# 2015 Annual Summary

## Subdivision, Land Development and Zoning Activity


Montgomery County Planning Commission

Montgomery County, Pennsylvania

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greenprint
Montgomery County, PA

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This report summarizes the subdivision, land development, and zoning proposals received by the Montgomery County Planning Commission in 2015. The proposals were reviewed under the requirements of the Pennsylvania Municipalities Planning Code (Act 247).

The information and statistics in this report reflect proposal plans only - not actual construction activity. Information on construction activity is available from municipal building inspectors and zoning officers as well as the Montgomery County Board of Assessment Appeals. Subdivision activity is recorded on tax maps, which are available for viewing in the Montgomery County Board of Assessment Appeals map room. Property records from the county are also available online at propertyrecords.montcopa.org. The Planning Commission also publishes two annual reports covering residential and nonresidential construction activity for the previous year. These reports are usually published in early summer.

Proposed plans are preliminary plans under consideration for municipal approval. Proposed plan characteristics discussed in this report include residential acreage and number of units by type, and nonresidential acreage and square footage.

The report contains a brief summary of zoning text and map amendments. Special requests for review (such as conditional uses) are not included.

This report can be used to indicate areas of the county that may experience development in the future. Ten-year summaries are included to provide a historical perspective.

*Note to the 2015 Annual Summary:*

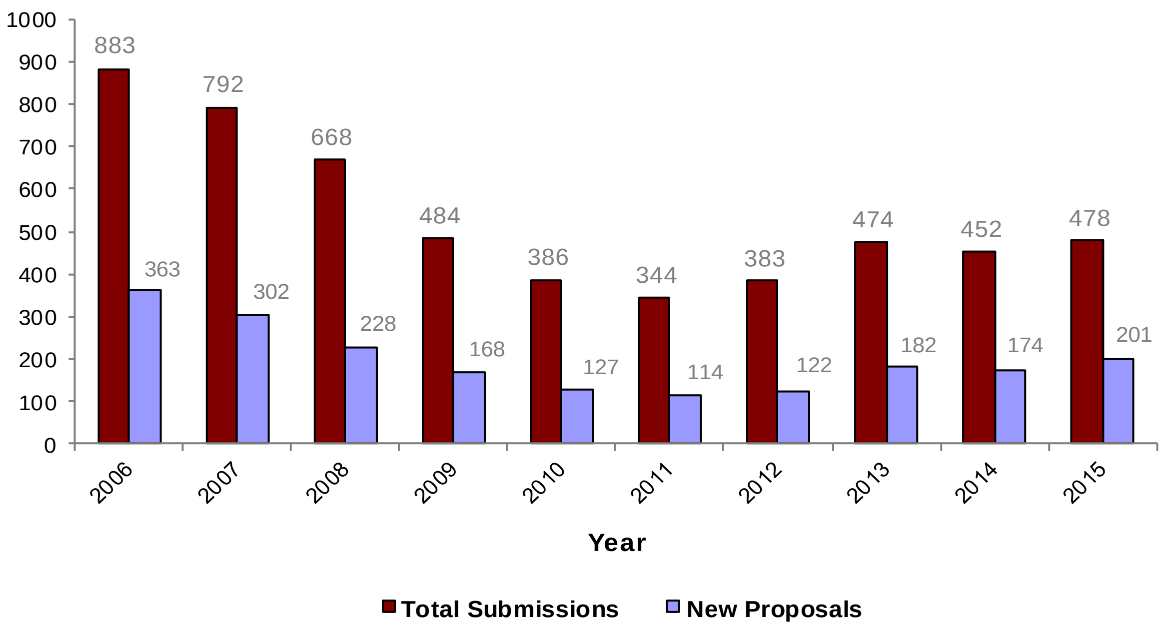
Development proposals submitted at the site of the Village at Valley Forge in Upper Merion Township have been included in this analysis despite not having been formally submitted to MCPC. This site was granted a court-ordered approval in 2006 and is not required to undergo the Act 247 process, although developments are still required to receive final plan approval from the township. This report recognizes submissions from the Village in the year that they occurred. In 2015, there were 979 multifamily units proposed from three applicants within the Village site.

