

Bringing the Wholesale Markets Together



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Foreword



The City of London's three wholesale food markets at Billingsgate, New Spitalfields and Smithfield have been feeding London for hundreds of years, and we are committed to their future.

Our number one priority is to maintain a top-quality market environment serving London – not just for today's Londoners and tenants, but also for tomorrow's.

Food supply, sustainability and environmental issues have never been so important, and our wholesale markets provide the framework to create new ways of feeding London with more sustainable, fresh produce. For this reason, I am passionate about investing in the future of our markets, as each market is facing a series of pressing challenges.

The market buildings are deteriorating and risk falling below the standards required of a modern wholesale market. Space is limited; maintaining food and health & safety standards is proving increasingly difficult and expensive; operating costs will only increase; and there is little opportunity to expand.

We have a duty to act, to reduce the unsustainable levels of traffic in central London and improve the Capital's air quality. Relocating our markets and making the most of sustainable logistics means we will be able to have a positive impact on these pressing concerns for London.

The move to Dagenham Dock will secure the future of the wholesale markets, providing more modern facilities and space for our tenants to grow so that they can continue to support London's food economy for the next generation.

The markets co-location will also help meet the City of London Corporation's wider policy objectives, ensuring that we improve air quality in the Capital; support a thriving economy; freeing up land for new homes and offices and achieving our Culture Mile ambitions.

I do hope that you will find this information helpful in explaining our vision for co-locating the wholesale markets and we look forward to your ongoing support.

Catherine McGuinness,
Chair of the Policy and Resources Committee

The Opportunities and Challenges



Smithfield Market.

We want our wholesale markets to flourish but the current facilities and trading environments at the three markets are outdated and unsustainable.

The condition and quality of the buildings are below what is expected of a modern wholesale market and even with significant investment, the markets would still be operating in old buildings in unsustainable locations.

This along with the many constraints of the buildings and the locations means the ability for businesses to maintain high standards is an ongoing concern.

Meanwhile, the current layout and space restrictions create substantial operating challenges and act as barriers to the expansion, and ultimately, the success of the businesses that buy and sell there.

While there are limited spaces for existing businesses to grow, there are also few available spaces for potential new businesses to trade.

Co-locating the markets will lead to significant operational efficiencies and improvements to sustainability. The new markets will be created to offer a better, safer environment for visitors.

The policy drive from the Mayor of London and the City of London Corporation is to improve London's air quality by reducing the number of vehicles, especially HGV's coming into the capital.

While this move would positively impact our air quality, it would also make the current locations of the markets even more unsustainable. The introduction of the Low Emissions Zone (LEZ) and the Ultra-Low Emissions Zone (ULEZ) is already increasing costs for businesses and customers and by 2021, the ULEZ will have expanded to encompass all three sites.

We believe the existing sites can be unlocked for better uses and the City of London Corporation has a responsibility to ensure we make the best use of the land.

The New Spitalfields and Billingsgate sites could become mixed-use developments which could provide new homes and office spaces.

Freeing up the Smithfield site will help us to realise our Culture Mile ambitions.

Billingsgate



- The UK's largest inland fish market faces some of the biggest challenges given the stringent safety standards for handling fish.
- A new facility would provide a temperature-controlled environment.
- Currently, tenants rely on ice to keep their produce chilled on display in order to meet their customers' expectations for fresh fish and to reduce the volume of food waste.

Smithfield



- The Grade II* listed buildings means there are limitations on the modifications that can be made to improve trading conditions and enhance the efficiency of the market.
- One of the biggest challenges for Smithfield Market comes from being an open environment and the ongoing risk of mixing HGV's forklift trucks, market workers, pedestrians, cars and cyclists.
- The risk between market operations and the public is expected to become even more challenging with the opening of the Elizabeth line and the Museum of London's relocation to West Smithfield.

New Spitalfields



- The UK's largest wholesale fruit and vegetable market was built in the early 1990s, but some parts of the building are already outdated and there is not enough room for tenants to store and display their produce.
- The restrictive site design, which has no unloading bays or delivery docks, creates substantial operating challenges, including safety issues between pedestrians and forklift truck drivers, which drive through the main market floor.
- In the new market, sufficient space and better facilities for deliveries and collections can be integrated into the building, alleviating some of the current logistical challenges.
- In the current location, the market cannot expand as the adjacent land is Metropolitan Open Land.

