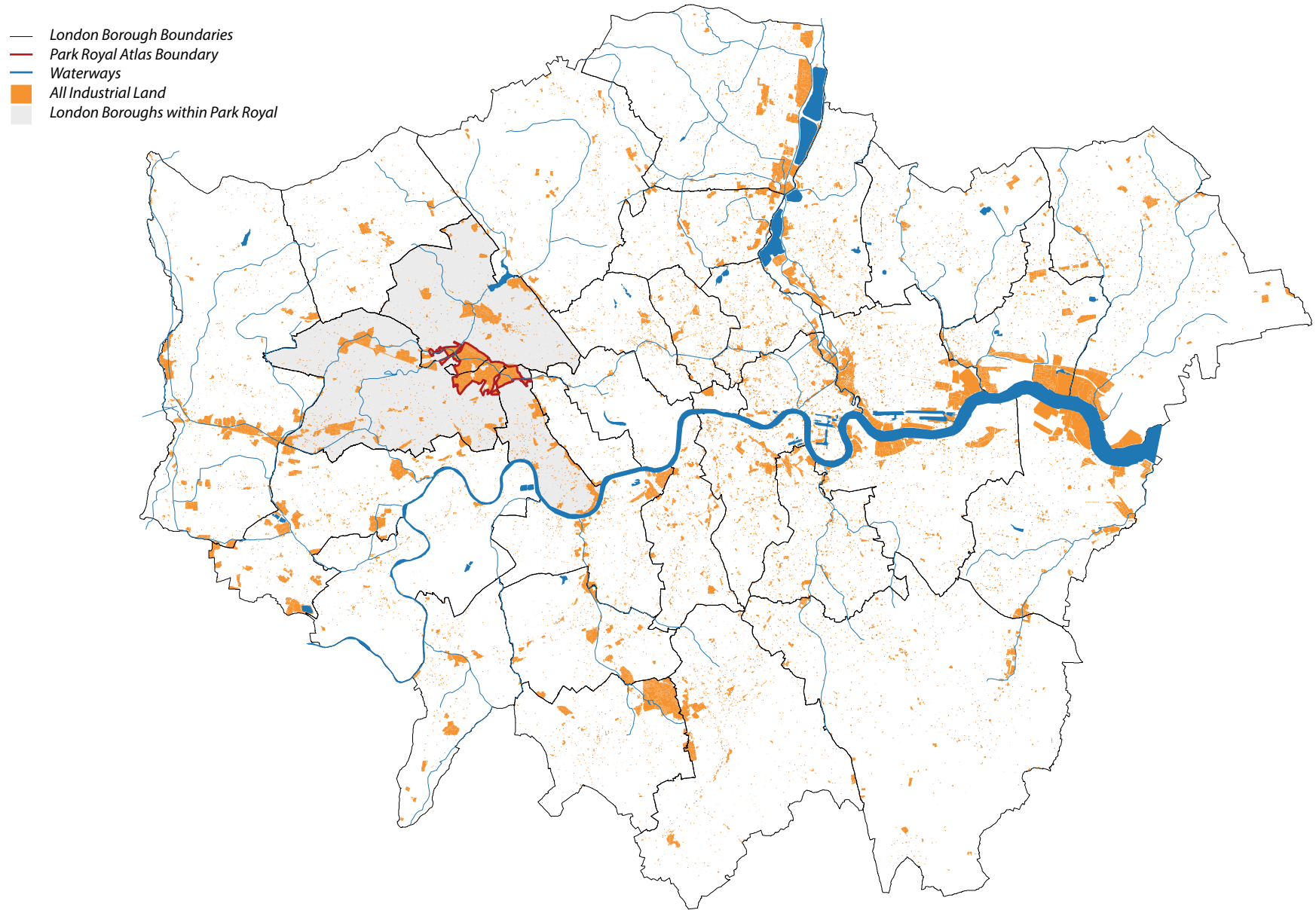
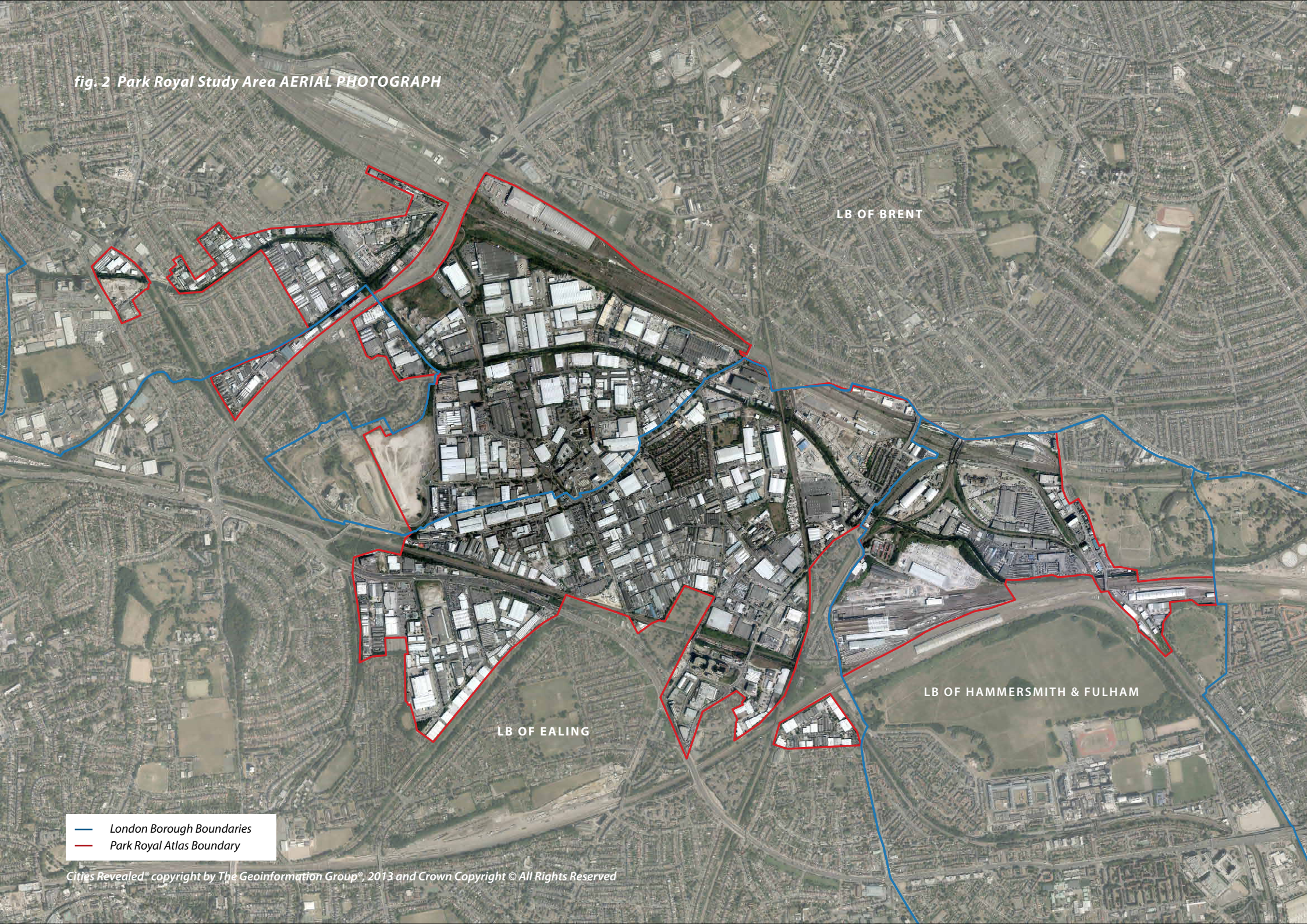


fig. 2 Park Royal Study Area AERIAL PHOTOGRAPH



LB OF BRENT

LB OF EALING

LB OF HAMMERSMITH & FULHAM

— London Borough Boundaries  
— Park Royal Atlas Boundary



## 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 Affi 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  
Alpertron 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  
Arognance 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  
Autotrast  
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 Beat  
Beat About The Bush  
Beauty Base Ltd  
Beck's Cafe  
Bees Enterprises  
Beijing Tong Ren Tang (UK) Ltd  
Beirut Nights Café And Restaurent  
Bell Trading Ltd  
Bellissimo Ltd  
Belmont Printing Company  
Belvedere Carpets Ltd  
Ben Pearce  
Benchmark  
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  
BMW 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  
Braifrom  
Brand Distribution (UK) Ltd

Bravo Aluminium Systems  
Brazilian Salon  
Bread And Honey  
Breezmount  
Brian Clarke Studio  
Brightbox Marketing  
Britannia Autos Ltd  
Britfil Steel Fabrication  
British Council  
Broadcast Sessions Ltd  
Brooks Packaging Ltd  
Brownell Ltd  
Browns Sea Foods  
Brunnell 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  
Cafe Royal  
Caffe Concerto  
Caffe Giordani Ltd  
Cakubi Consulting Ltd  
Caldigit  
Caledonian Supply Company & Madharrin 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  
Celix Ltd  
Cellia'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  
Codeceptional 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 Declarative Centre  
Crown House Business Centre  
Management  
Crystal Laundry 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  
Darry King 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  
Euroscant  
East West Merchandise  
Easy Car Hire Ltd  
Easy Housing Association  
Easybus  
Easyreach Ltd  
Eccentric Trading Company Ltd  
Edmundson Electrical  
Edwards Removals  
Edwinds Bathrooms  
EE  
Ej Bushell & Sons Ltd  
El Omara  
ElecMec Ltd  
Electec Solutions  
Electrocin Automatics Ltd  
Electrocin 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  
Ena Films  
Energy Star  
Enotria Wincellars 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  
Eska 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  
Eurostar  
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 Caribbean Restaurant  
 Feelin Hungry Ltd  
 FG Tyres  
 Fianadca  
 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 Collision/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 African Caribbean  
 Carers & Sufferers Of Dementia  
 Fruition Homes Ltd  
 Fruition Properties  
 Fujiseiki Europe Ltd

Furnish  
 Fx Rentals  
 G. Jackson  
 G4S Group  
 Gag Trunks 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 Solicitors 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  
 Hanams 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  
 HJ 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  
 Hozion 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  
 Ileinei  
 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  
 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  
 Laskethorne Group  
 Lambert Of London Ltd  
 Jan 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 Couriers 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  
 Laskethorne Group  
 Lambert Of London Ltd  
 Lane Harries & Jane Percy-Rob  
 Laser Tyre Station  
 Laundry  
 Lawrence Zammit  
 Lbc  
 Le Connaiseur  
 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 Coniserie Duchateau  
 Ltd  
 Leste Ltd  
 Levant Tv  
 Levantine (UK) Ltd  
 Lh2  
 Libanese Centre  
 Life Residential  
 Mammamia Itlaian Food Ltd  
 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  
 Lofbers  
 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  
 Luckshme Limited  
 Luncheon 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  
 Macachel  
 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  
 Maxteco Ltd  
 Mayhem UK  
 Mazage L. Ltd  
 Mc Shopfronts  
 Mcdonough & Associates  
 McVities  
 Mdm Auto Clinic  
 Med Fine Foods  
 Medecho Ltd  
 Medfoods  
 Medic Animal  
 Medical Services  
 Medisure 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  
 Metropolitan 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 Laundries  
 Mooqa 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 Dryinglin 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 Shopfronts  
 N S B Casements Ltd  
 N. Africa Auto Repair  
 Nacfi Foundation  
 Nad Garage  
 Nadi Park Royal  
 Naga Ltd  
 Nandos  
 National Electrical Wholesale  
 National Grid  
 National Lighting  
 National Rail  
 Nationwide Self Storage Limited  
 Natwest  
 Navid Ltd  
 Neg Earth Ltd  
 Nepal 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 Nausdai  
 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  
 Odif  
 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  
 Oreyxis 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  
Phase3communications  
Philip Maes Fine Chocolates  
Phoenix Automatics  
Phoenix Of Vinyl  
Photobox And Moonpig.com  
Photocopiers Direct  
Pilgrim 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  
Propharma  
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  
Radiocom  
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  
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  
SI-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 Hygiene 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 Groves  
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 Zeik  
Tool Station  
Top Supplies  
Top Tiles  
Top Trenz Ltd  
Tophandys Ltd  
Toppis Tiles  
Torpedo Factory Group  
Total Façade Solutions Limited  
Total Floor Heating  
Touchstone Imports  
Touchstone Worktops Ltd  
Toughglaze (UK) Ltd  
Toughglaze Ltd  
Toucarac 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 Engineers 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  
Virdae 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 *London's Kitchen* 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 devastation 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.

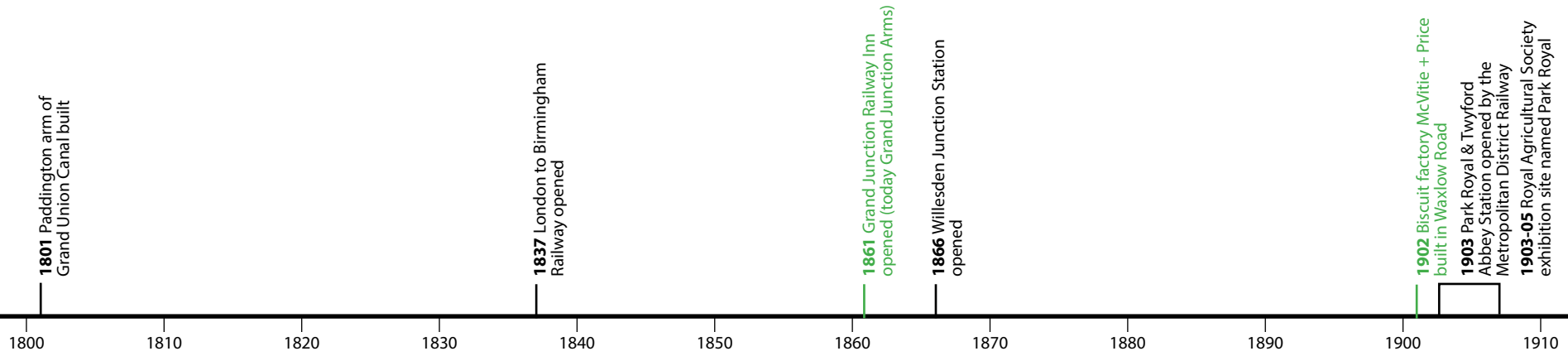
However, by the 1970s Park Royal was facing large-scale industrial restructuring, as well as general industrial decline. Many of the multinational firms, the area's largest employers, chose to relocate, and by the early 1970s around 70 larger firms left Park Royal and the nearby Wembley Estates. Important 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)

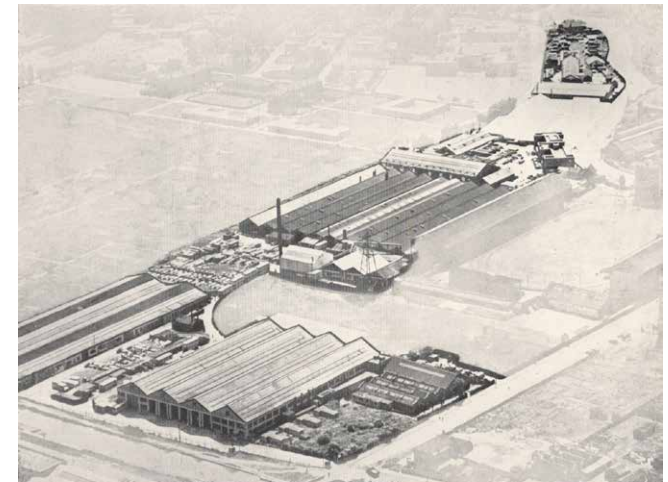
**fig. 3 Park Royal TIME LINE, part 1**

- 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)

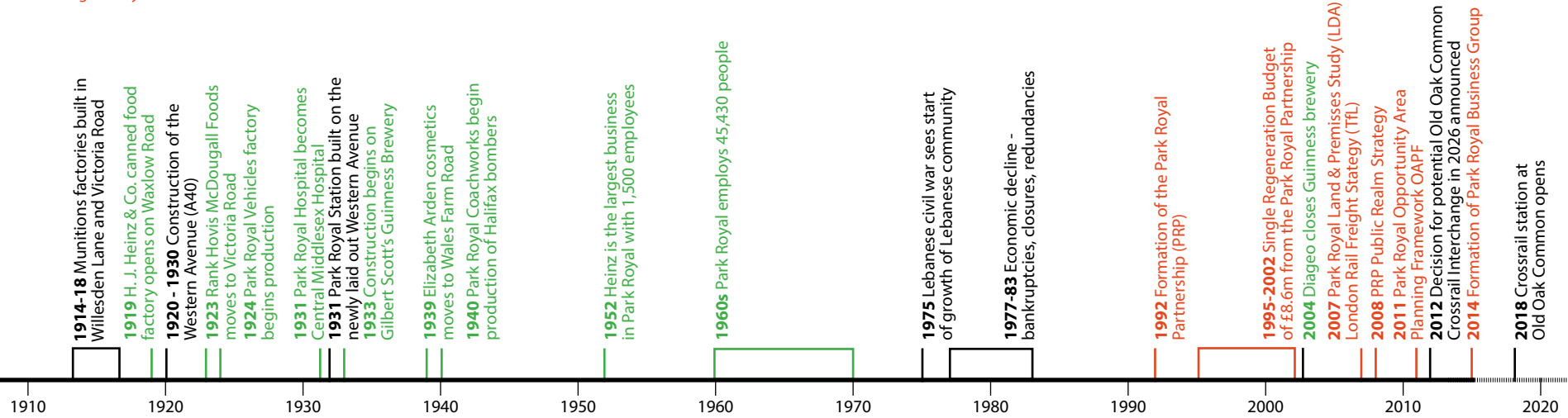


Source: www.prv.org.uk

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



© 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:

### 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*

## 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 multiplied 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.