# Section One
## Number of Submissions

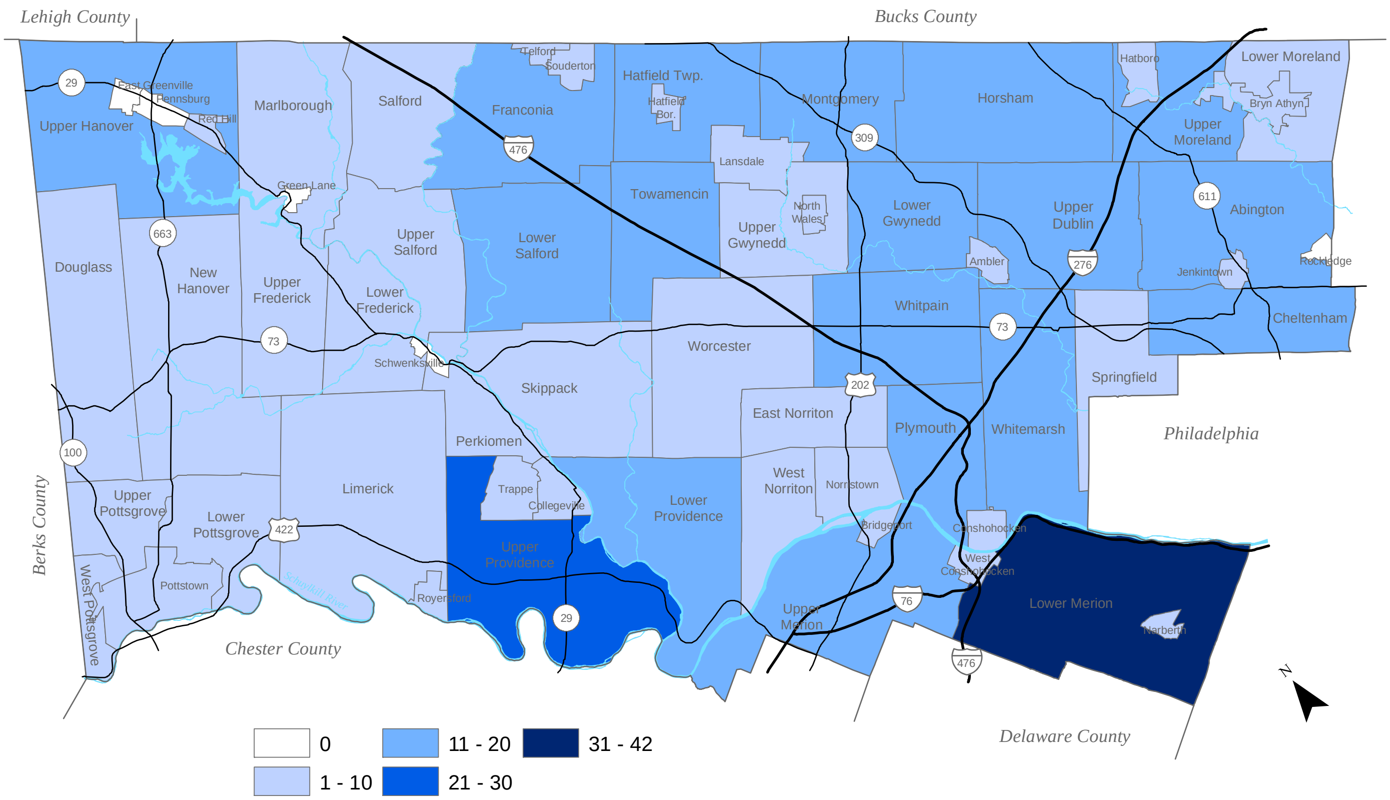
In 2015 the Planning Commission received 478 applications for subdivision, land development, and zoning ordinance and map amendments. This was 6% more than in 2014. The increase also represents the highest number of submissions in the last six years.

The 2015 submissions included 201 new proposals for land developments or subdivisions that had not been previously submitted with similar land use and density components.

**Total Annual Submissions, 2006 to 2015**



## Number of Submissions by Municipality, 2015




A look at the county map above reveals that submission activity in 2015 was relatively spread throughout the county, but a bit more frequent in the Eastern, more developed side of the county. Lower Merion, Upper Providence, and Upper Dublin had the most submissions.

## Montgomery County Submissions by Municipality, 2015

| Municipality | Total | Land Developments | Subdivisions |
|---|---|---|---|
| Abington | *19* | 9 | 6 |
| Ambler | *10* | 1 | 1 |
| Bridgeport | *2* | 2 | 2 |
| Bryn Athyn | *1* | 1 | 0 |
| Cheltenham | *12* | 6 | 3 |
| Collegeville | *2* | 1 | 1 |
| Conshohocken | *6* | 5 | 3 |
| Douglass | *4* | 3 | 2 |
| East Greenville | *0* | 0 | 0 |
| East Norriton | *4* | 0 | 1 |
| Franconia | *17* | 10 | 9 |
| Green Lane | *0* | 0 | 0 |
| Hatboro | *5* | 3 | 3 |
| Hatfield Borough | *1* | 1 | 0 |
| Hatfield Township | *13* | 9 | 8 |
| Horsham | *16* | 8 | 7 |
| Jenkintown | *2* | 1 | 1 |
| Lansdale | *4* | 3 | 3 |
| Limerick | *8* | 6 | 4 |
| Lower Frederick | *1* | 0 | 0 |
| Lower Gwynedd | *13* | 3 | 2 |
| Lower Merion | *42* | 24 | 14 |
| Lower Moreland | *4* | 3 | 2 |
| Lower Pottsgrove | *8* | 4 | 3 |
| Lower Providence | *16* | 8 | 4 |
| Lower Salford | *17* | 5 | 5 |
| Marlborough | *1* | 0 | 1 |
| Montgomery | *12* | 5 | 2 |
| Narberth | *4* | 0 | 1 |
| New Hanover | *5* | 5 | 3 |
| Norristown | *2* | 1 | 0 |