The Search for a Site and why Dagenham Dock



Map showing the current markets and the sites assessed during the site search process. Distances are measured from central London (Charing Cross).

Map Key

- 1 Smithfield Market
- 2 New Spitalfields Market
- 3 Billingsgate Market
- 4 Silvertown, LB Newham
- 5 Fairlop, LB Redbridge
- 6 Thames Enterprise Park, Thurrock
- 7 Dagenham Dock, LB Barking and Dagenham

In 2018, with the help of professional property advisors, we started our search for a suitable location for our markets.

Working with our tenants, an area broadly to the east and north east of London emerged as the starting point of our search.

Finding such a large piece of available land was a challenge and compromises needed to be made to find a suitable site.

A variety of sites were ultimately identified for further assessment, but most were a compromise between location and size.

4. Silvertown, London Borough of Newham

Although the site was the closest to the existing markets, the relatively small acreage (around 19 acres) meant the market hall would be spread vertically over a number of levels, which is something that the tenants did not want.

5. Fairlop, London Borough of Redbridge

The site in Fairlop offered a good balance between the size and proximity to London. However, the land was designated as green belt, and had little potential to embrace more sustainable transport solutions.

6. Thames Enterprise Park, Thurrock

The site in the Thames Enterprise Park was large, at well over 100 acres, and was accessible by rail or river at the nearby Thames Gateway Port. However, its distance from central London was a concern for tenants.

7. Dagenham Dock, London Borough of Barking and Dagenham

This site was the former Barking Reach Power Station and was acquired by the City of London Corporation in December 2018. With 42 acres of industrial land, connections to the rail network and the River Thames, the site had a number of advantages.

An assessment was also made about expanding New Spitalfields Market in Leyton to accommodate the other two wholesale markets. The only potential land was adjacent to the market, but this is designated as Metropolitan Open Land. Obtaining planning permission on what is essentially green belt would have been contrary to the values of the City of London Corporation, and consultation with stakeholders showed this option would not have been viable.

In the spring of 2019, a full assessment was carried out of the potential options, with the Dagenham Dock site considered the preferred option for realising our vision.

Why Dagenham Dock?

Not only will the move to Dagenham Dock secure the future of the wholesale markets, it will also revive an abandoned industrial site.

After a wide-ranging search and thorough assessment against other sites, Dagenham Dock – the site of a former power station – was identified as the clear preference and most suitable site to co-locate the markets.

The location, which is in London, benefits from a direct link to the A13 road network as well as rail and bus links. Access to the River Thames also presents a significant opportunity to use the river for the movement of produce.

Early design work by architects, Chetwoods, has demonstrated how the three markets can be co-located on the 42-acre site.

Co-locating the three wholesale markets onto this new site will lead to significant operational, safety and sustainability improvements for businesses, allowing them to focus on providing the best offer for their customers and deliver wider benefits across the whole supply chain.

The move will also provide an economic boost to Barking and Dagenham. The plan for the co-located markets has already received support from the leadership of the local authority.



The former Barking Reach Power Station site at Dagenham Dock.

The Proposals



This is a concept design developed in consultation with tenants and reflects how the co-located market could look.

This scheme co-locates all three markets to a new location creating a 21st century, wholesale food location for London and the UK, providing market tenants with modern facilities in a location that offers room for growth.

The development will be built with sustainable materials, using the latest environmental technology.

The buildings will be designed to target a high BREEM level and the plans will limit the upfront energy required during construction and when operational.

Our aim is to create a scheme that places the health and wellbeing of occupants and workers at its heart.

The design of each market supports wholesale, retail and process driven activities whilst allowing for future flexibility to meet demand as required.

A multi-deck yard will provide parking spaces for vans and cars at the front and rear which allows for the separation of vehicles with HGV deliveries taking place to the rear at ground floor level.