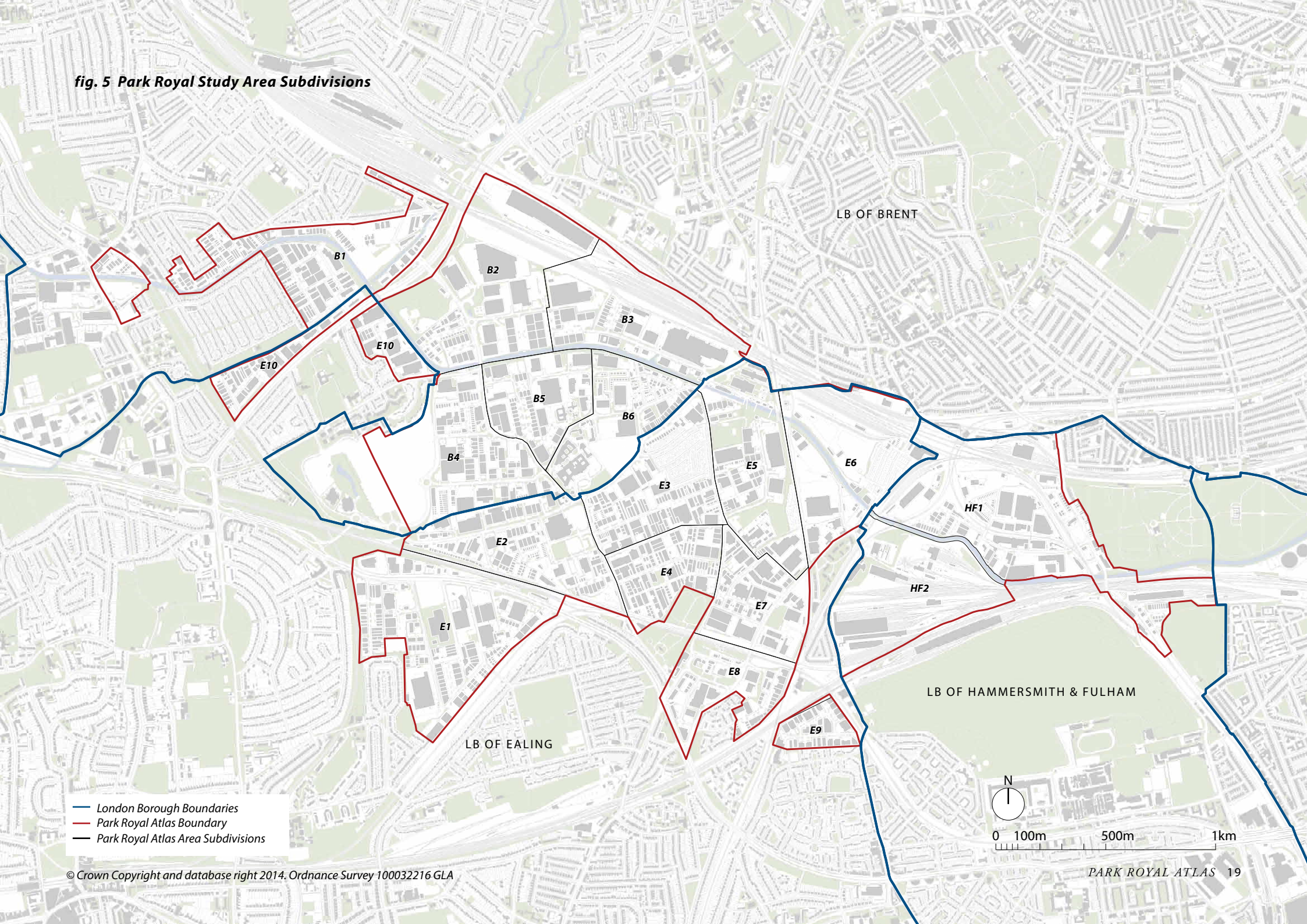
### LEVEL 3 STRUCTURED INTERVIEWS

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

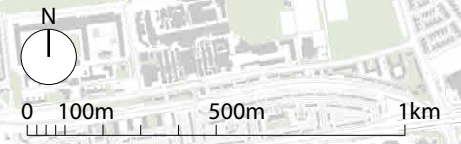
- Type of business (Independent, headquarters, branch or franchise)
- Number of employees
- % of employees from local area (Brent, Ealing, Hammersmith and Fulham)
- Years at location
- Year business established
- Supplier locations
- Customer locations
- Anticipated employee requirements in one year
- 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.

fig. 5 Park Royal Study Area Subdivisions



- London Borough Boundaries
- Park Royal Atlas Boundary
- Park Royal Atlas Area Subdivisions



## 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

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

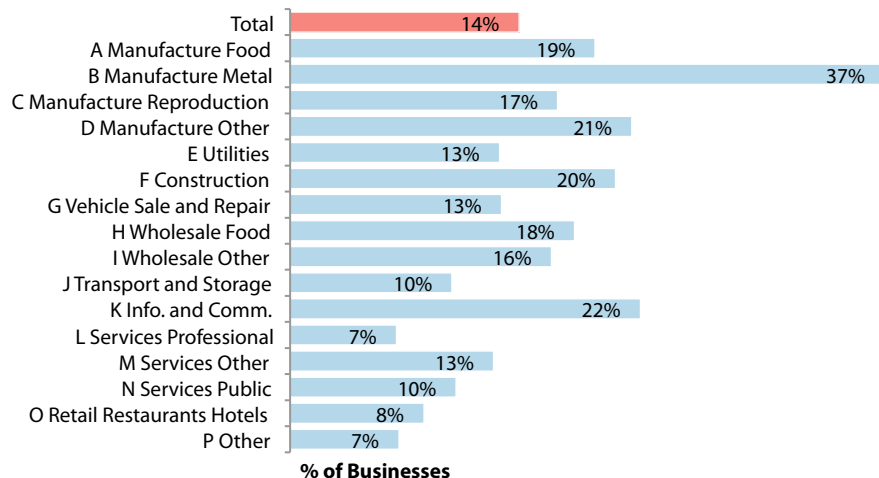
**fig. 7 Space Types**

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

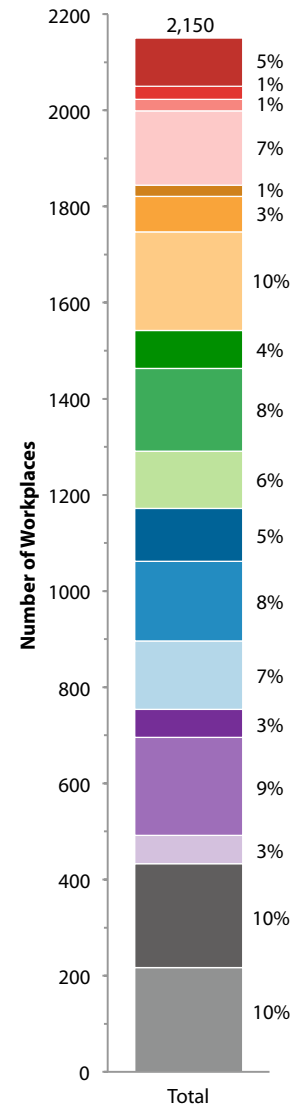


fig. 10 Total Area of Workplaces

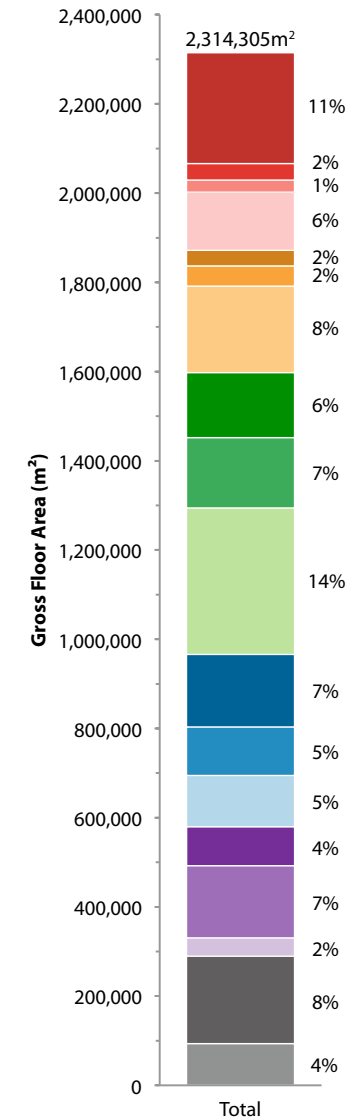
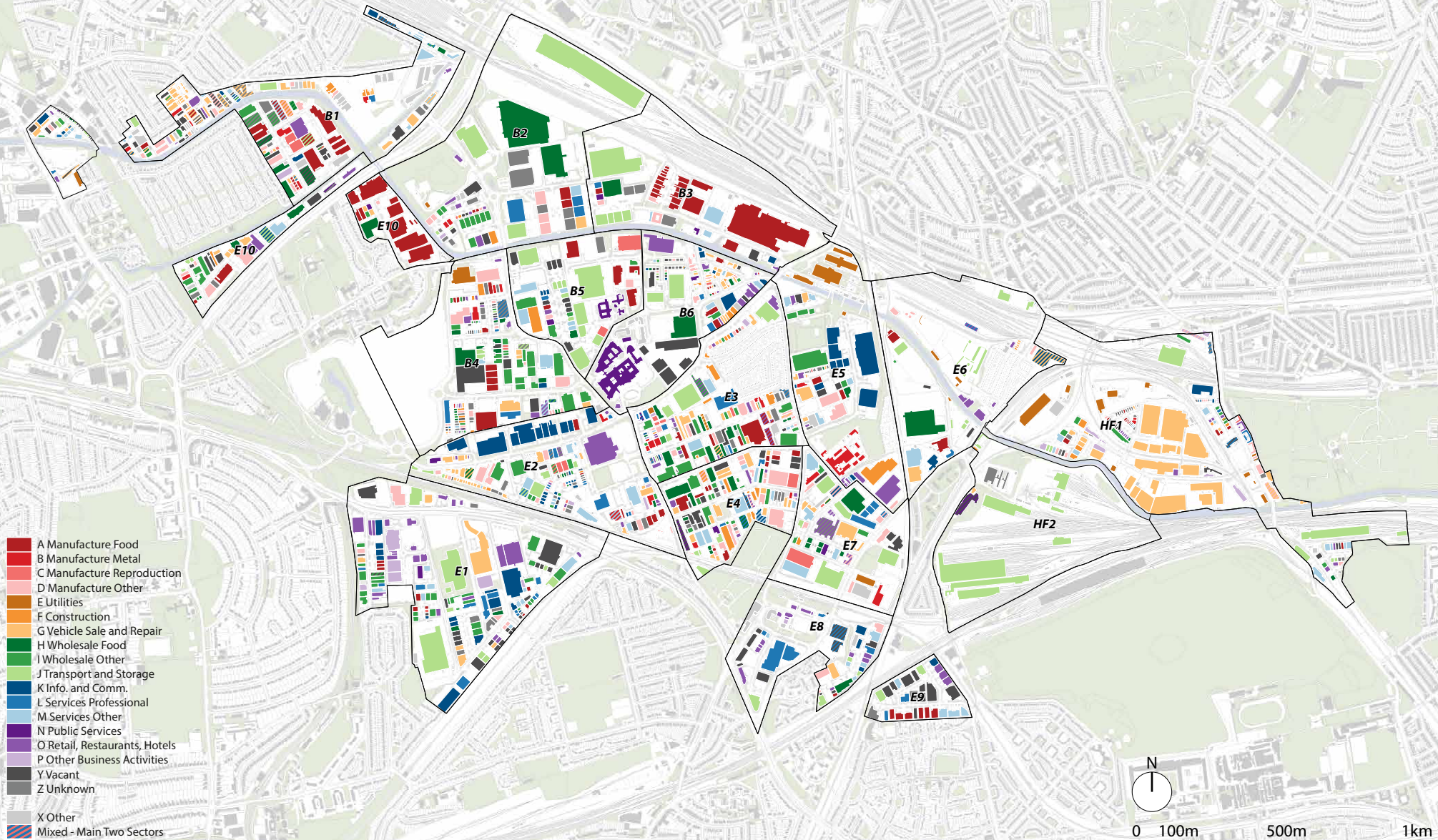




fig. 11 Study Area WORKPLACES BY SECTOR



## 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

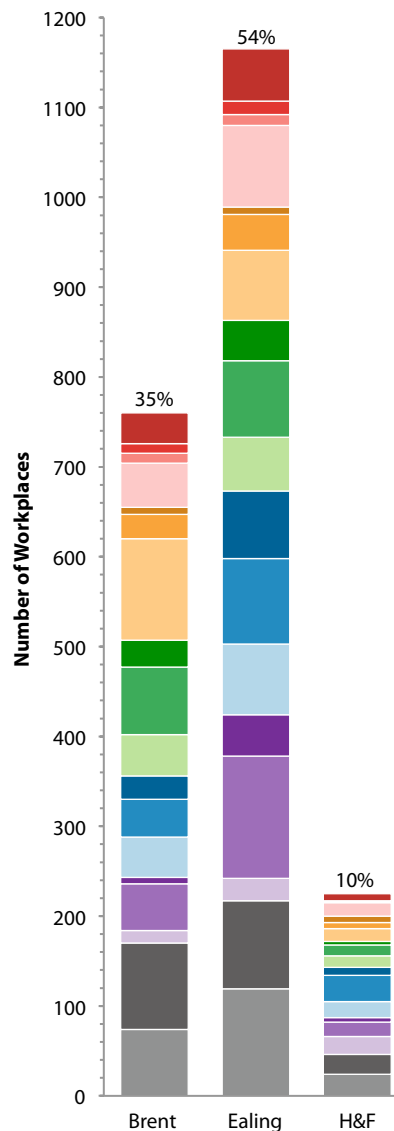
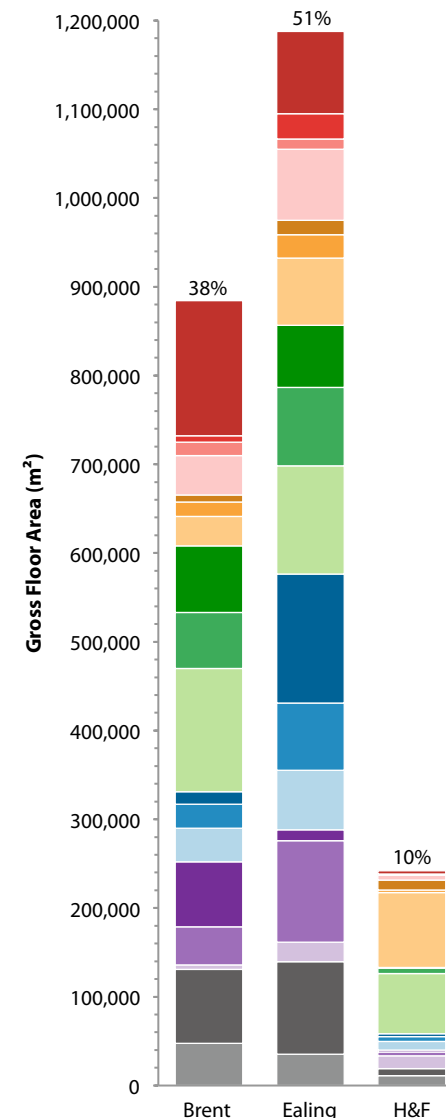


fig. 13 Gross Floor Area by Borough



## 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*

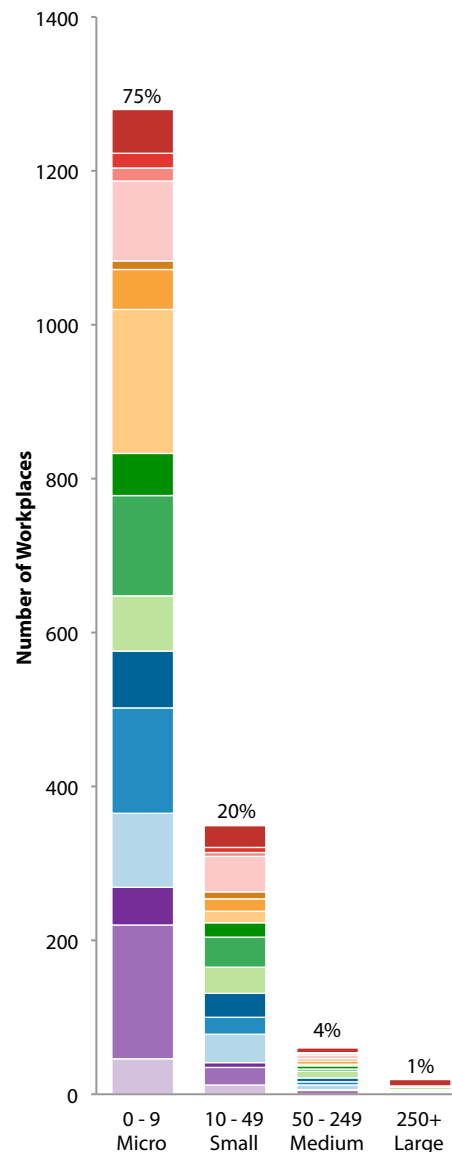
Small businesses make up 20% of all workplaces, while only 4% of workplaces are medium-sized businesses. The 1% of workplaces that are large businesses is made up of only 19 businesses. These include a number of large food manufacturers like Bakkavor, a ready meal manufacturer, and several industrial 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.