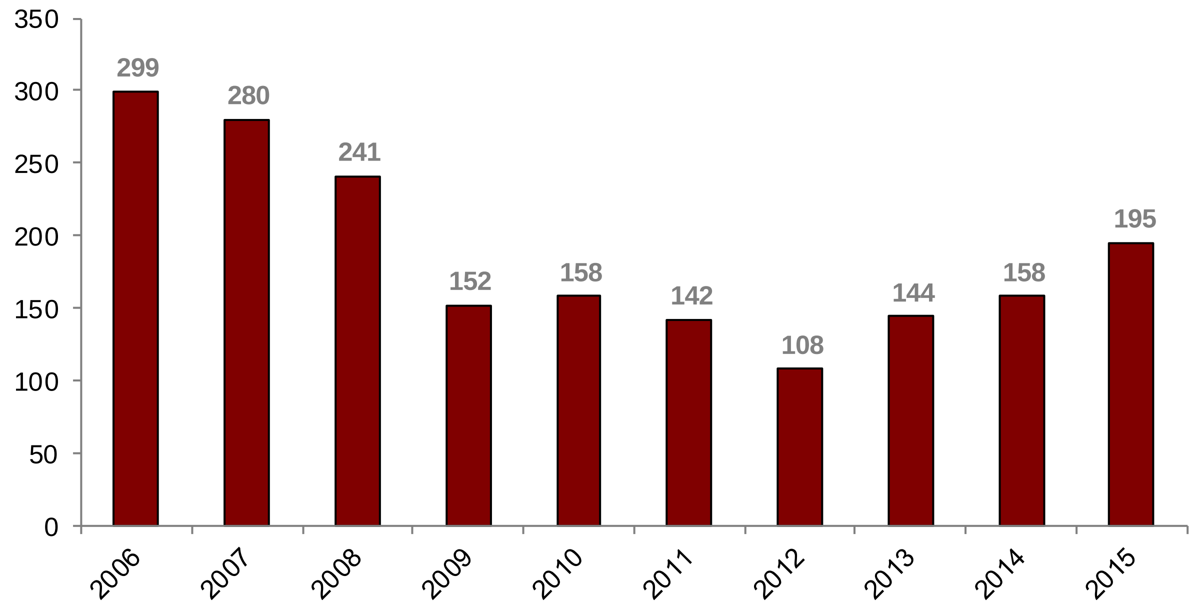
| Municipality | Total | Land Developments | Subdivisions |
|---|---|---|---|
| North Wales | *3* | 3 | 3 |
| Pennsburg | *0* | 0 | 0 |
| Perkiomen | *4* | 3 | 2 |
| Plymouth | *13* | 7 | 7 |
| Pottstown | *5* | 2 | 0 |
| Red Hill | *3* | 1 | 1 |
| Rockledge | *0* | 0 | 0 |
| Royersford | *1* | 1 | 0 |
| Salford | *3* | 1 | 1 |
| Schwenksville | *0* | 0 | 0 |
| Skippack | *2* | 1 | 1 |
| Souderton | *7* | 4 | 3 |
| Springfield | *9* | 3 | 1 |
| Telford | *2* | 0 | 0 |
| Towamencin | *13* | 2 | 1 |
| Trappe | *5* | 1 | 3 |
| Upper Dublin | *20* | 5 | 6 |
| Upper Frederick | *8* | 1 | 2 |
| Upper Gwynedd | *8* | 3 | 3 |
| Upper Hanover | *13* | 2 | 6 |
| Upper Merion | *12* | 7 | 1 |
| Upper Moreland | *18* | 11 | 1 |
| Upper Pottsgrove | *2* | 0 | 2 |
| Upper Providence | *22* | 15 | 7 |
| Upper Salford | *3* | 1 | 1 |
| West Conshohocken | *6* | 3 | 4 |
| West Norriton | *9* | 4 | 0 |
| West Pottsgrove | *1* | 1 | 0 |
| Whitemarsh | *14* | 7 | 5 |
| Whitpain | *15* | 6 | 5 |
| Worcester | *6* | 3 | 3 |
| **Totals** | ***478*** | **225** | **160** |

Note: Municipal totals also include zoning-related submissions and special reviews. Also, land developments and subdivisions may appear on the same submission, so the sum of these two actions may actually be greater than the total submissions.

### Approved Plans

In 2015, 195 plans were approved by their respective municipalities for the first time and recorded as a final plan. These plans were not necessarily submitted in 2015. In fact, many had originally been submitted in previous years. They may have undergone extended review periods and multiple revisions before eventually gaining approval. Applicants may have also incurred delays due to financing or other economy-related causes before getting a project approved.