A green corridor to the west of the site links the scheme to the existing public transport network and the River Thames.

From this route, visitors will be able to access three individual market entrances. Each entrance will be unique and identify with the history and tradition associated with these markets.

These entrances lead to an atrium which provides daylight to the market below and connects to an entrance on the east of the site.

All three atria also serve as renewable energy generators, harnessing solar power through photovoltaic panels.

Our schematic layouts have also been carefully designed to adapt to the ever-changing demands of the retail market, with the potential introduction of a mezzanine level providing space for a future retail offering.

These are early layouts which will form the basis of an outline planning application to the London Borough of Barking and Dagenham.

Transport



Map showing the existing and proposed transport links to and from the Dagenham Dock site.

Co-locating three markets at Dagenham Dock requires a transport mix to ensure the markets are accessible, efficient and promotes a more sustainable environment.

Road

We know that the reliability of the road network, in particular the A13, is a concern and we recognise that a congested and unreliable strategic road network will be a challenge for the new markets opening at Dagenham Dock.

Our transport consultants and Be First are supporting Transport for London with a Strategic Plan for the road. The plan will seek to prioritise shorter-term improvements to the A13, to enable the co-located markets to open around 2025/2026 – subject to planning permission being achieved – and will also consider the longer-term improvements required.

Rail

If the markets are to be less reliant on the road network, we need to explore alternatives to road transport.

One option we are looking at is using the rail network to deliver produce to and from the market. The Dagenham Dock site benefits from a rail head (where goods are loaded and unloaded), which branches off the main line and runs along the eastern side of the site.

We are working with stakeholders to secure a deeper understanding of how we could use the rail network and what challenges we would need to overcome to make it successful.

Rail Operations Group (UK) is planning to carry out a limited trial, delivering small amounts of freight by rail into central London. This work is of great interest to us and could represent a model for transporting fresh produce, providing important learning opportunities for similar projects.

River

The Thames is one of London's greatest assets, and in line with our commitment to promote a more sustainable environment, we are looking at the use of the river for transporting produce, reducing the number of market vehicles on the road.

To turn river freight into a reality we are developing a strategy to pioneer using the river to transport food in the UK.

Our first milestone will be to purchase a jetty, close to the Dagenham Dock site. We will also need facilities in central London for dropping off produce. We are working close with the Greater London Authority, Port of London Authority and nearby landowners about a river consolidation centre in Dagenham and also the potential to develop other wharves in central London for use by the markets and other logistics providers.

Case Study

Franprix: Supplying Parisian Supermarkets using the River Seine



Photo of Franprix using the River Seine to transport food to their supermarkets in Paris.

In 2012, Franprix, a French food retail company supported by XPO Logistics started using the river as a transport mode to deliver produce to 100 of their supermarkets in the heart of Paris.

The shipment is transported in a container, from the warehouse to a river port in the outskirts of the city by vehicle. From there it is shipped by barge on the River Seine for 15 km to the Quai de la Bourdonnais, located near the Eiffel Tower.

Since the launch in 2012, XPO has continued to increase the number of containers transported by the river. Today, 250 Franprix stores in the French capital are supplied by mobile barges arriving at the Bourdonnais Quay.

The 'last mile' delivery to each supermarket has also been improved since the 2012 launch. Delivery is carried out by vehicles complying with Euro VI emissions standards, and since the beginning of 2019, around half of the truck fleet run on compressed natural gas.

XPO estimated that in 2019 the river barge solution equated to:

- 9,000 fewer truck trips annually.
- 35% reduction in carbon emissions (compared with an all road solution).

XPO expects to add a second barge on the Seine to service more Franprix stores and meet a projected increase to 11,000 containers.

Skills and Education



Photo of the Billingsgate Seafood School.

The co-location of our wholesale food markets at Dagenham Dock provides a unique opportunity for the City of London Corporation to work with the London Borough of Barking and Dagenham on our shared commitment to education and business.

We will look to provide a new Food School that builds on the success of established practices like the Smithfield Apprenticeship Scheme and the Billingsgate Seafood Training School and activity supports the local community.