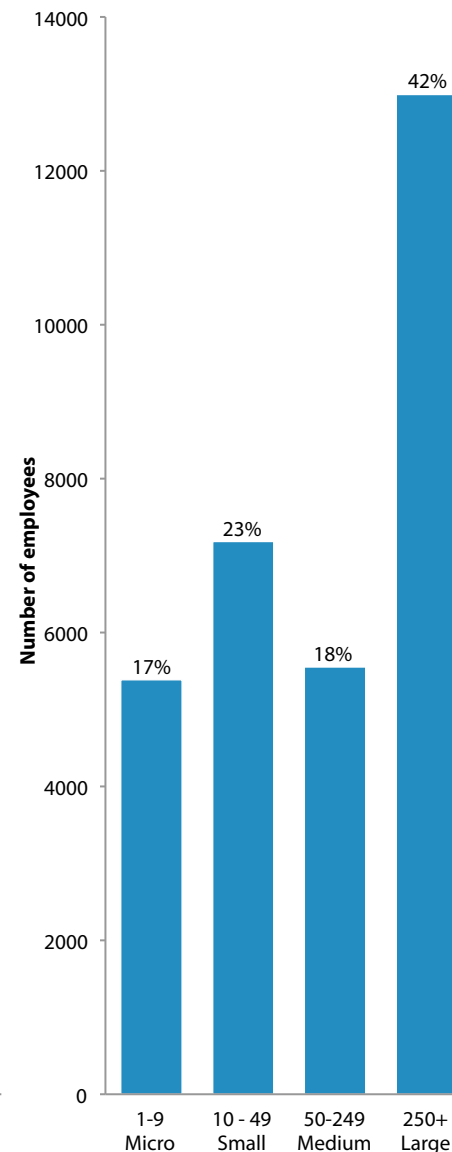
*An estimated 31,000 people work in Park Royal*



**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

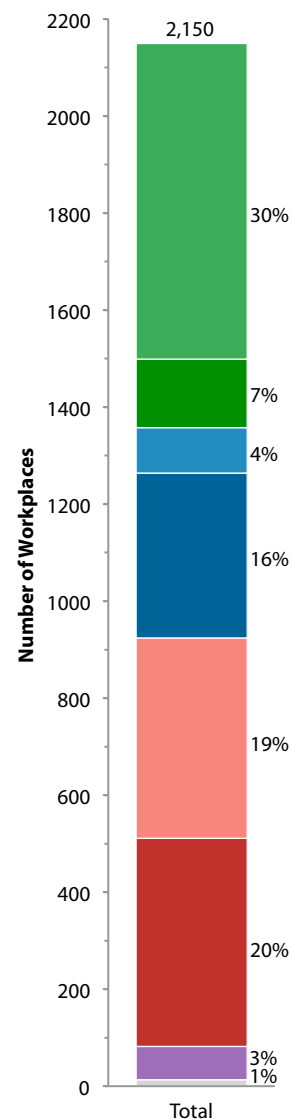


fig. 17 Space Type Areas

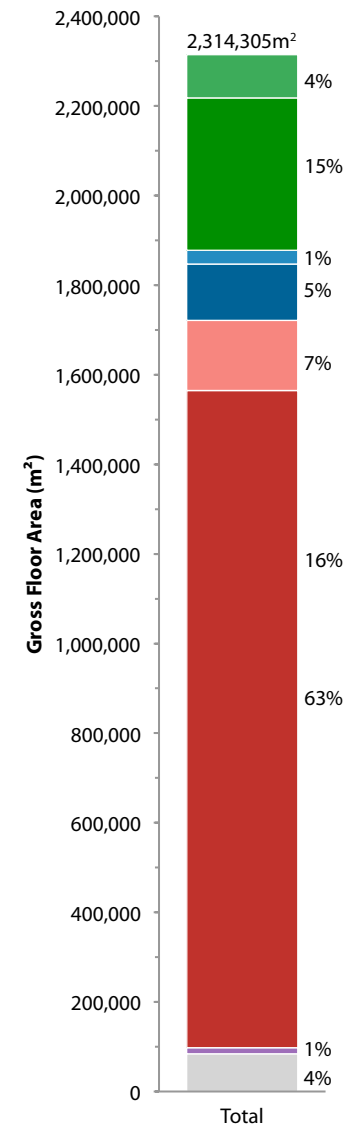
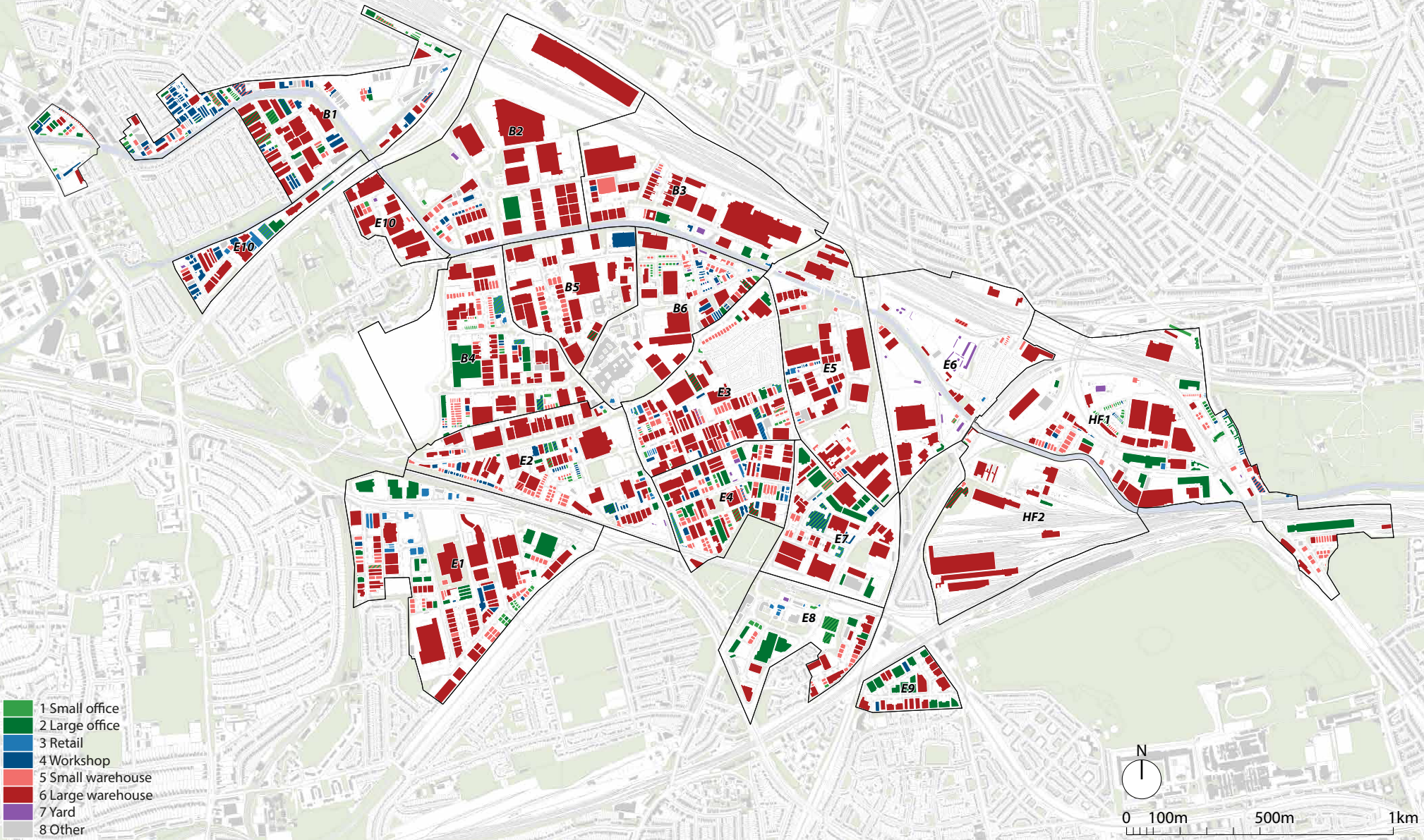
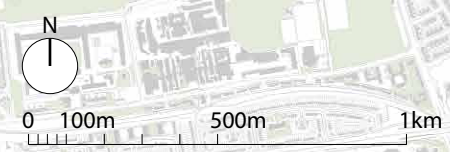


fig. 18 Study Area Space Types



- 1 Small office
- 2 Large office
- 3 Retail
- 4 Workshop
- 5 Small warehouse
- 6 Large warehouse
- 7 Yard
- 8 Other

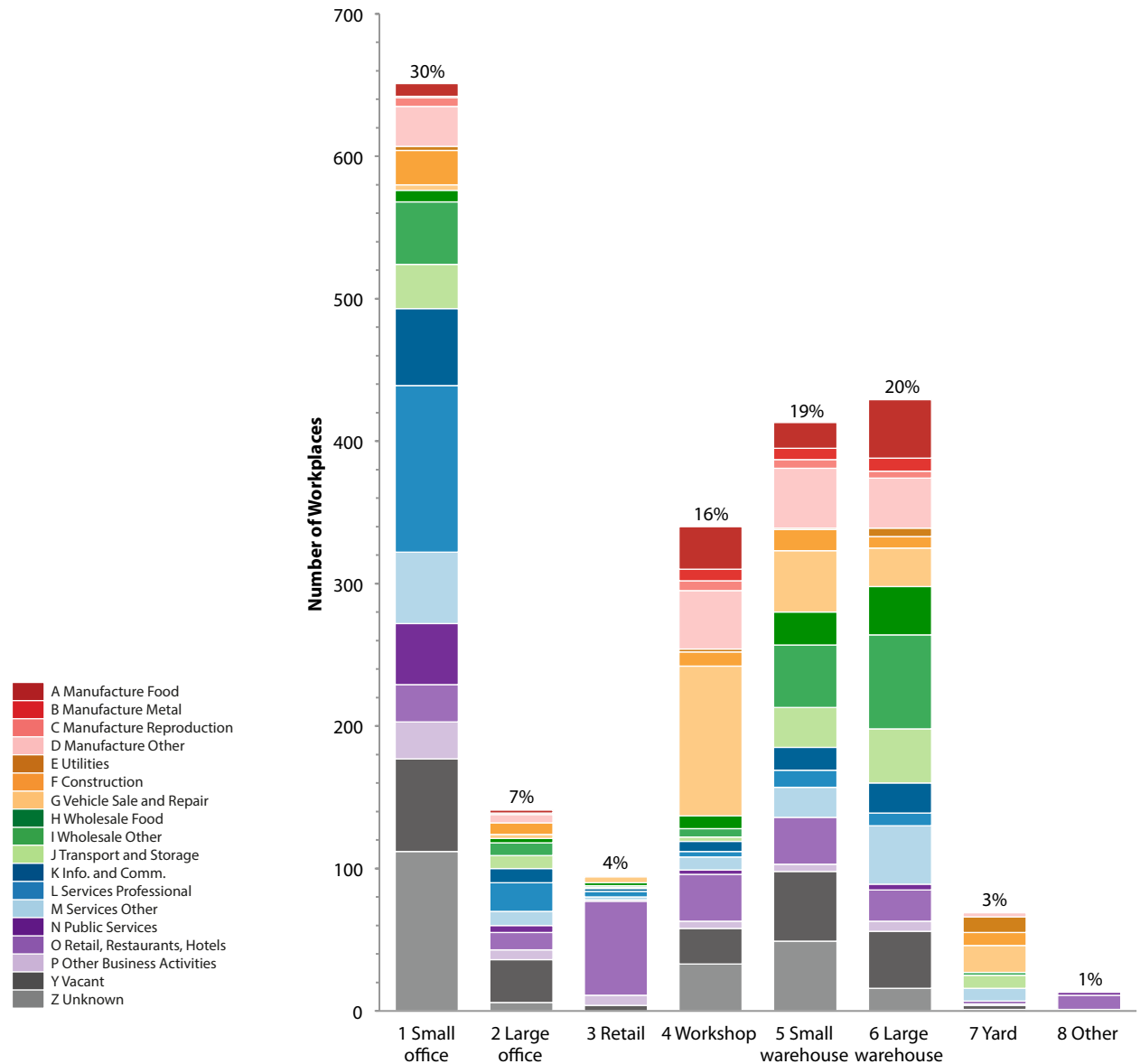


## SPACE TYPES BY SECTOR

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

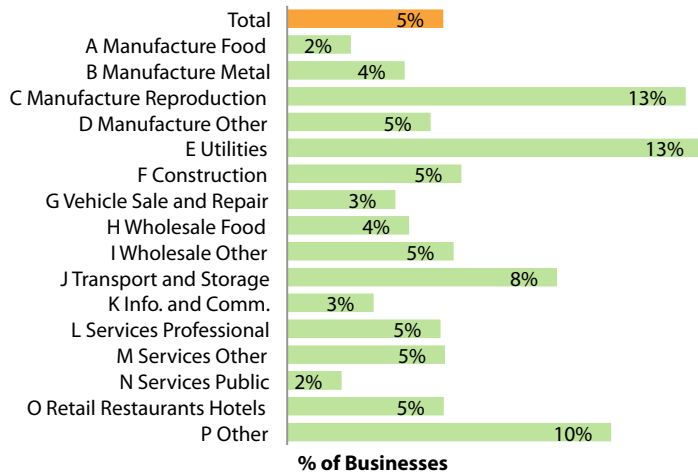
While the vast majority of workplaces are sole occupiers of their premises, 84 of the 1717 businesses (5%) in Park Royal share their premises with another workplace (fig. 20). However, this number does not include the sharing of buildings that have been subdivided into multiple premises.

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.

Shared premises were rare amongst food manufacturers, 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

*2% of food manufacturers share their premises*

**fig. 20 Proportion of Businesses Sharing Premises**



# SURVEY AREAS





# AREAS B1 E10

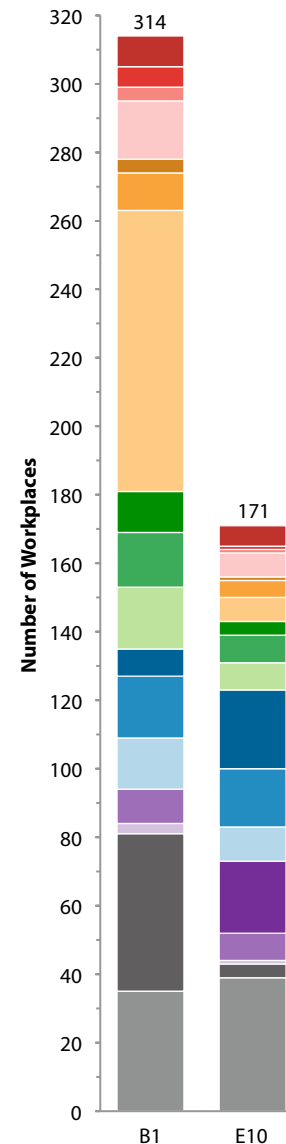


Otherwise known as Alperton, *AREA B1* forms the north-west corner of Park Royal. Bounded by the river Brent and North Circular (A406), the area has the smallest average gross floor area per workplace in Park Royal, around 500m<sup>2</sup>, compared to an average of 1,000m<sup>2</sup>. By far the highest 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.

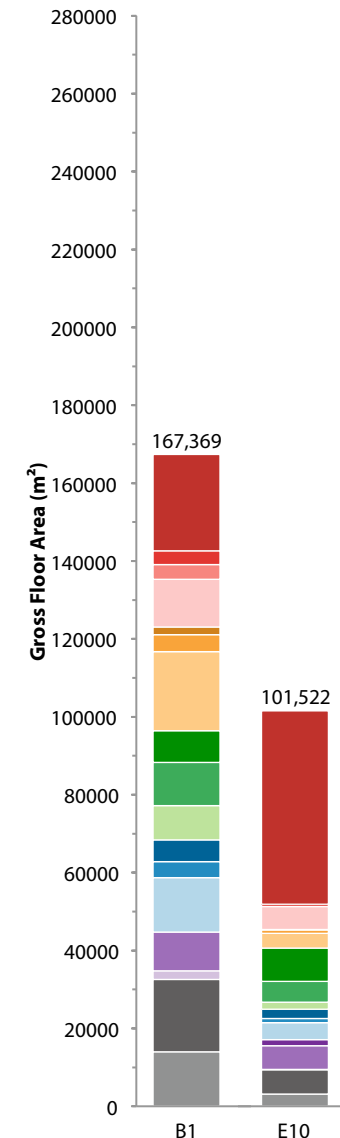
*AREA E10* is located along the North Circular. The eastern side is composed of large warehouse units - modest but well-designed brick buildings - for the most part occupied by large food manufacturers. Facing onto the North Circular are a row of large buildings, including a hotel, several retail stores 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**