**Total Plans Approved, 2006 to 2015**



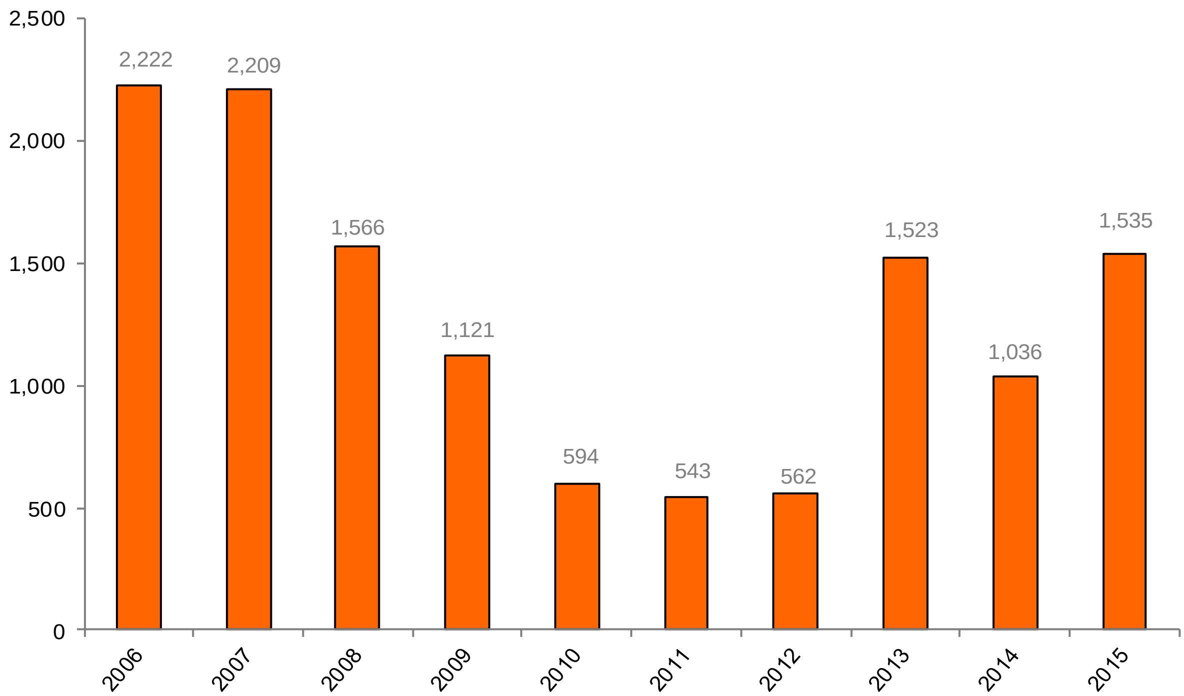
# Section Two

## Acreage of Submissions

### Countywide Acres Proposed for Development

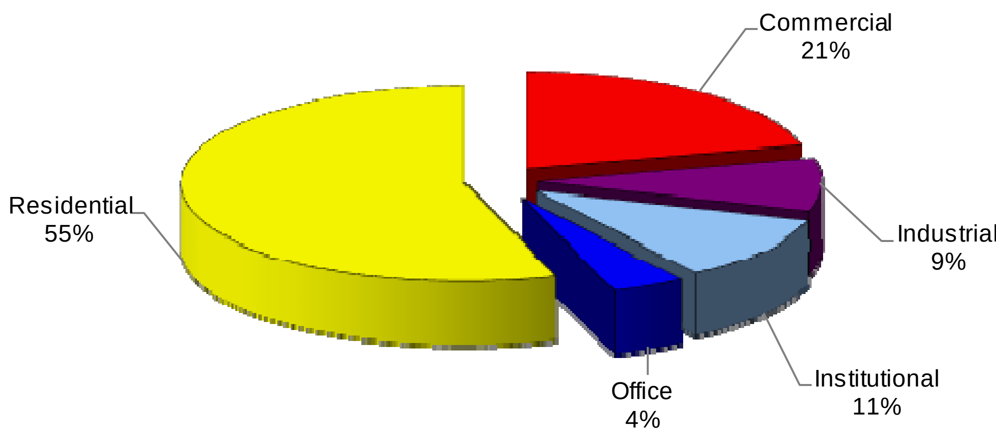
The total amount of land proposed for development in 2015, which excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates, transportation or utilities, was 1,535 acres. This represents a 48% increase in the amount of acreage proposed compared to the previous year, although it is still well below the pre-recession acreage proposed.

**Acreage Proposed for Development, 2006 to 2015**



The chart below shows the breakdown of acreage proposed for development by land use type. Land proposed for residential use is typically the largest land consumer, and that pattern held true to form in 2015 with 55% of acreage proposed going toward residential uses. All of these categories were more active than in recent years, so the land acreage percentages still reflect a traditional pattern of distribution.

**Acres Proposed for Development by Type, 2015**




The amount of land proposed in 2015 for residential use (849 acres) was the highest residential total in the last eight years. A rebound in residential activity is finally occurring after the housing bubble burst in the late 2000s, but it is still unlikely that we will see the kind of acreage consumed in previous decades. There is simply less undeveloped land available and the prominence of denser housing types over single family detached homes (see Section 3) will result in less land being consumed per home. Detached homes normally consume the most acres per unit of all housing types.