Opportunities

A range of stakeholders across the London Borough of Barking and Dagenham and the South East would benefit from the inclusion of a food skills, education and training presence as it will:

- Train tomorrow's market traders, providing the skills required to develop our future butchers, fishmongers, and fruiterers.

- Link with industry and provide direct pathways into employment.
- Offer existing and new market tenants access to bespoke courses aimed at supporting and growing their businesses.
- Encourage new businesses and young entrepreneurs to establish themselves within the markets or within the local area, helping the main markets continue to thrive.
- Support the local community and work with local schools and colleges to teach cooking skills and increase the understanding of food science and the food chain.
- Provide an environment where ground-breaking ideas and innovation flourish, helping the markets stay relevant in a rapidly changing world.

What could this look like?

Our proposals include potential future space to support apprenticeships, short courses, classroom training, recreation courses, and food preparation space.

We continue to work closely with the local borough and Be First to see which elements could be best located within the new markets and which ones will thrive in Barking Town Centre.

The Future of Food Wholesaling

We know the future of retail is changing and this also applies to food retail and the hospitality sector.

The move to the co-located market site will help to support our existing and future wholesale tenants in a changing retail environment. As a responsible landlord, we want to be at the forefront of this change so we can ensure our markets thrive.

This is why we have been carrying out research with partners and experts in a number of areas that we believe are vital to create a successful and modern wholesale market at Dagenham Dock.

1. The Future of Food

We are exploring how we meet the needs of food wholesaling now and in the future.

One of our challenges is how we encourage small businesses, which make up the majority of our tenants, to think ahead now about longer-term challenges, such as electronic ordering and 5G connectivity, while keeping their businesses running day-to-day.

More and more people rightly want to know where their food is coming from, and creating the most sustainable market possible – not just in terms of produce, but also operations – is also high on our agenda. Feedback from this research suggested we could consider the potential of growing produce on the roof, creating a vertical farm, reducing the amount of waste and increasing the volume that is recycled in addition to establishing an energy exchange.



Photo example of a vertical farm.

2. Transport and Logistics

We know that finding new solutions for logistics and transport is an important step to achieving a more sustainable and competitive wholesale market.

Our second research topic is focused on broadening our understanding of logistics and how using the river and rail network could change the way produce is brought to and from the markets.

Industry experts from Eddie Stobart, Ocado, the Port of London Authority and Transport for London are supporting our work as we look at freight consolidation to reduce the volume of vehicles the markets create and explore alternatives such as rail and river.

Existing Sites



Map data ©2019 Google Earth.

There are significant benefits of releasing the existing market sites for other uses, including delivering on three of our corporate objectives: to contribute to a flourishing society; to support a thriving economy; and to shape outstanding environments.

The New Spitalfields and Billingsgate sites could become mixed-use developments which could provide new homes and office spaces; while Smithfield could be reimagined to house uses that complement the City of London Corporation's emerging Culture Mile.

There are also opportunities to contribute positively to sustainability and reduced traffic.

Legislation will be required to complete the formalities for relocating the wholesale markets.

Smithfield

Culture Mile is a major destination for culture and creativity in the City of London and the Smithfield Market buildings will form an integral part of this.

The Museum of London has exciting plans to move into the former General Market, Annexe buildings and elements of the Poultry Market buildings at West Smithfield, which will signal the start of a new chapter for the wider Market buildings.

We recognise the importance of these Market buildings, which have housed Smithfield Market for over 150 years. Our aim is to protect their historic fabric and enhance the overall structures.

Architects, Studio Egret West, will help us to develop concepts for a vibrant, mixed-use development that fits at the core of Culture Mile. The plans will maintain the historic character of the existing buildings and ensure their legacy for the next 150 years, serving visitors and Londoners alike.

Billingsgate

Plans for this site will be brought forward by a developer and determined by the London Borough of Tower Hamlets, in line with Greater London Authority planning policy. The draft Local Plan, says the Billingsgate site could become:

- A mixed-use development to provide new homes and office spaces.
- Support uses such as gyms, open space, hotels, restaurants and retail.
- Opportunity to activate the docks that front onto the water.



Map data ©2019 Google Earth.