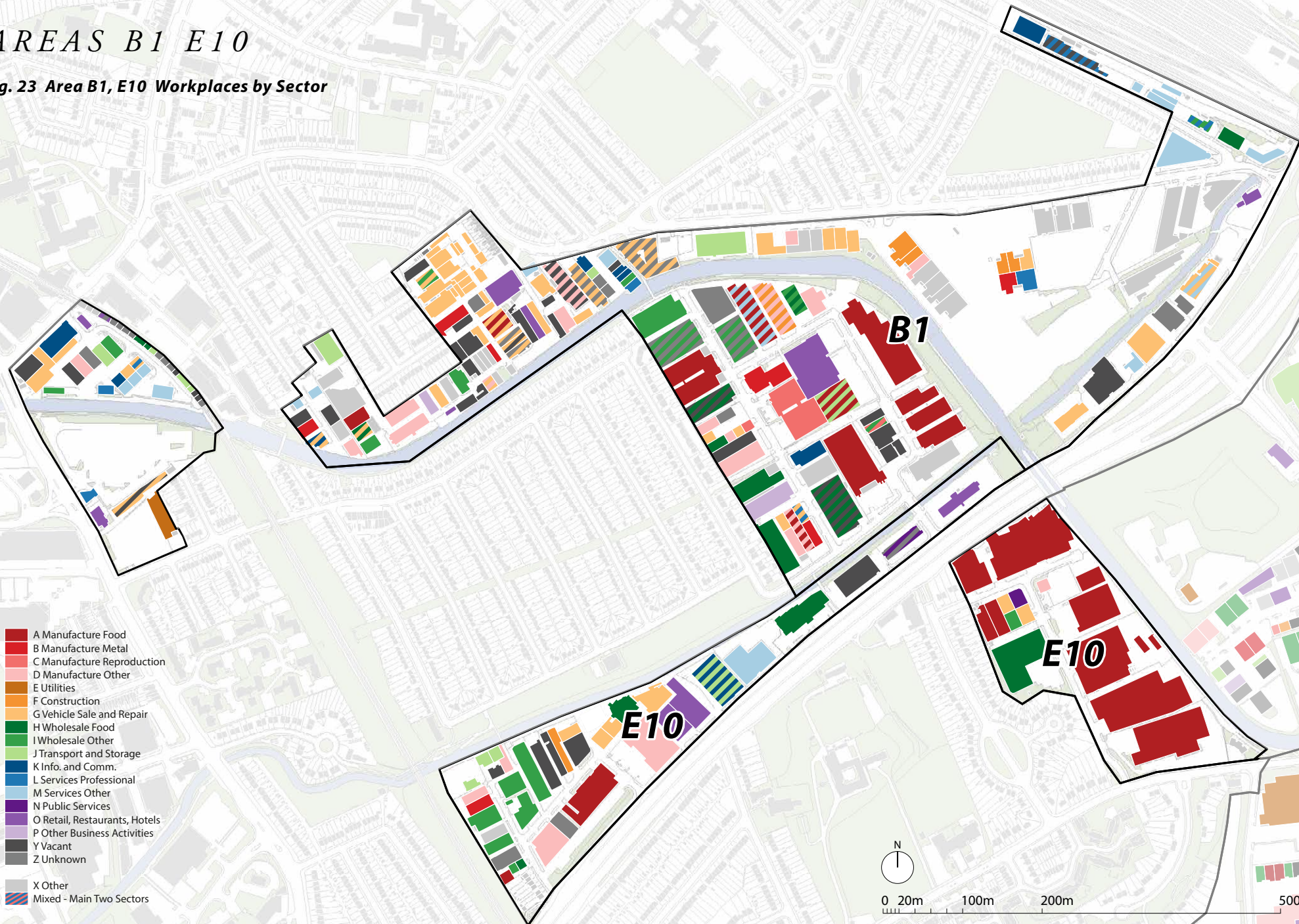


**fig. 22 Gross Floor Area by Survey Area**



# AREAS B1 E10

fig. 23 Area B1, E10 Workplaces by Sector



- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown
- X Other
- Mixed - Main Two Sectors



AREAS B1 E10



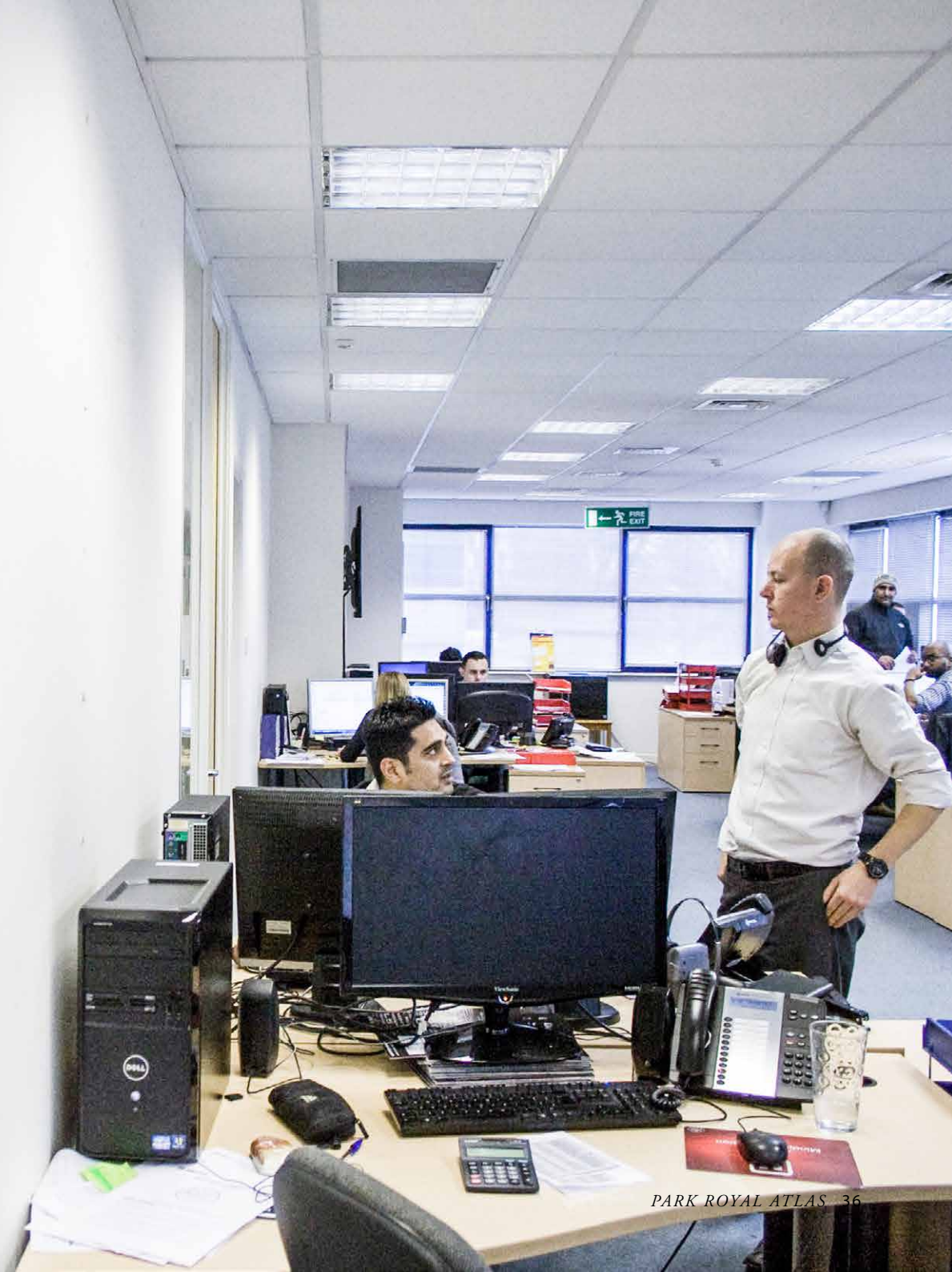
## CASE STUDY QBS Software

### 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

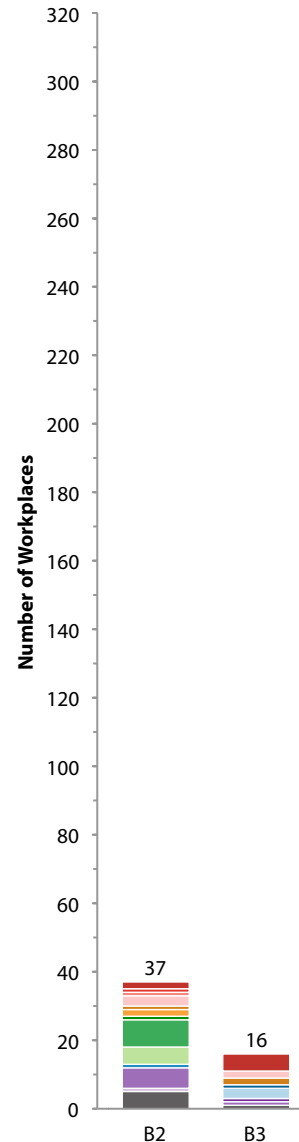


Sandwiched between the Grand Union Canal to the south and the Willesden / Brent train sidings to the north, *AREA B2* is dominated by large private business parks, Premier Park being the largest. Other large workplaces include a major Royal Mail distribution centre. Wholesale, transport and storage are 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.

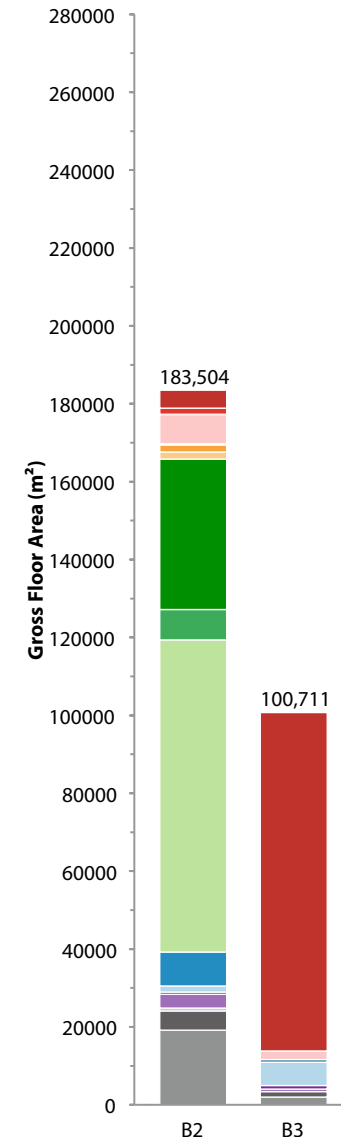
Entering *AREA B3* via Acton Lane you come across the Grand Junction Arms - one of the few pubs in Park Royal - that has been on its current site since 1861. Just north of the Canal is one of Park Royal's oldest and largest manufacturers, biscuit maker McVitie's, which has been based in Park Royal since 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





## AREAS B2 B3

### 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. McVitie'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 M<sup>2</sup> GROSS FLOOR AREA**



## AREAS B2 B3



### 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 M<sup>2</sup> 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, trailers, metal engineers and joiners, which in many cases have been handed down from generation to generation.



fig. 27 Number of Workplaces by Survey Area

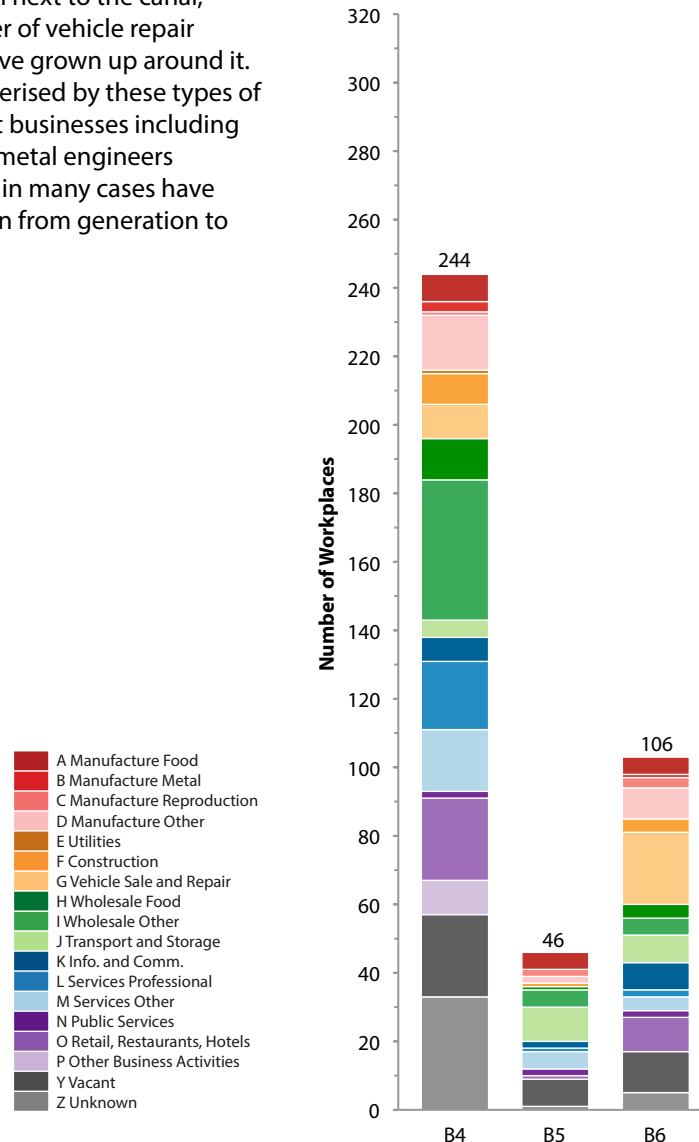
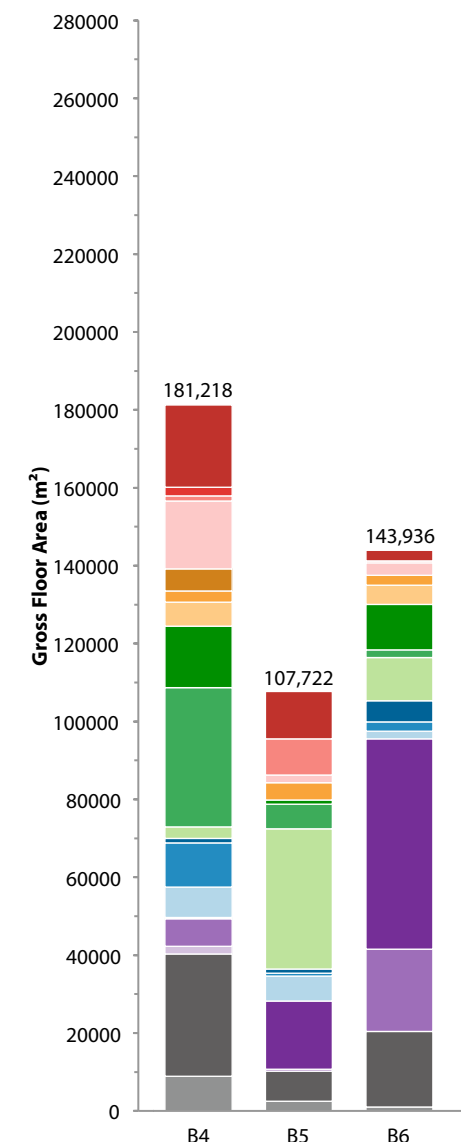
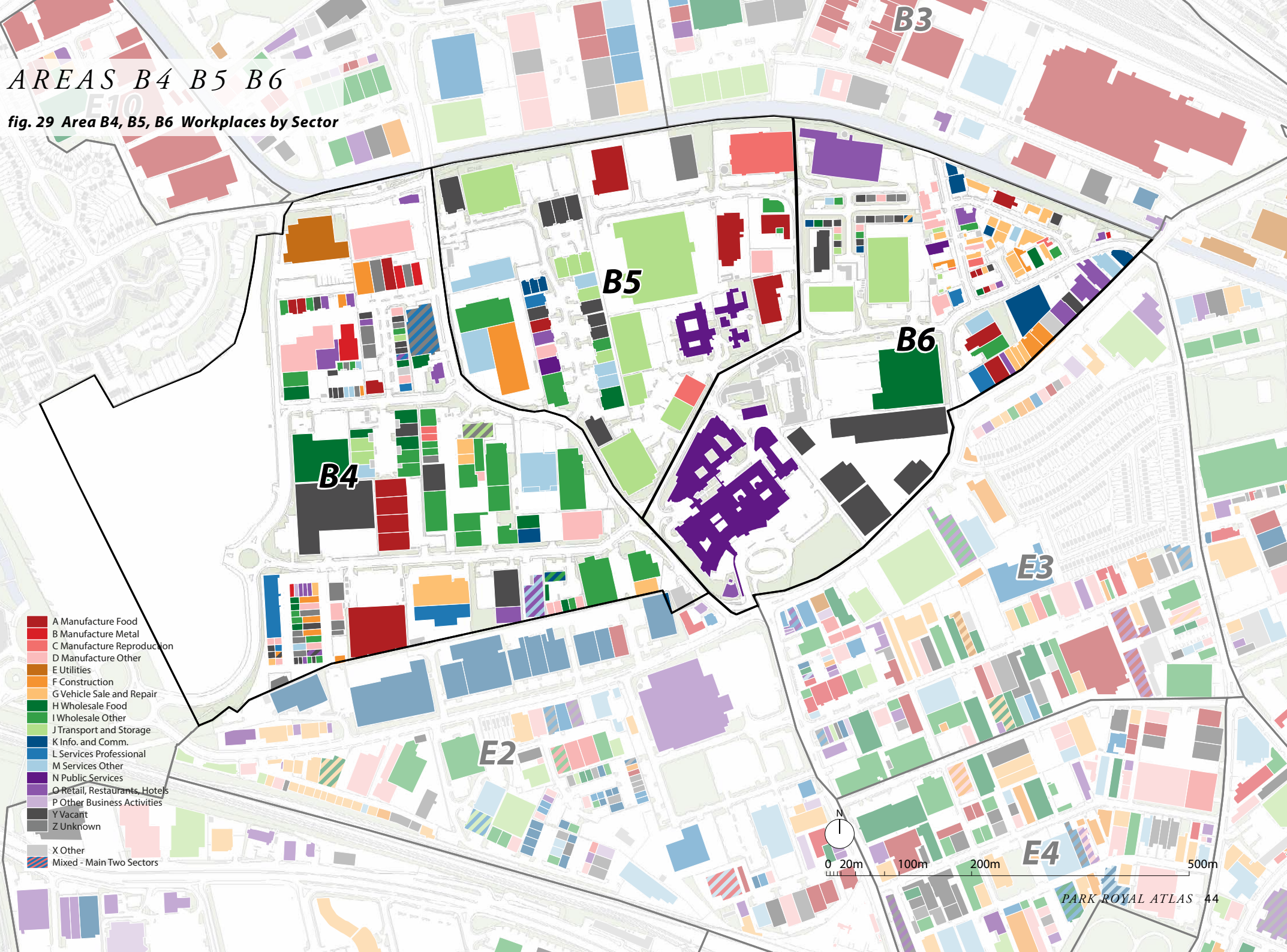


fig. 28 Gross Floor Area by Survey Area



# AREAS B4 B5 B6

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



- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown
- X Other
- ▨ Mixed - Main Two Sectors



# 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 Ukrainian 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 M<sup>2</sup> GROSS FLOOR AREA



## AREAS B4 B5 B6

### 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.

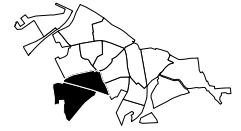
DATA    2 EMPLOYEES  
IN BUSINESS AND ON SITE SINCE 2014



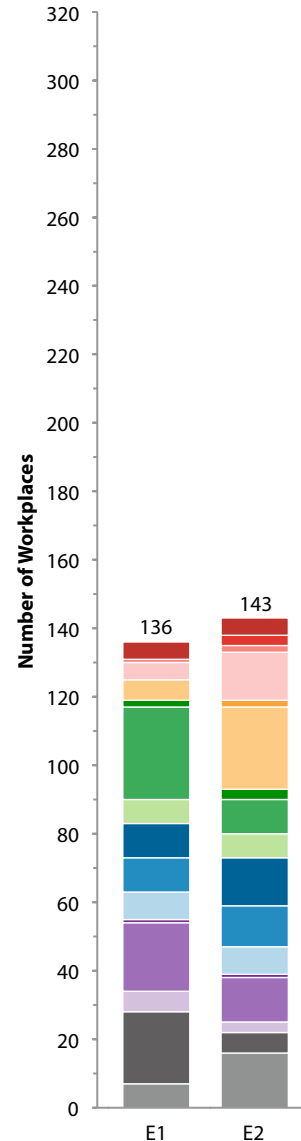
# AREAS E1 E2

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.