Total nonresidential acreage proposed amounted to 687 acres in 2015 and was outgained by residential acreage proposed for the fourth year in a row.

### Acres Proposed for Development by Municipality

The table on the opposite page shows the dispersal of proposed acres throughout the county. In 2015, Cheltenham and Hatfield Township led the county with 122 acres and 115 acres proposed for development, respectively. Other leading municipalities included Upper Providence, Upper Hanover, Worcester, and Lower Merion Townships.

## Montgomery County Acres Proposed For Development by Municipality, 2015

| Municipality | Total | Nonresidential | Residential |
|---|---|---|---|
| Abington | *28* | 4 | 24 |
| Ambler | *0* | 0 | 0 |
| Bridgeport | *0* | 0 | 0 |
| Bryn Athyn | *0* | 0 | 0 |
| Cheltenham | *122* | 40 | 81 |
| Collegeville | *1* | 0 | 1 |
| Conshohocken | *11* | 10 | 1 |
| Douglass | *20* | 0 | 20 |
| East Greenville | *0* | 0 | 0 |
| East Norriton | *13* | 13 | 0 |
| Franconia | *77* | 53 | 23 |
| Green Lane | *0* | 0 | 0 |
| Hatboro | *8* | 0 | 8 |
| Hatfield Borough | *0* | 0 | 0 |
| Hatfield Township | *115* | 97 | 17 |
| Horsham | *72* | 18 | 55 |
| Jenkintown | *1* | 1 | 0 |
| Lansdale | *1* | 0 | 1 |
| Limerick | *31* | 12 | 20 |
| Lower Frederick | *0* | 0 | 0 |
| Lower Gwynedd | *18* | 18 | 0 |
| Lower Merion | *82* | 57 | 25 |
| Lower Moreland | *1* | 0 | 1 |
| Lower Pottsgrove | *44* | 0 | 44 |
| Lower Providence | *44* | 27 | 17 |
| Lower Salford | *19* | 0 | 19 |
| Marlborough | *0* | 0 | 0 |
| Montgomery | *34* | 25 | 9 |
| Narberth | *0* | 0 | 0 |
| New Hanover | *25* | 4 | 22 |
| Norristown | *31* | 31 | 0 |

| Municipality | Total | Nonresidential | Residential |
|---|---|---|---|
| North Wales | *1* | 0 | 1 |
| Pennsburg | *0* | 0 | 0 |
| Perkiomen | *12* | 2 | 10 |
| Plymouth | *38* | 6 | 32 |
| Pottstown | *1* | 0 | 1 |
| Red Hill | *21* | 0 | 21 |
| Rockledge | *0* | 0 | 0 |
| Royersford | *0* | 0 | 0 |
| Salford | *3* | 0 | 3 |
| Schwenksville | *0* | 0 | 0 |
| Skippack | *2* | 0 | 2 |
| Souderton | *8* | 8 | 0 |
| Springfield | *0* | 0 | 0 |
| Telford | *0* | 0 | 0 |
| Towamencin | *6* | 6 | 0 |
| Trappe | *11* | 0 | 11 |
| Upper Dublin | *73* | 21 | 53 |
| Upper Frederick | *16* | 0 | 16 |
| Upper Gwynedd | *8* | 6 | 1 |
| Upper Hanover | *84* | 15 | 69 |
| Upper Merion | *50* | 20 | 30 |
| Upper Moreland | *30* | 21 | 10 |
| Upper Pottsgrove | *2* | 0 | 2 |
| Upper Providence | *97* | 90 | 7 |
| Upper Salford | *32* | 0 | 32 |
| West Conshohocken | *8* | 6 | 2 |
| West Norriton | *59* | 1 | 58 |
| West Pottsgrove | *0* | 0 | 0 |
| Whitemarsh | *35* | 23 | 12 |
| Whitpain | *54* | 44 | 10 |
| Worcester | *84* | 6 | 78 |
| **Totals** | ***1,535*** | **687** | **849** |

Note: Figures include age restricted development and exclude agricultural, residential country estates, municipal, open space, recreation, transportation and utility acreage. They have also been rounded to the nearest whole acre.