New Spitalfields

Plans for this site will be brought forward by a developer and determined by the London Borough of Waltham Forest. Possibilities for the future of the site include:

- A mixed-use development with a focus on delivering new homes, which reflects the site's position within the borough's key corridor for economic growth and intensification.
- An opportunity to accommodate creative industries to retain employment and respond to the borough's status as the first London Borough of Culture.
- A new railway station – Ruckholt Road on the edge of the site.



Map data ©2019 Google Earth.

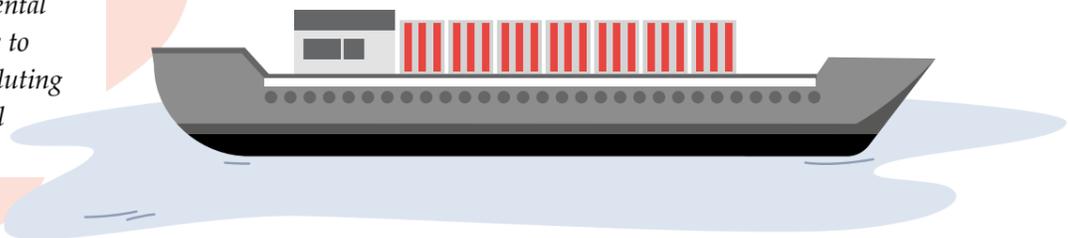
Summary of Benefits

Bringing the wholesale markets together will secure the future of London's wholesale markets by creating a modern, sustainable food centre for London and the South East. Benefits of the move will be felt across the whole food supply chain, as well as for the boroughs and for Londoners.



Making use of the river to transport food, reducing the pressure on the nearby road network.

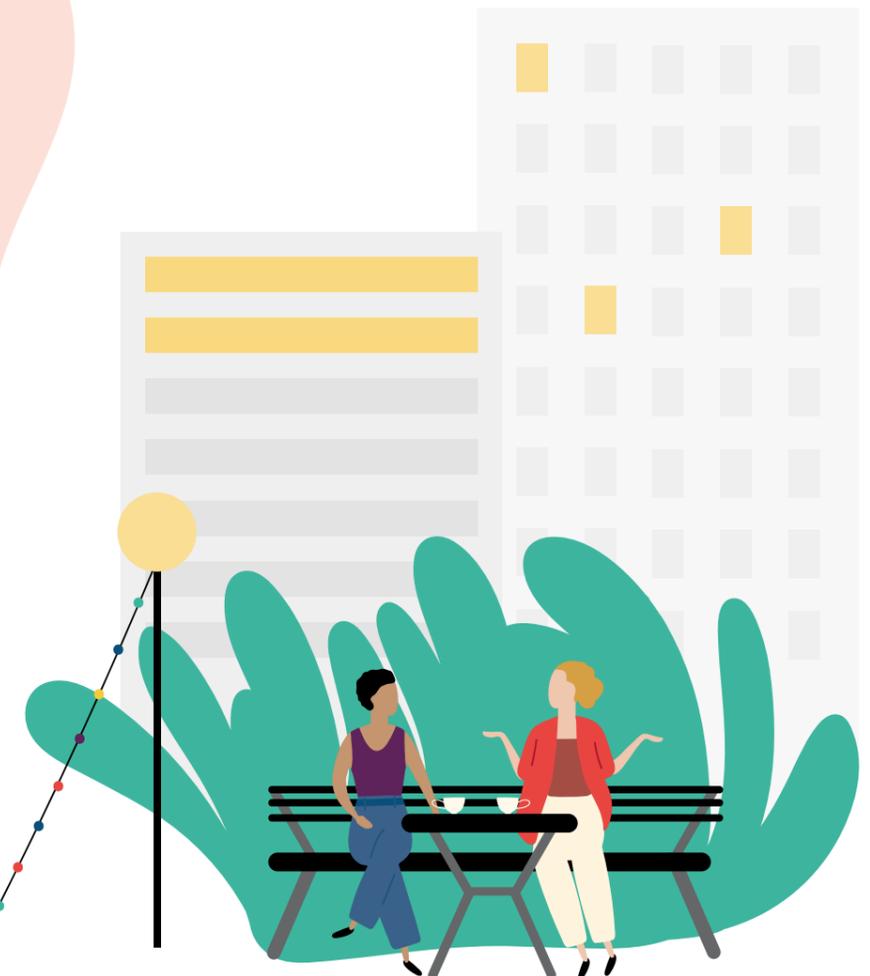
Align with existing and emerging environmental and transport policy to remove the most polluting vehicles from central London.