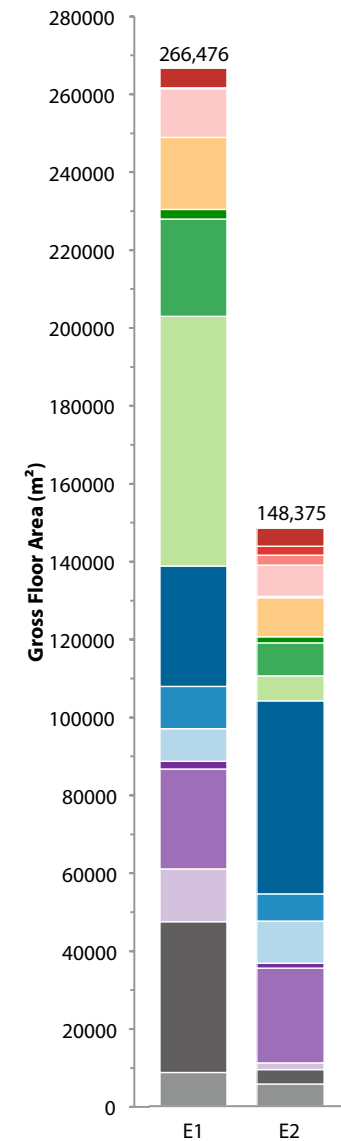


**fig. 30 Number of Workplaces by Survey Area**



- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown

**fig. 31 Gross Floor Area by Survey Area**





# AREAS E1 E2

fig. 32 Areas E1, E2 Workplaces by Sector

- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown
- X Other
- Mixed - Main Two Sectors



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 M<sup>2</sup> ESTIMATED FLOOR AREA**  
**£800,000 ANNUAL TURNOVER**



## 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 overseas 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 M<sup>2</sup> GROSS FLOOR AREA

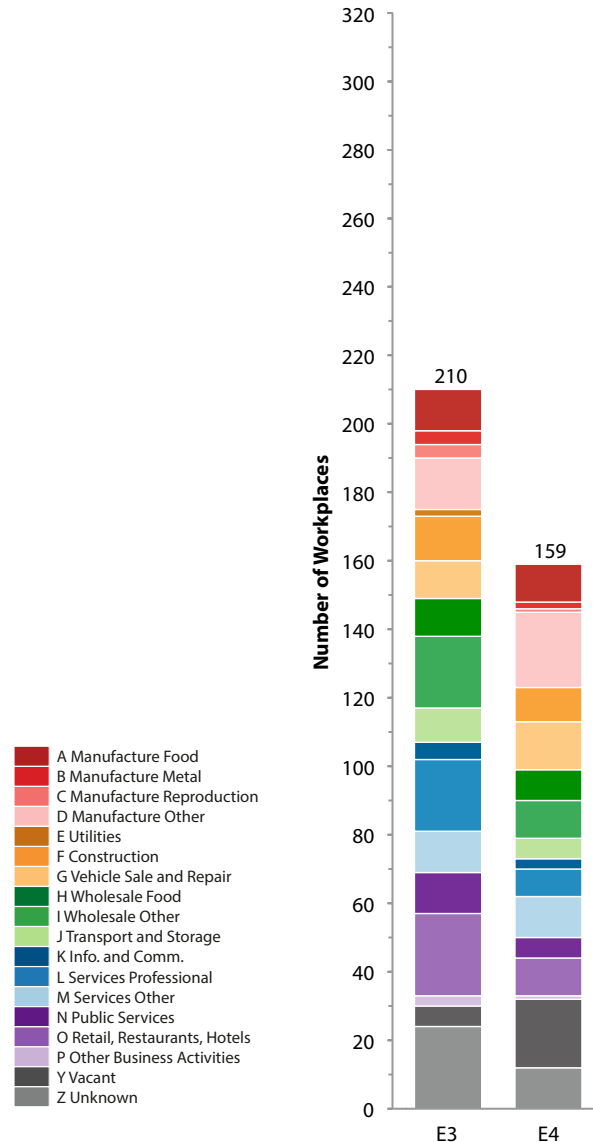
# AREAS E3 E4

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.

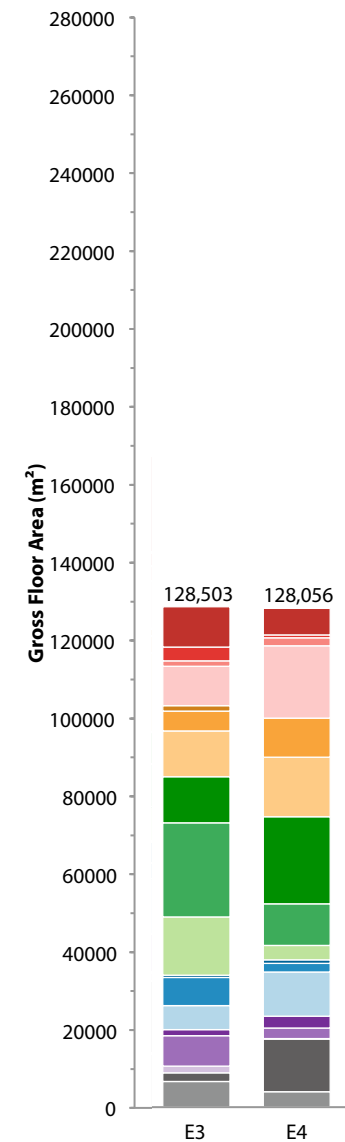
However, the area is also one of the most vibrant in Park Royal. The area hosts a number of Lebanese cafés and bakeries that have become important meeting places for the local community. The area is characterised by an ethnically diverse business population, with a predominance of small independent businesses 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**

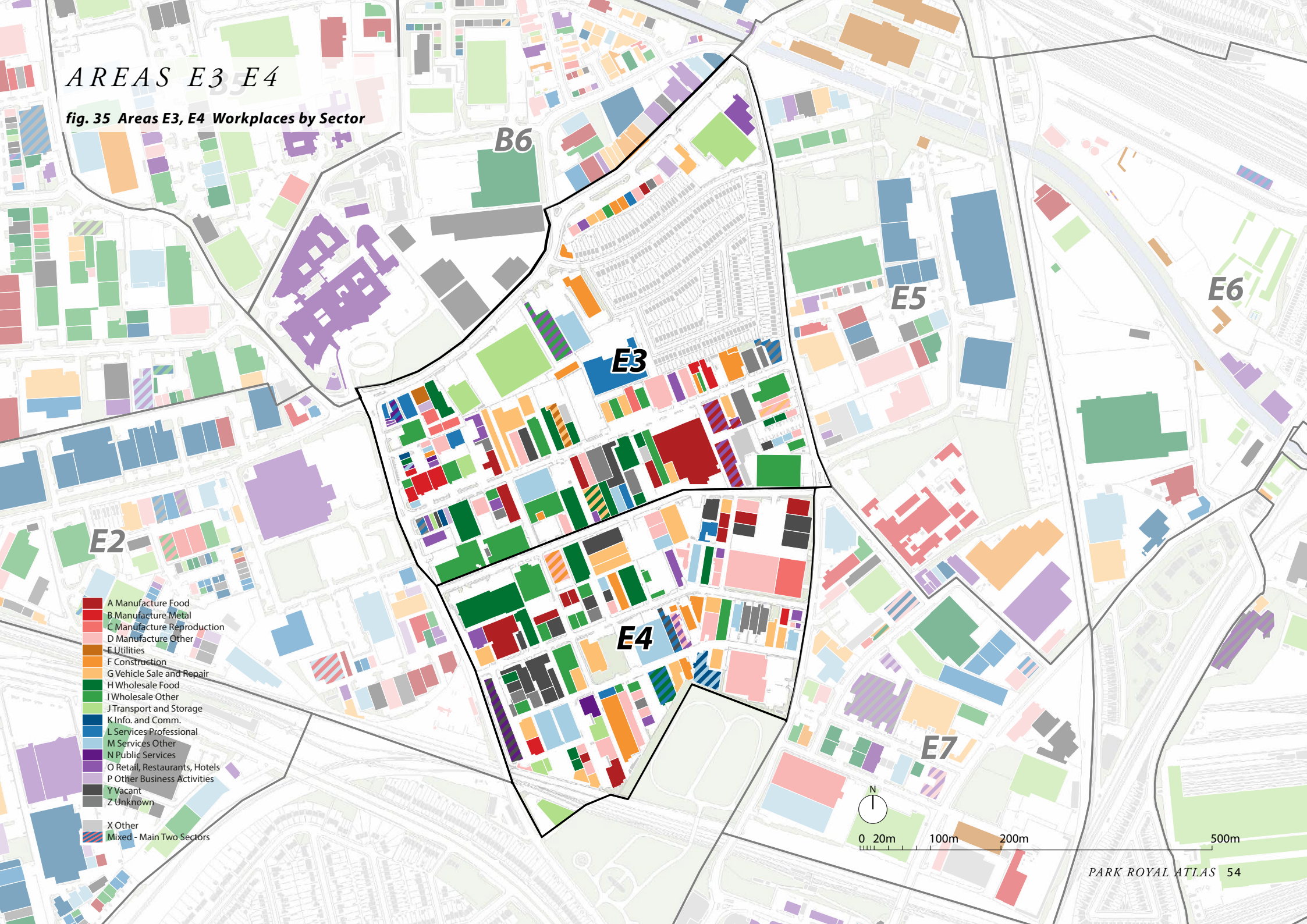


**fig. 34 Gross Floor Area by Survey Area**

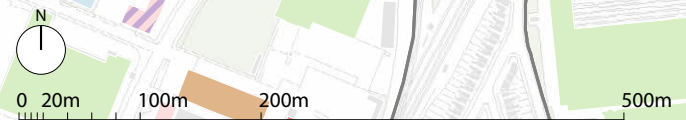


# AREAS E3 E4

fig. 35 Areas E3, E4 Workplaces by Sector

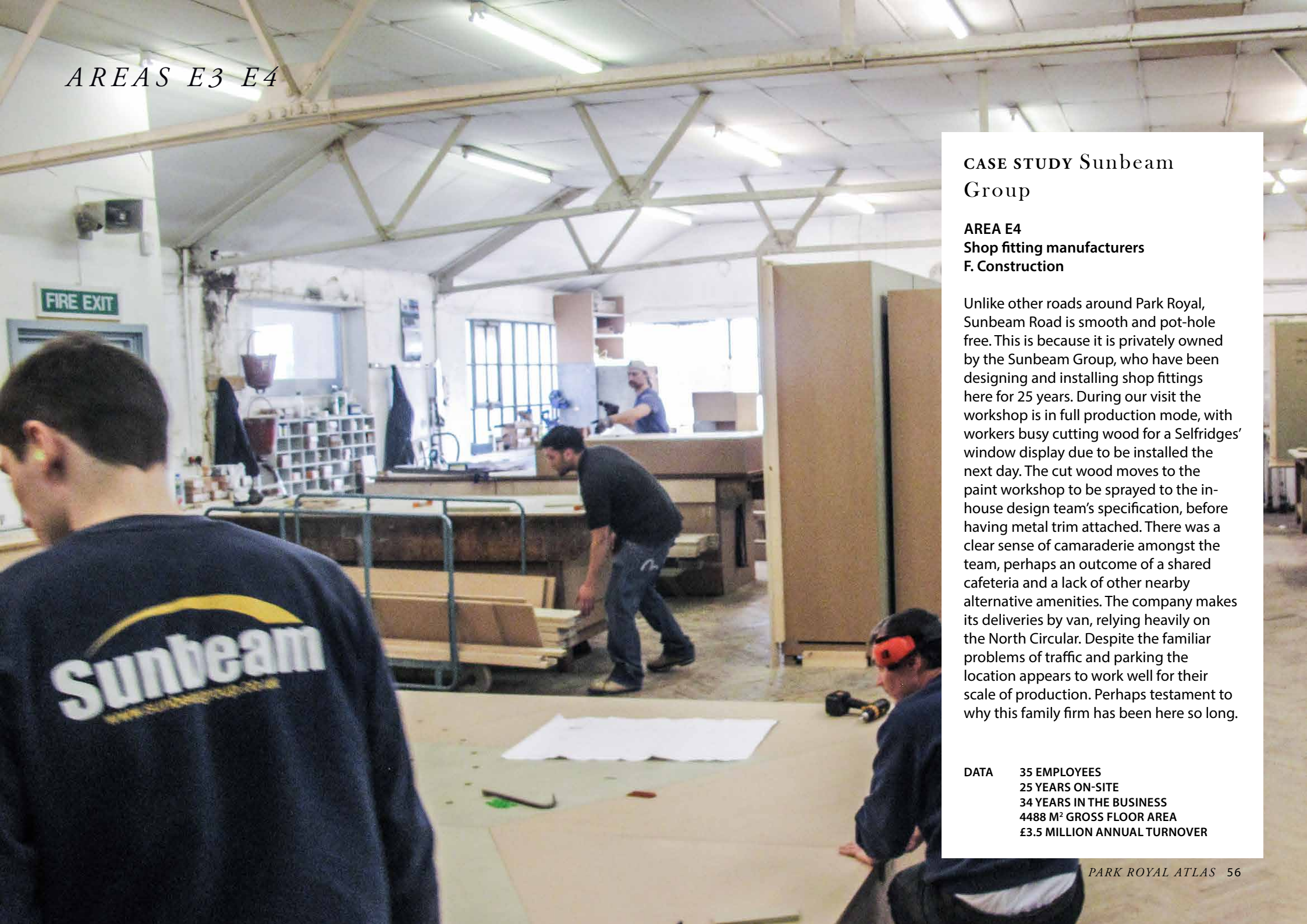


- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown
- X Other
- Mixed - Main Two Sectors



# 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<sup>2</sup> 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 M<sup>2</sup> GROSS FLOOR AREA

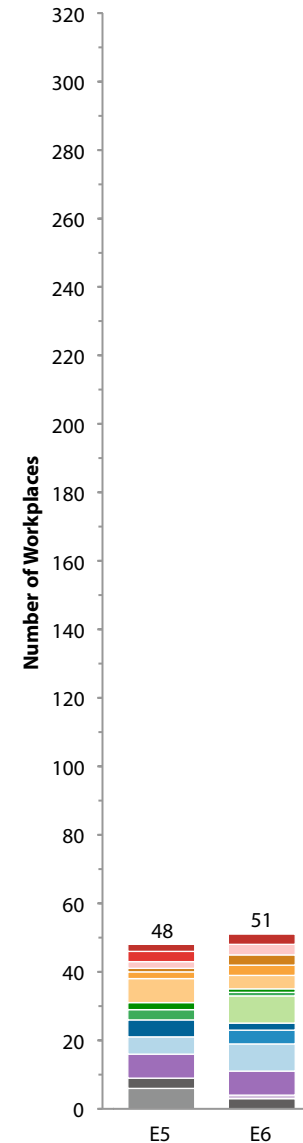
# AREAS E5 E6

AREA E5, east of North Acton Road, is characterised by a relatively low number of workplaces that nevertheless occupy a comparatively 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.