## Acreage Proposed for Development on Previously Developed Sites

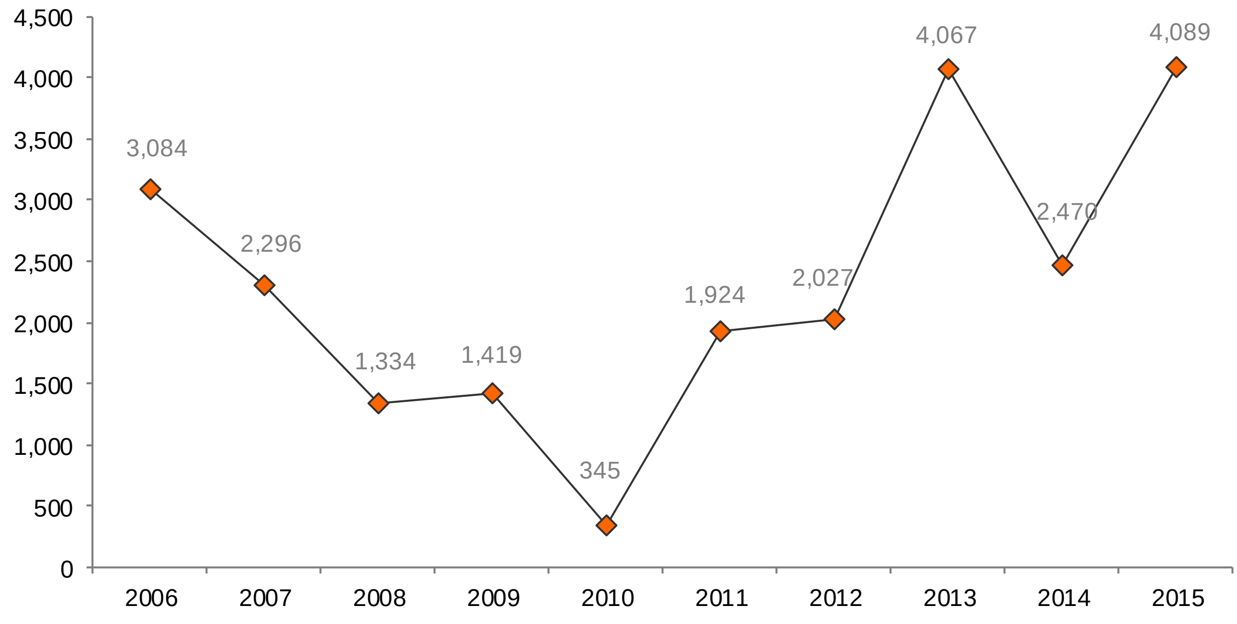
In 2000, the Planning Commission began tracking proposed subdivisions and land developments with regard to the amount of existing developed land already on the proposed site. A record is kept of the approximate percentage of a site proposed for development that already has a structure, parking lot, or some other man-made feature. In 2015, the Planning Commission estimates that approximately 39% of the acres proposed for development had some such feature on it. Overall, this is reflective of a trend toward residential, commercial, and industrial infill development, rather than toward developing tracts of previously undisturbed open space. This rate is consistent with the average over the last six years, which was about 40%.

# Section Three
## Residential Submissions

### Proposed Residential Development

There were 4,089 units proposed in 2015. This continues the recovery since the recession and the crash of the housing market bubble. Recent totals are now similar to the years just before the recession and back in the 1990s when annual proposals were generally around 3,000 to 4,000 units. The bigger difference between now and then is in the type of units being proposed. While the owner-occupied housing market is also improving, the demand for rental housing has really pushed the recent gains in multifamily housing over the last five years.