Regenerate a disused brownfield industrial site and act as a catalyst for further growth in the area.

Release land to enable mixed-use developments which could provide new homes, offices, retail and cultural spaces.

Pave the way to create a new cultural destination at West Smithfield, helping to maintain London's global competitiveness.

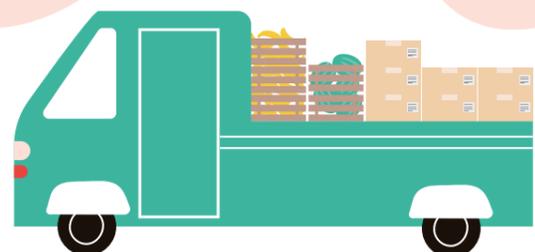


A modern and sustainable co-located food location, which will serve existing and future generations.

Provide significant operational, safety and sustainability improvements to allow new and existing businesses to flourish and grow.

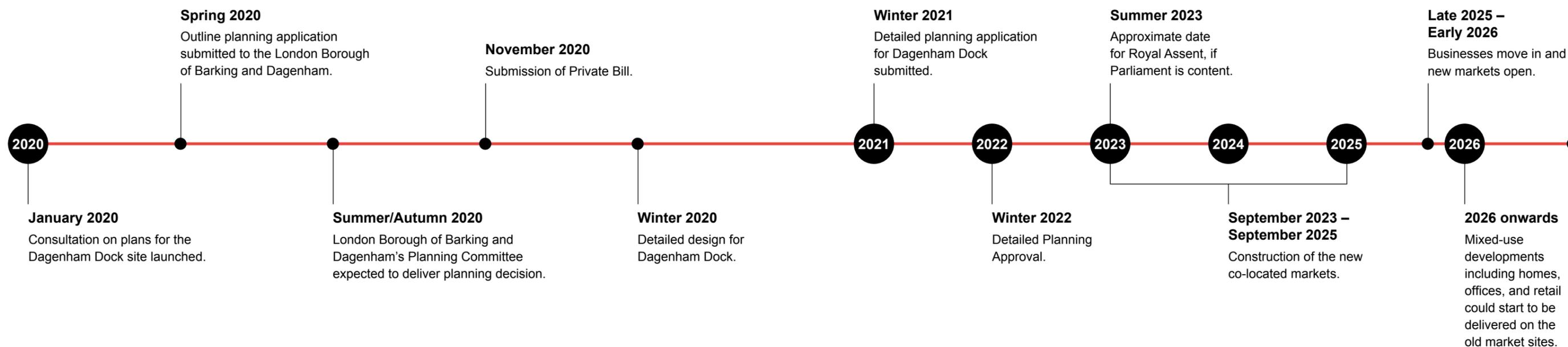
Create a single location for customers to purchase goods.

Work with the London Borough of Barking and Dagenham to provide a new training school, which will train future market traders and food workers across all levels.



Next Steps

Indicative timeline and subject to change



Ongoing engagement

We held a public consultation in the summer of 2019 on our plans for co-locating the markets to the Dagenham Dock site with local residents, businesses and market tenants.

Most recently, we have consulted with local residents and businesses around the potential new location for the markets at Dagenham Dock, with a view to submitting an outline planning application to the London Borough of Barking and Dagenham.

If you have any comments or would like to talk with the markets team, you can contact us at marketsprogramme@cityoflondon.gov.uk.

We are committed to continuing our engagement with our tenants, local authorities, communities and other key stakeholders throughout the programme to co-locate the markets.



The City of London Corporation is the governing body of the Square Mile dedicated to a vibrant and thriving City, supporting a diverse and sustainable London within a globally-successful UK