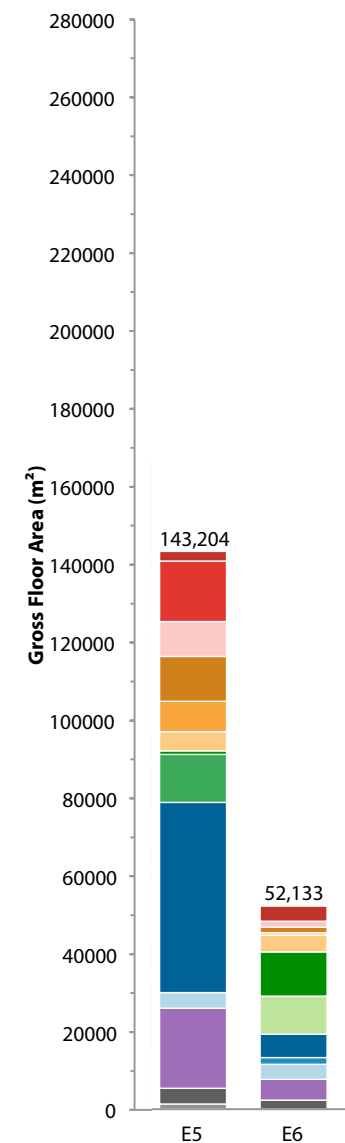


**fig. 36 Number of Workplaces by Survey Area**



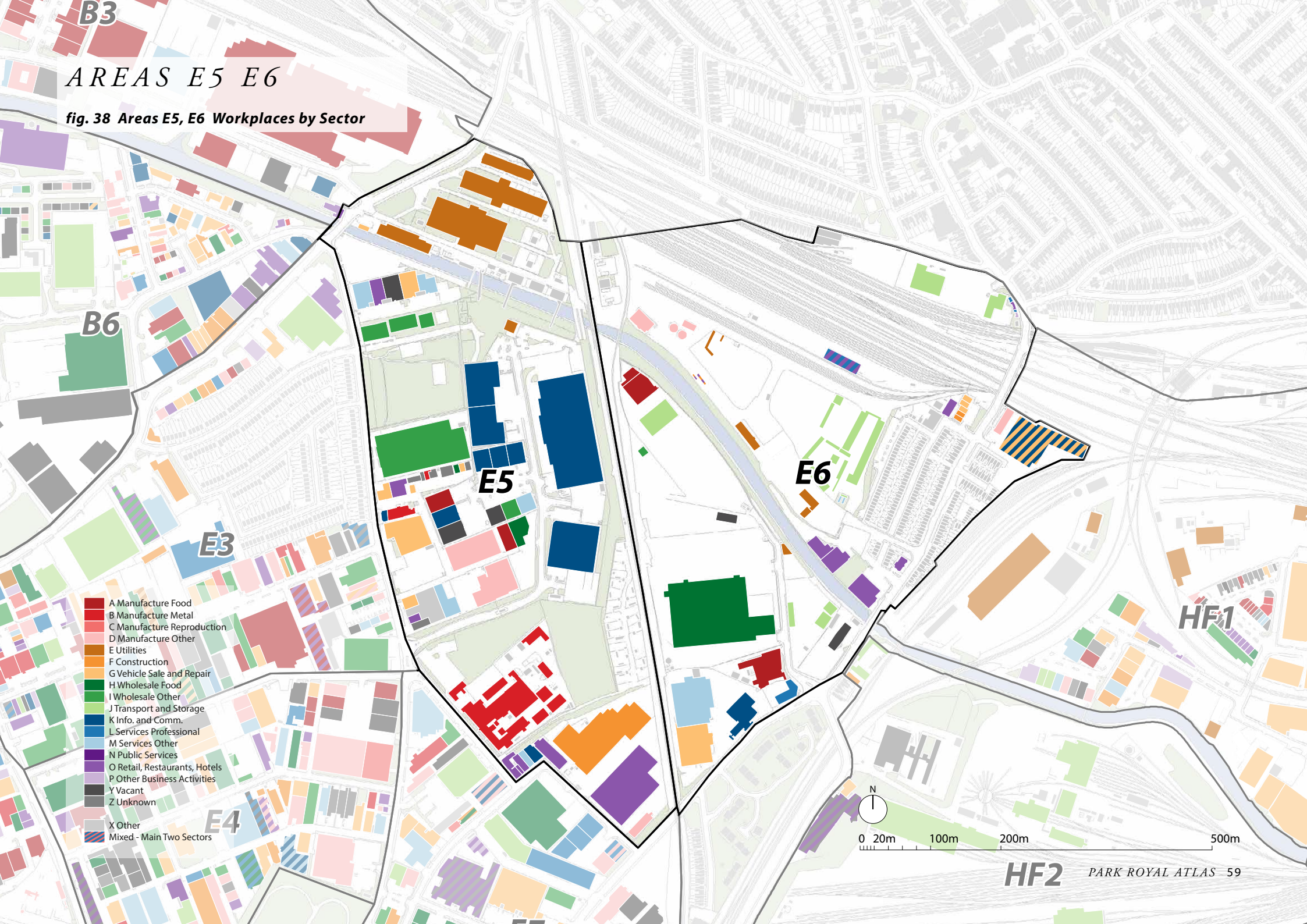
- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown

**fig. 37 Gross Floor Area by Survey Area**



# AREAS E5 E6

fig. 38 Areas E5, E6 Workplaces by Sector



B6

E3

E4

E5

E6

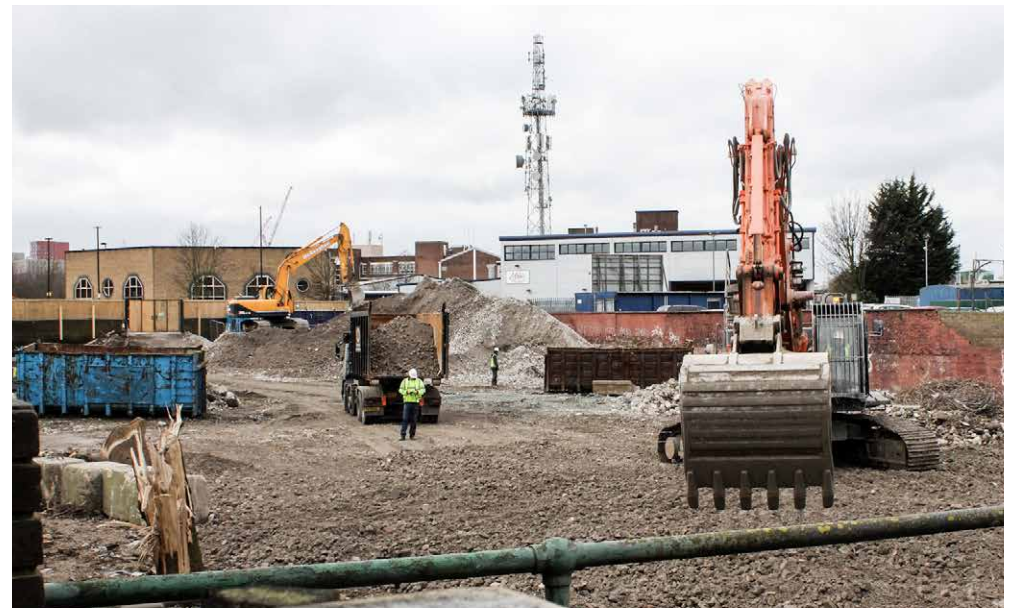
HF1

HF2

- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown
- X Other
- Mixed - Main Two Sectors



AREAS E5 E6



# 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.

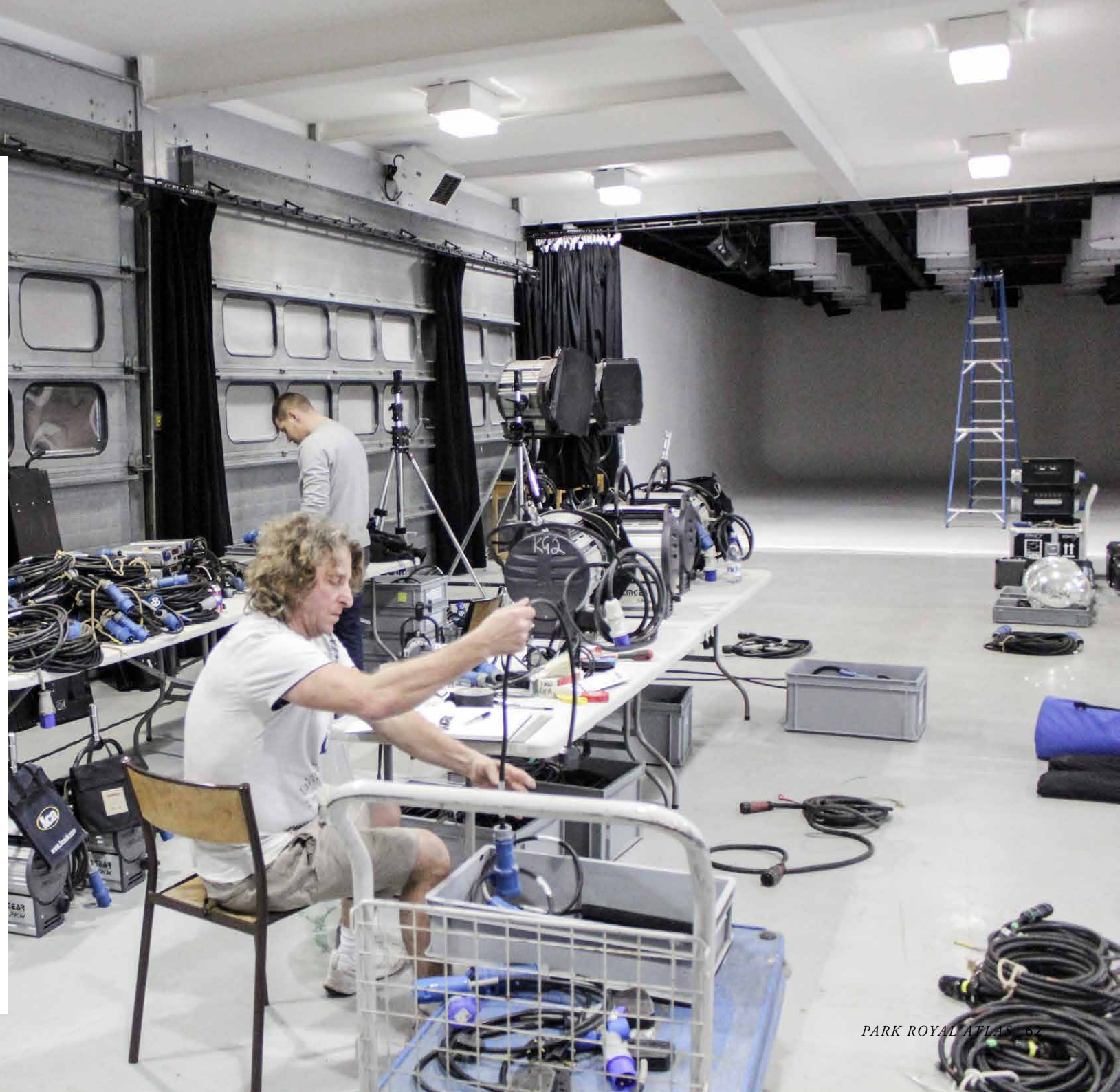
**DATA**    **13 EMPLOYEES**  
**12 YEARS IN BUSINESS**  
**12 YEARS ON SITE**

## 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 M<sup>2</sup> GROSS FLOOR SPACE**



# AREAS E7 E8 E9



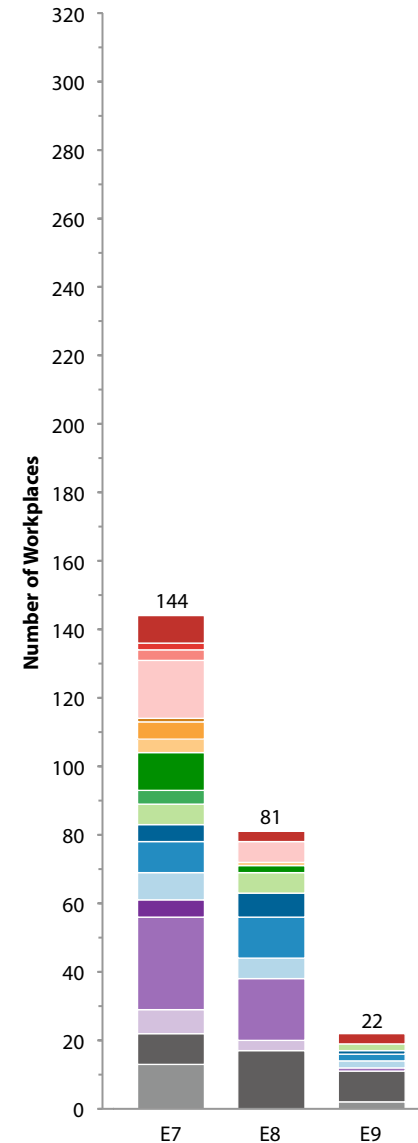
**AREA E7**, next to North Acton tube station, has one of the densest collection of workplaces in Park Royal. Two business centres accommodate a large number of micro-businesses, many of them in the food manufacturing and wholesale sectors. Production ranges from Baklava and roasted nuts, to raw detox 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, immortalised as the "vanity factory" in his 1977 song "I'm Not Angry".

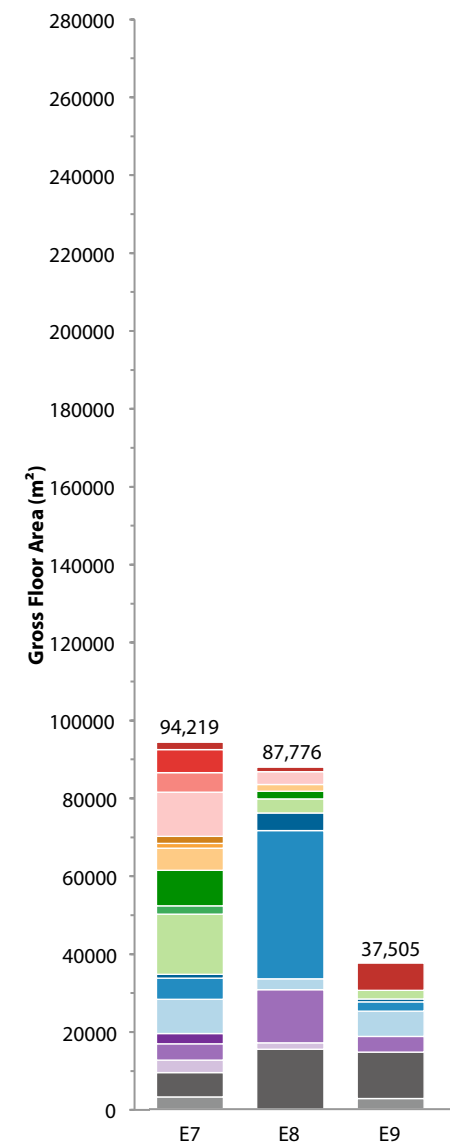
**AREA E9** is cut off from the rest of Park Royal by railway lines and has limited road and pedestrian access. The area features a number of attractive industrial brick buildings from the 1920s and 30s, mainly workshops and small warehouses with offices, as well as some more recent anonymous office 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**

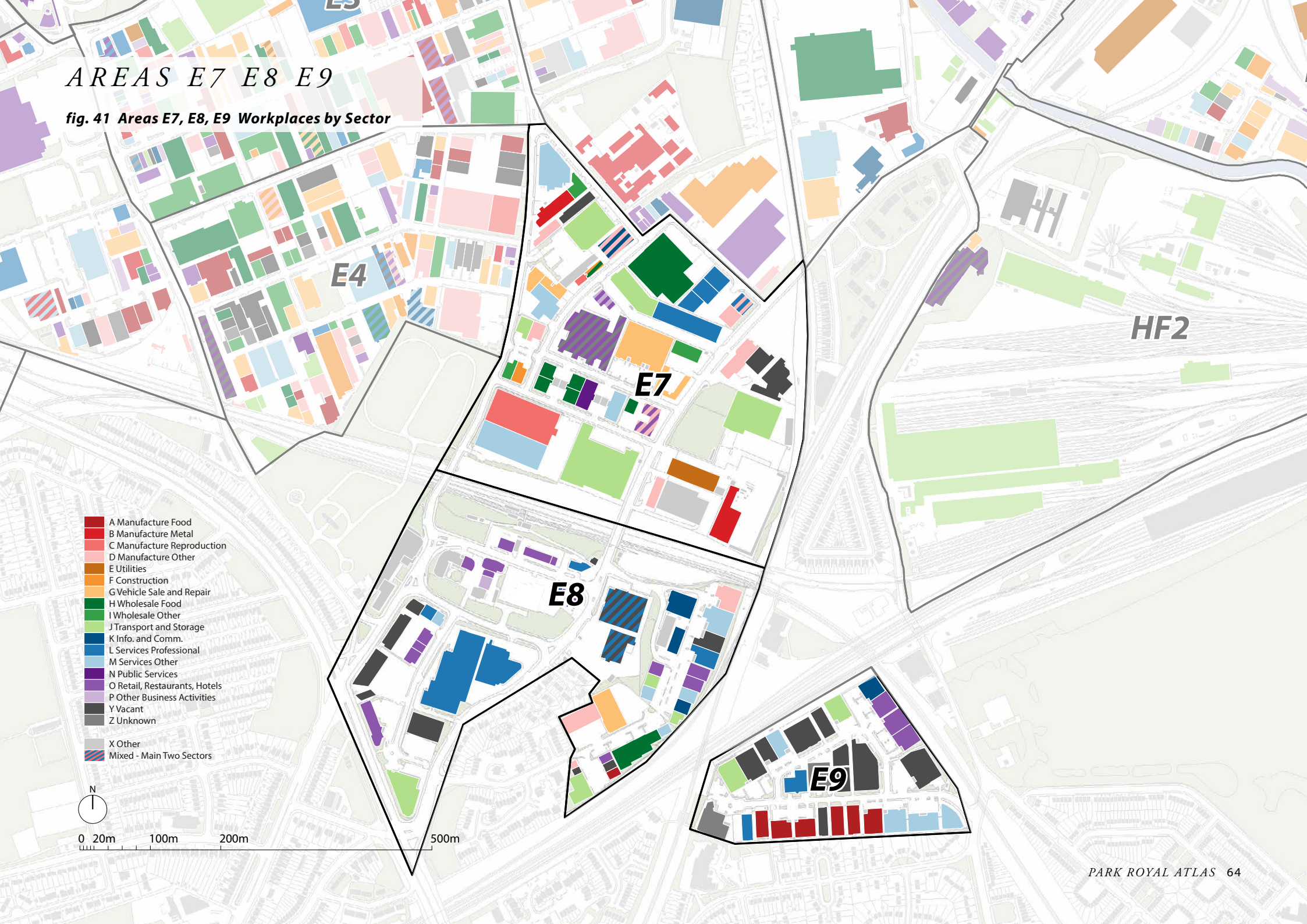


**fig. 40 Gross Floor Area by Survey Area**



# AREAS E7 E8 E9

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



- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown
- X Other
- ■ Mixed - Main Two Sectors





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 M<sup>2</sup> 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 M<sup>2</sup> 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 invisible 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 M<sup>2</sup> GROSS FLOOR AREA



# AREAS HF1 HF2

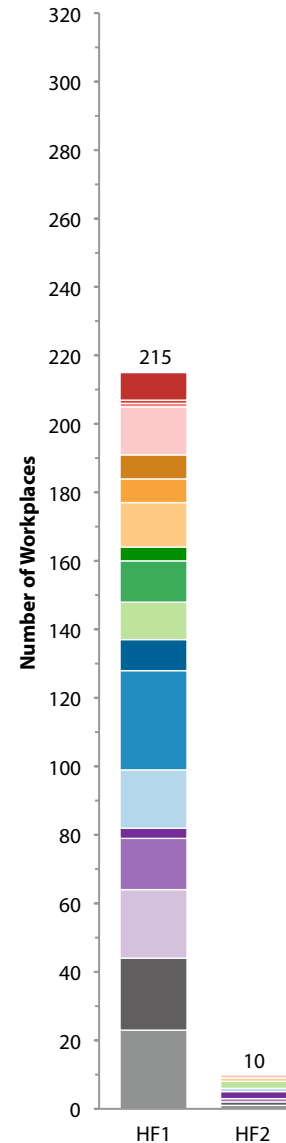


Bounded by railway lines to the north, east and west, as well as the Grand Union Canal to the south, *AREA HF1* is one of the most isolated areas in Park Royal. Access is limited to two road bridges at either end of Scrubs Lane (Mitre Bridge being the most attractive) as well as a particularly unwelcoming 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.