**Proposed Residential Units, 2006 - 2015**



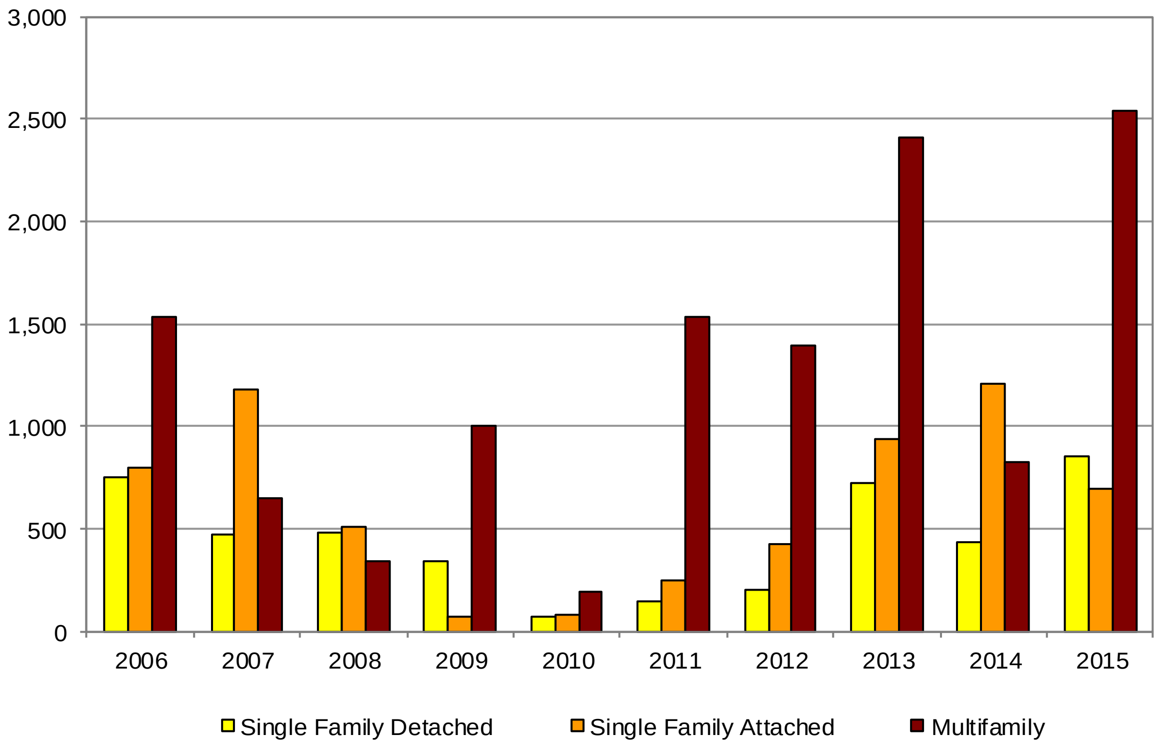

*Note:*

### Residential Proposals by Type

2015 marked a return to multifamily housing being the dominant proposed unit type. Since 2008, the densest housing type has frequently accounted for more than half of all the units proposed. The booming rental apartment market has certainly held an influence, but that is not the whole story. Multifamily units were gaining in popularity with buyers and developers earlier in the decade when they were mostly being built as owner-occupied condominium units.

Single family detached units also had an impressive total in 2015 with 855 units proposed, the highest total over the last ten years. Detached units are not the dominant segment they used to be, but the overall recovery of the market has not left this category out. It should be noted that dramatic swings from one year to the next are not unusual, especially in a period of low activity when a couple of major developments can really affect the annual comparisons.

**Proposed Residential Units by Type, 2006 - 2015**



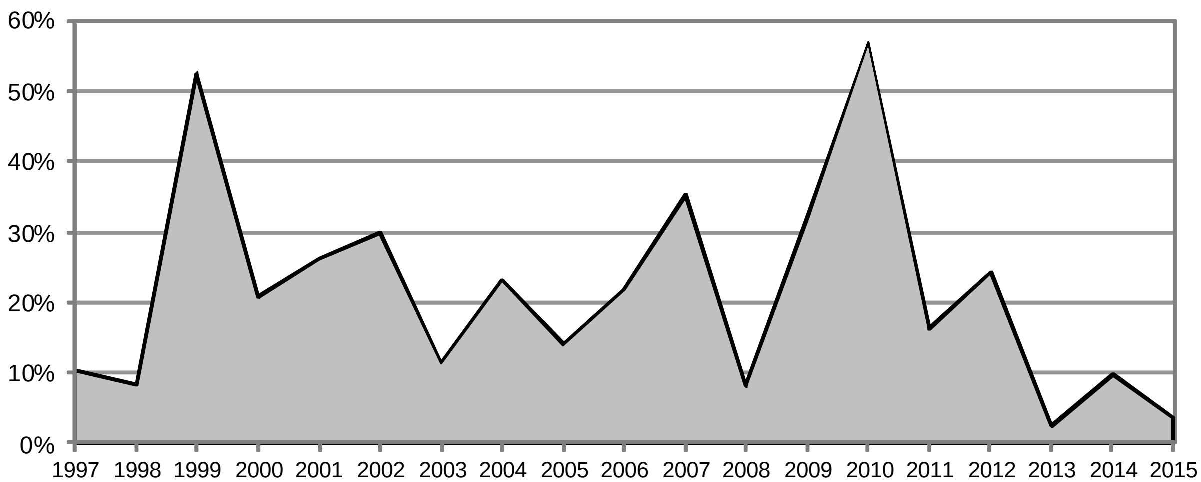

**Proposed Development of Residential Housing Units, 2014 - 2015**

| Housing Type | 2014 | 2015 | Change |
|---|---|---|---|
| Single Family Detached | 433 | 855 | 97% |
| Single Family Attached | 1,207 | 693 | -43% |
| Multifamily | 830 | 2,541 | 206% |

### Age-Restricted Housing Development

There were 143 age-restricted units proposed in 2015. These were all multifamily units, with most of them coming from an expansion of The Hill at Whitemarsh and the Enclave at Kerlin Farm in Cheltenham. Age-restricted developments appear to be declining in popularity as far as development submissions go. The percent of all housing proposed attributed to age-restricted units has been at or under 10% each of the last three years. Since 1996, the average annual percentage has been about 21%. Developers and municipalities may be giving more consideration to "age-targeted" developments that provide amenities and design consistent with the needs of active adults while not mandating a specific age cutoff to potential residents.