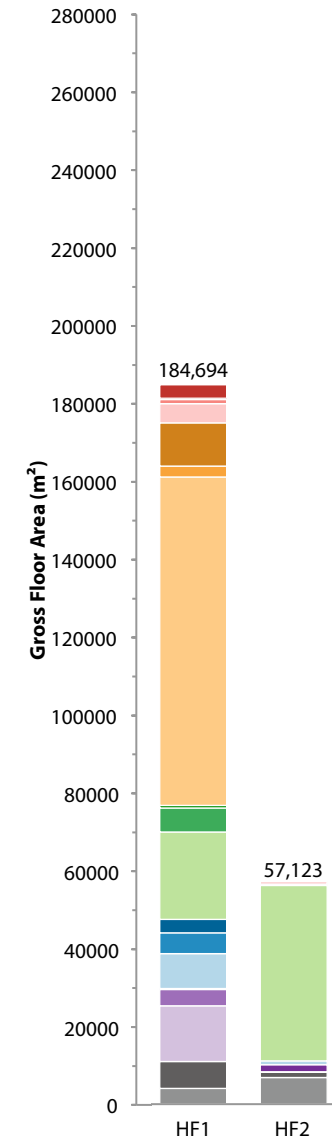
*AREA HF2* is dominated by a two large rail depots operated by Crossrail and Great Western. The resulting tangle of railway lines and gargantuan train sheds has made the area completely inaccessible to the general public. A lone business centre, complete with Jamaican restaurant, on the area's western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

- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown

**fig. 42 Number of Workplaces by Survey Area**

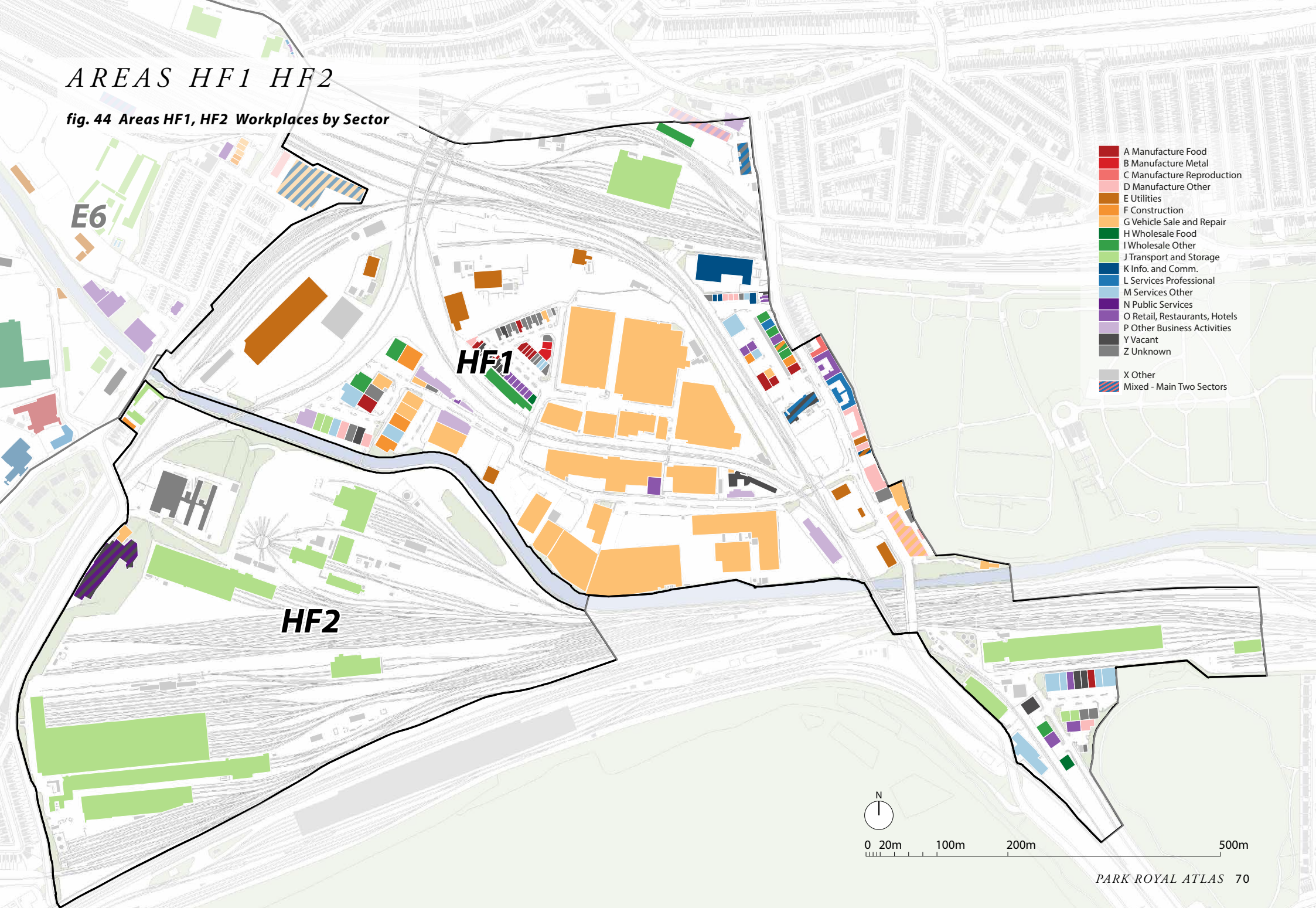


**fig. 43 Gross Floor Area by Survey Area**

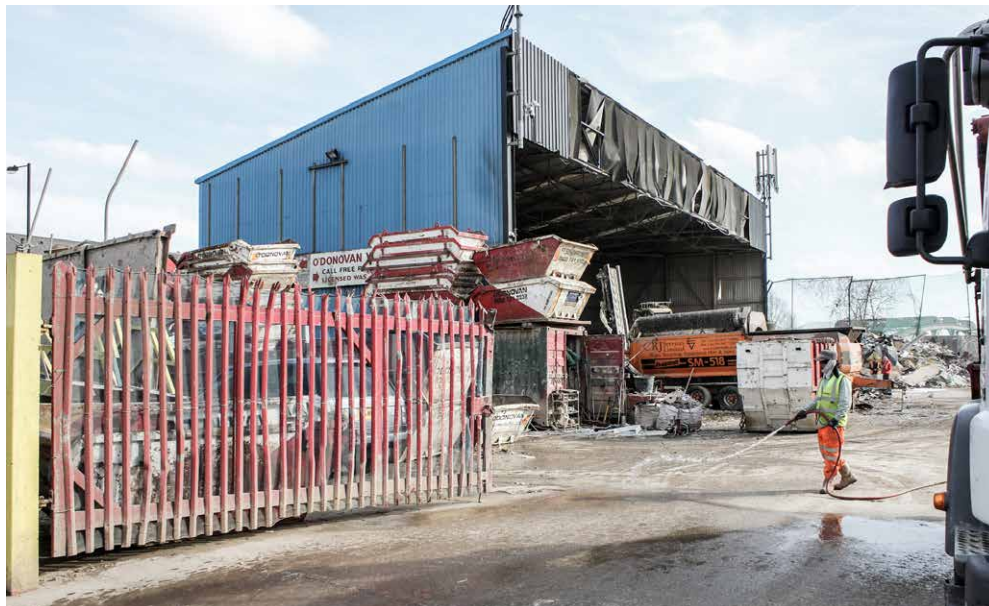


# AREAS HF1 HF2

fig. 44 Areas HF1, HF2 Workplaces by Sector



# AREAS HF1 HF2



## 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**





# POWER

## 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 CO<sub>2</sub> 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<sup>2</sup> 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 apologises 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).

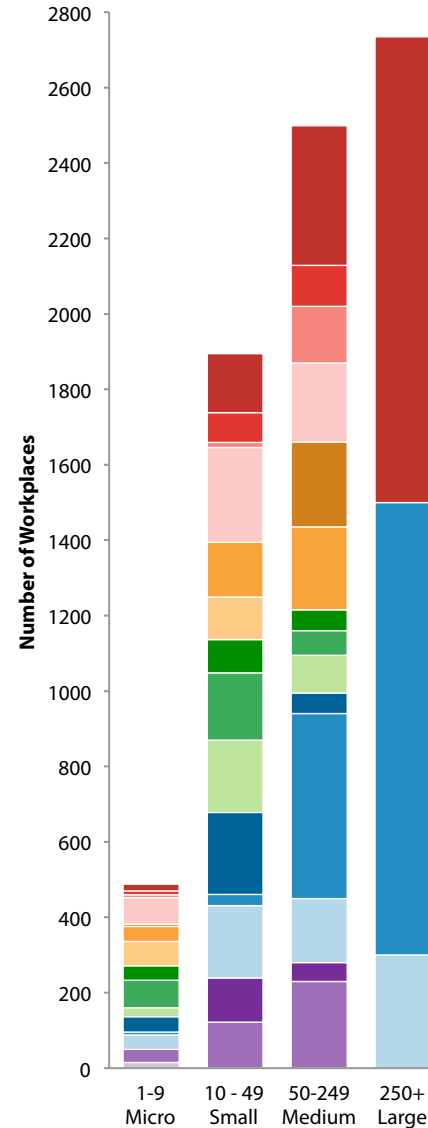
Workplaces with 250+ full time employees emerged as the largest employers of the workplaces interviewed, with 36% of the total. A few of these large workplaces are in the food manufacturing sector, making it the sector with the largest number of employees at 23%. Although large in number, micro workplaces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



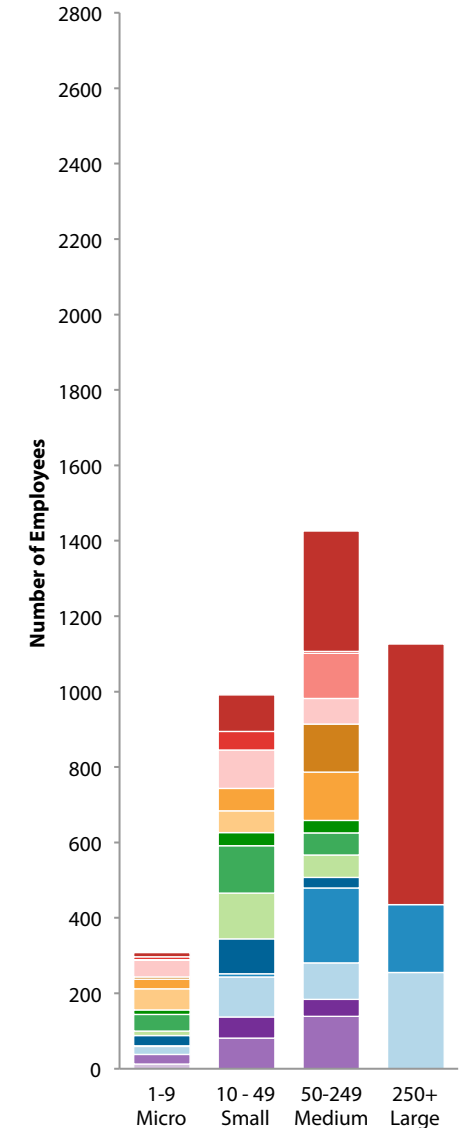
**fig. 45 Total Number of Employees by Workplace Size**

Interviewed workplaces only (14%)



**fig. 46 Number of Local Employees by Workplace Size**

Interviewed workplaces only (14%)



## TYPES OF BUSINESSES

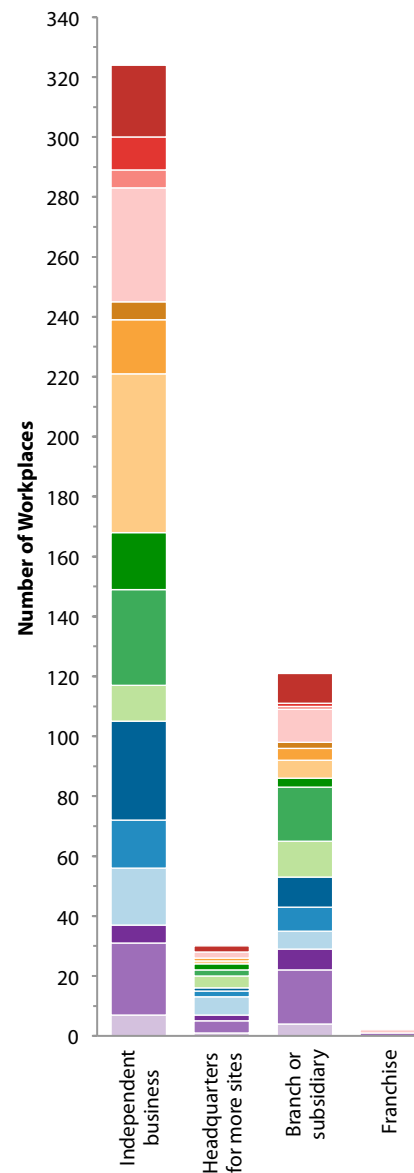
Park Royal is a hub for independent businesses, with 68% of workplaces interviewed listed as independent businesses. While there is a higher proportion of some business sectors, such as manufacturing other or vehicle sale and repair, all sectors are represented. This suggests that Park Royal offers favourable 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 business sectors with a concentration of retail, restaurants and hotels (15%) and other wholesale (15%). Only 4 of the businesses interviewed were franchises.



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



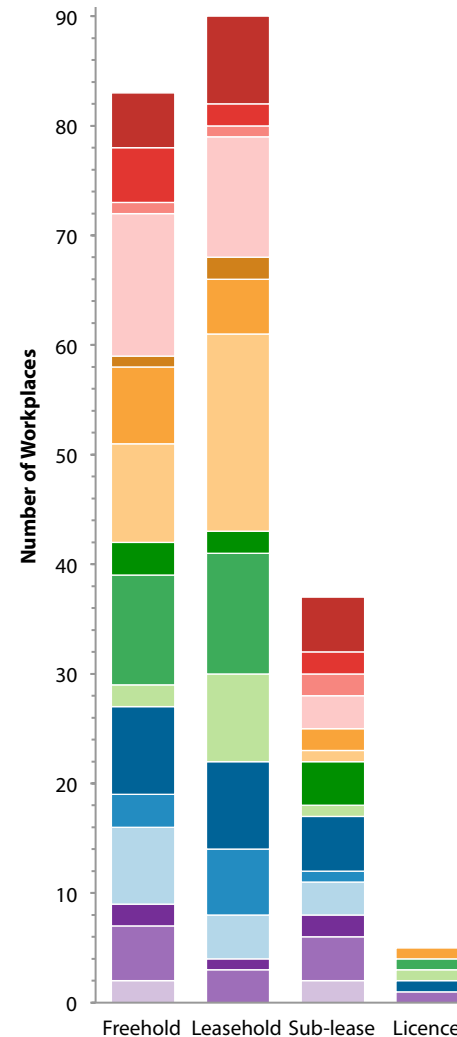
## TENURE

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.

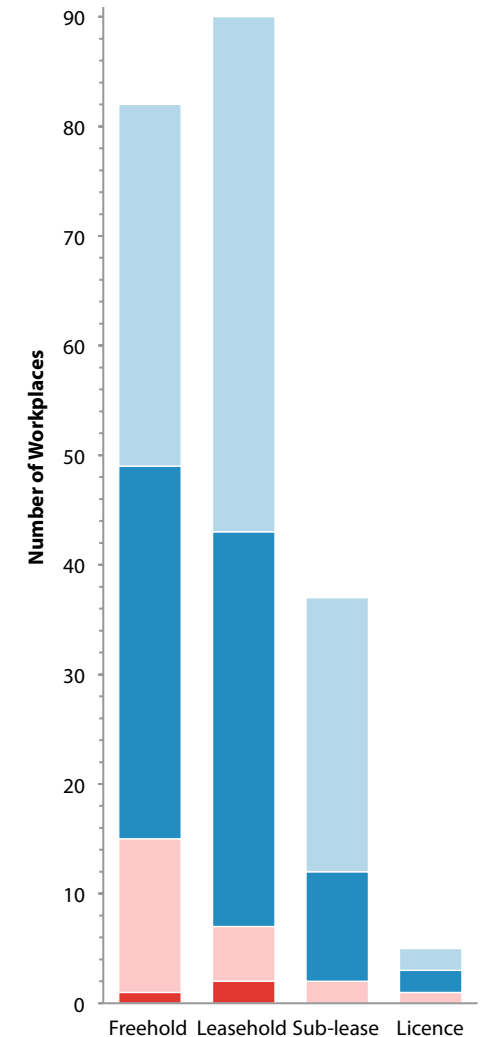
As regards the distribution of tenures depending on business sector (fig. 48), there is a tendency for the manufacturing, vehicle repair, wholesale, construction, as well as transport and storage businesses to own their premises, while a slightly higher rate of information and communication, service 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

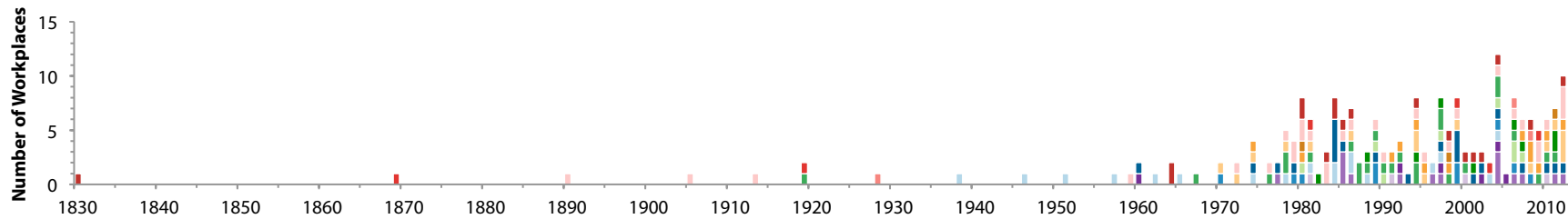
Some of Park Royal's oldest workplaces were interviewed, including well-known companies like McVities, established in 1830 moving to their Park Royal factory in 1902. The oldest surviving workplaces interviewed are almost exclusively in the manufacturing sector. Beginning in the 1930s, but becoming a 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

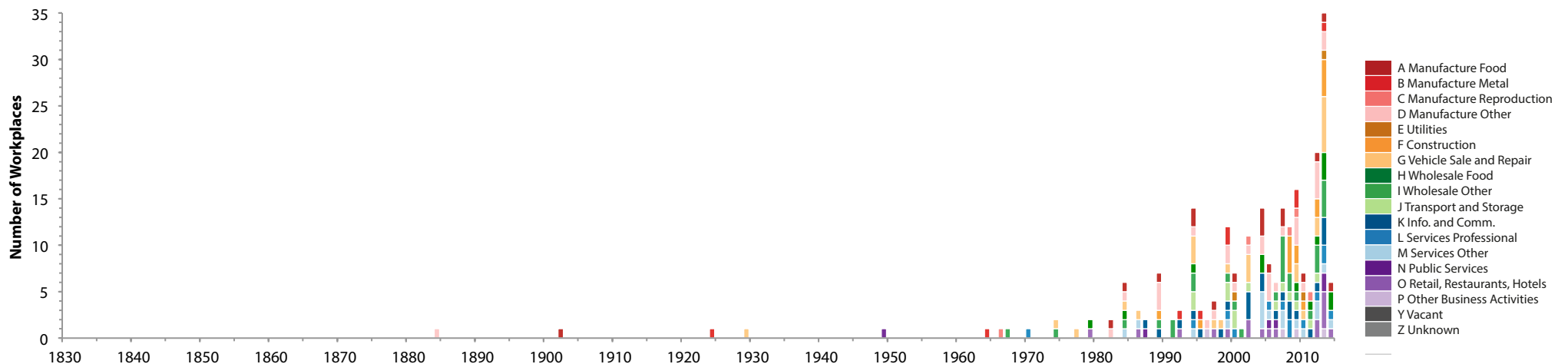
vehicle sale and repair workplaces have been founded. Many of the interviewed workplaces were founded elsewhere before choosing to move to their current Park Royal premises. This is clearly demonstrated by the fact that while 35 workplaces moved to their premises in 2011, only 10 were established in 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

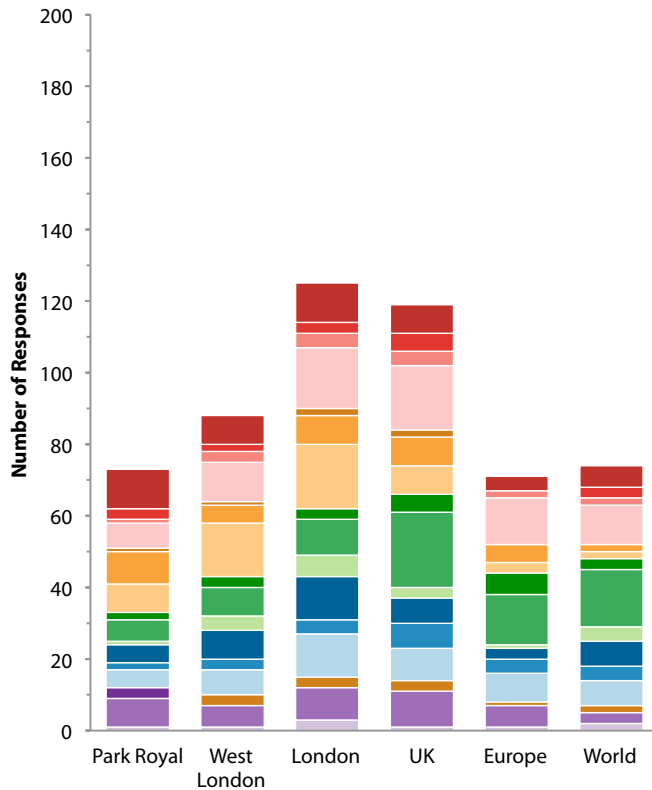
Interviewees were asked to select the locations of their primary suppliers and customers. On a first level the graphs of the accumulated responses show the important synergies within Park Royal of workplaces supplying each other. They also demonstrate that not only

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

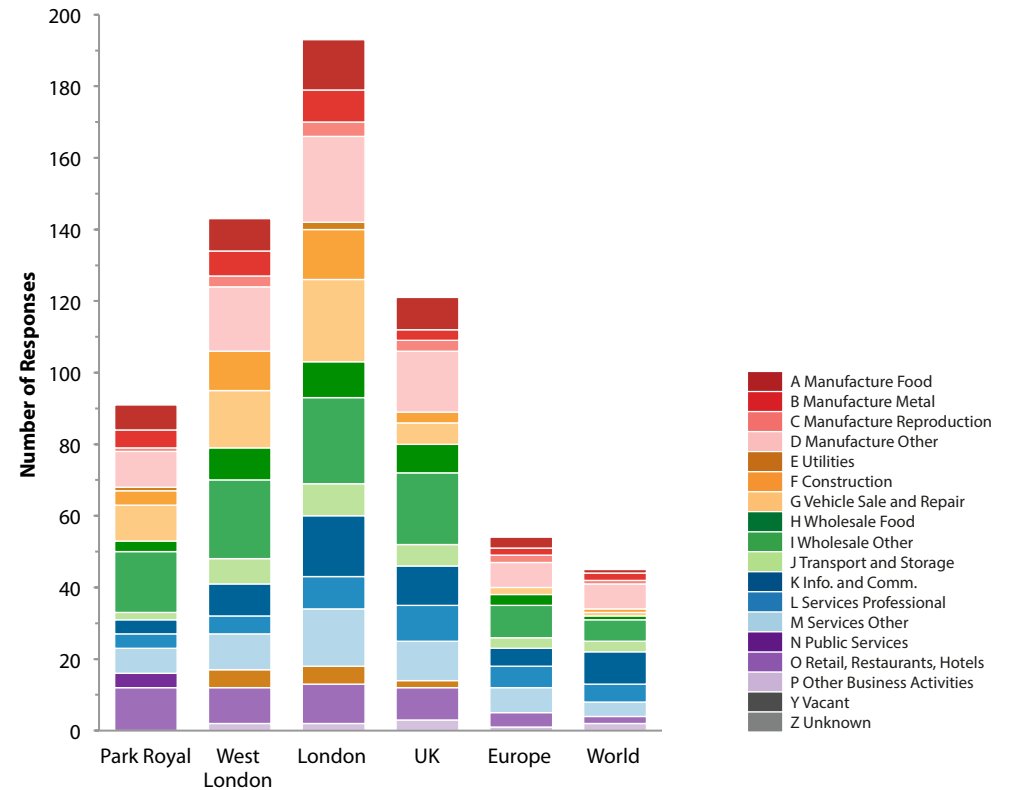
London-wide customer base. They also highlight Park Royal's importance as a base for London wholesalers, who import huge varieties of products from the UK and overseas for local, London and UK-wide customers. The service sector has a more dispersed customer and supplier base with

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%)



- A Manufacture Food
- B Manufacture Metal
- C Manufacture Reproduction
- D Manufacture Other
- E Utilities
- F Construction
- G Vehicle Sale and Repair
- H Wholesale Food
- I Wholesale Other
- J Transport and Storage
- K Info. and Comm.
- L Services Professional
- M Services Other
- N Public Services
- O Retail, Restaurants, Hotels
- P Other Business Activities
- Y Vacant
- Z Unknown



## BUSINESS GROWTH

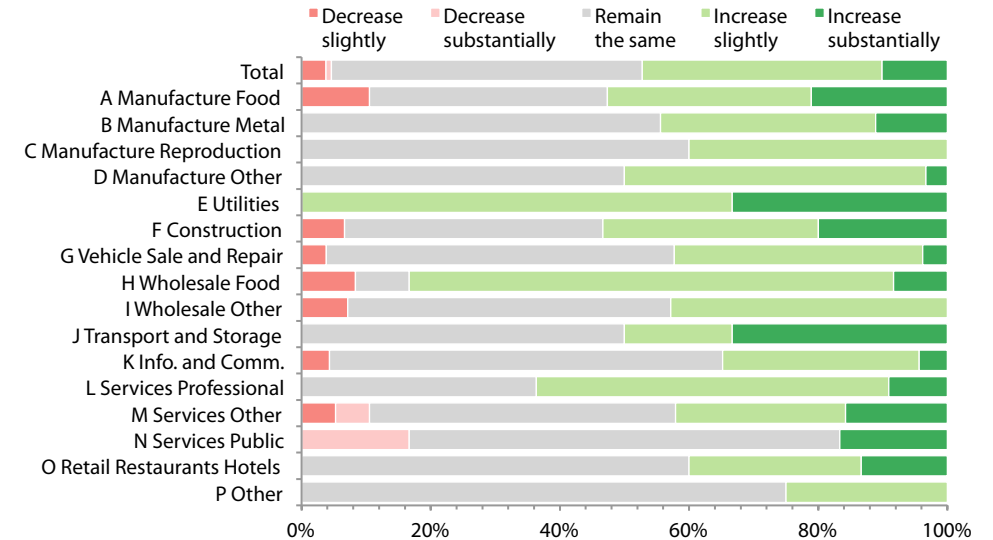
The overall response from interviewees was overwhelmingly positive when asked if they anticipated growth in employment or floor space at their workplace over the next year. 47% of workplaces anticipate an increase in employee numbers, and 27% anticipate that their workplace will need more space. The 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 communication 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***

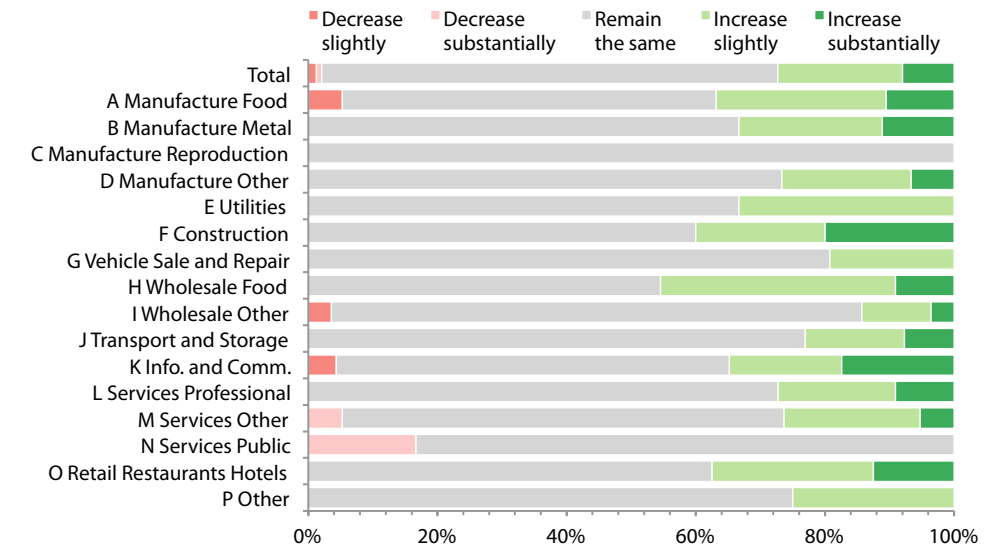
**fig. 54 Anticipated Employment Growth over Next Year**

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*



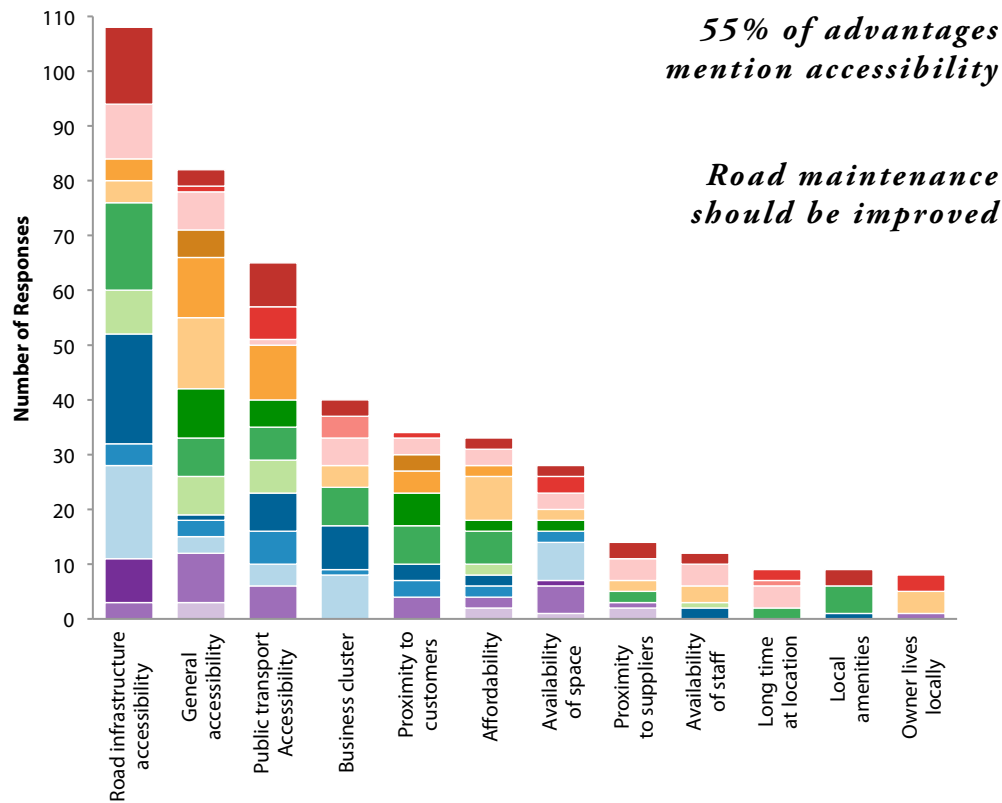
## ADVANTAGES

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.

**fig. 57 Advantages of Location Mentioned by Businesses**

Interviewed businesses only (14%)



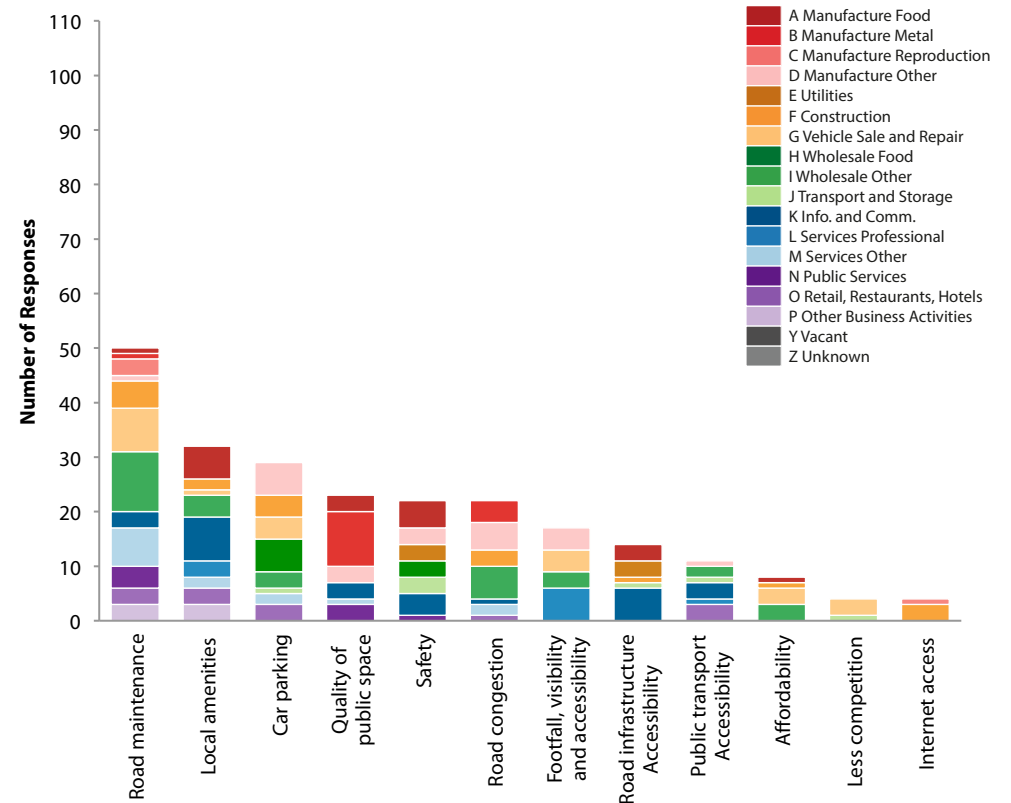
## IMPROVEMENTS

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

focused 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. 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.