**Proposed Age-Restricted Housing as a Percentage of Total Housing Units, 1997-2015**



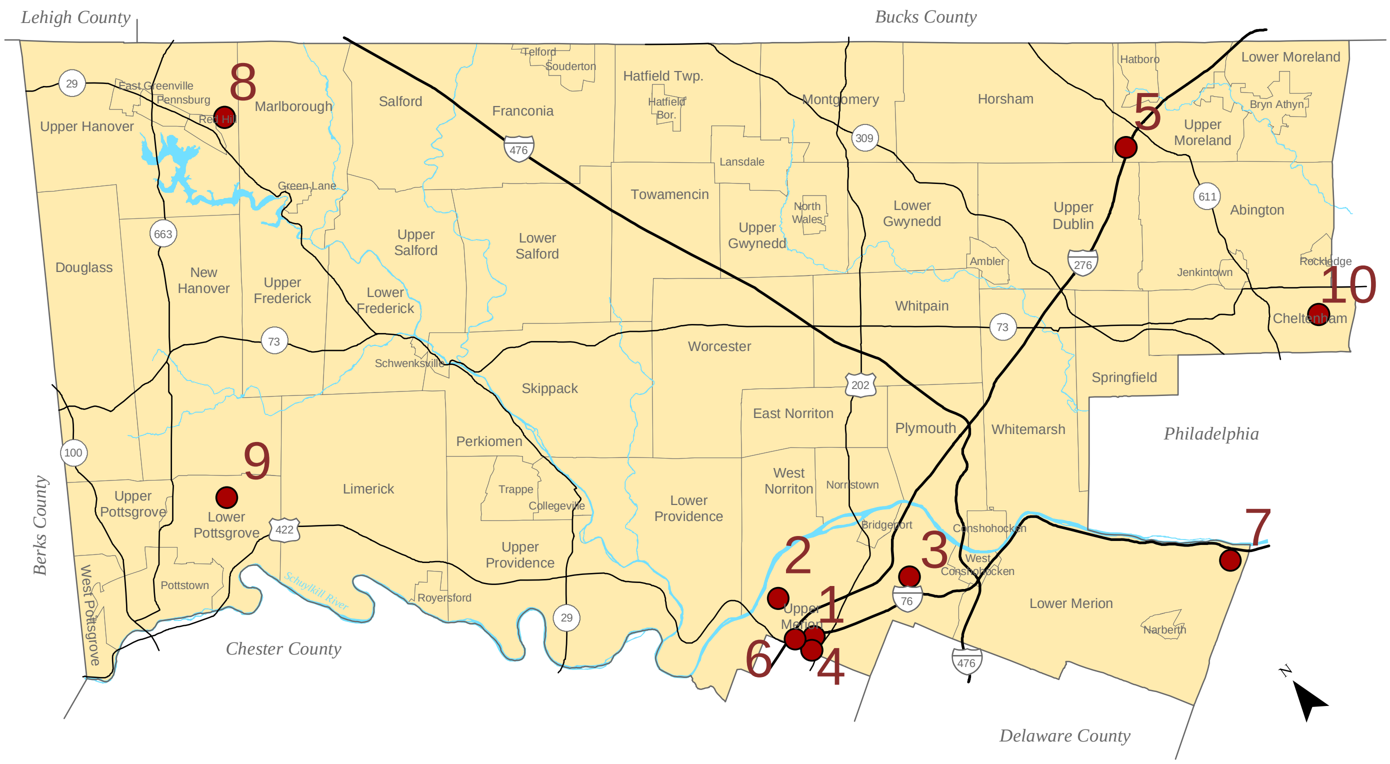

### Largest Residential Proposals

The list of the largest residential proposals on the following page emphasizes how multifamily housing types were the strongest category in 2015. The top seven proposals were multifamily developments that represent infill development opportunity in and around existing employment centers.

The largest proposals were all in Upper Merion Township. While three of the developments were in the Village at Valley Forge, two others were in areas formerly recognized as business parks. The 751 Vandenburg Road proposal takes advantage of new mixed use zoning allowed in the King of Prussia Business Park. The 2901 Renaissance Boulevard proposal is located at the edge of the Renaissance Corporate Center, but it also lies adjacent to the Hughes Park Station of the Norristown High Speed Line making a case for residential transit-oriented development.

Other large multifamily proposals were found near office parks in Willow Grove and Bala Cynwyd, showing how municipalities and developers are embracing the opportunity to redefine the suburban office paradigms of the past.

## Location of Top Ten Largest Residential Proposals, 2015




## Montgomery County Largest Residential Proposals, 2015

| Development Name | | Units | Type | Municipality |
|---|---|---|---|---|
| 1. | 401 N. Gulph Road | 471 | MF | Upper Merion |
| 2. | 751 Vandenburg Road | 311 | MF | Upper Merion |
| 3. | 2901 Renaissance Boulevard | 300 | MF | Upper Merion |
| 4. | Gulph Road & Goddard Boulevard | 276 | MF | Upper Merion |
| 5. | 2405 Maryland Road | 246 | MF | Upper Moreland |
| 6. | Bozzuto Village at Valley Forge | 232 | MF | Upper Merion |
| 7. | 150 Monument Road | 206 | MF | Lower Merion |
| 8. | Kershner Tract | 200 | SFA | Red Hill |
| 9. | Spring Valley Farms | 178 | SFD | Lower Pottsgrove |
| 10. | Ashbourne Meadows | 166 | SFA / SFD | Cheltenham |

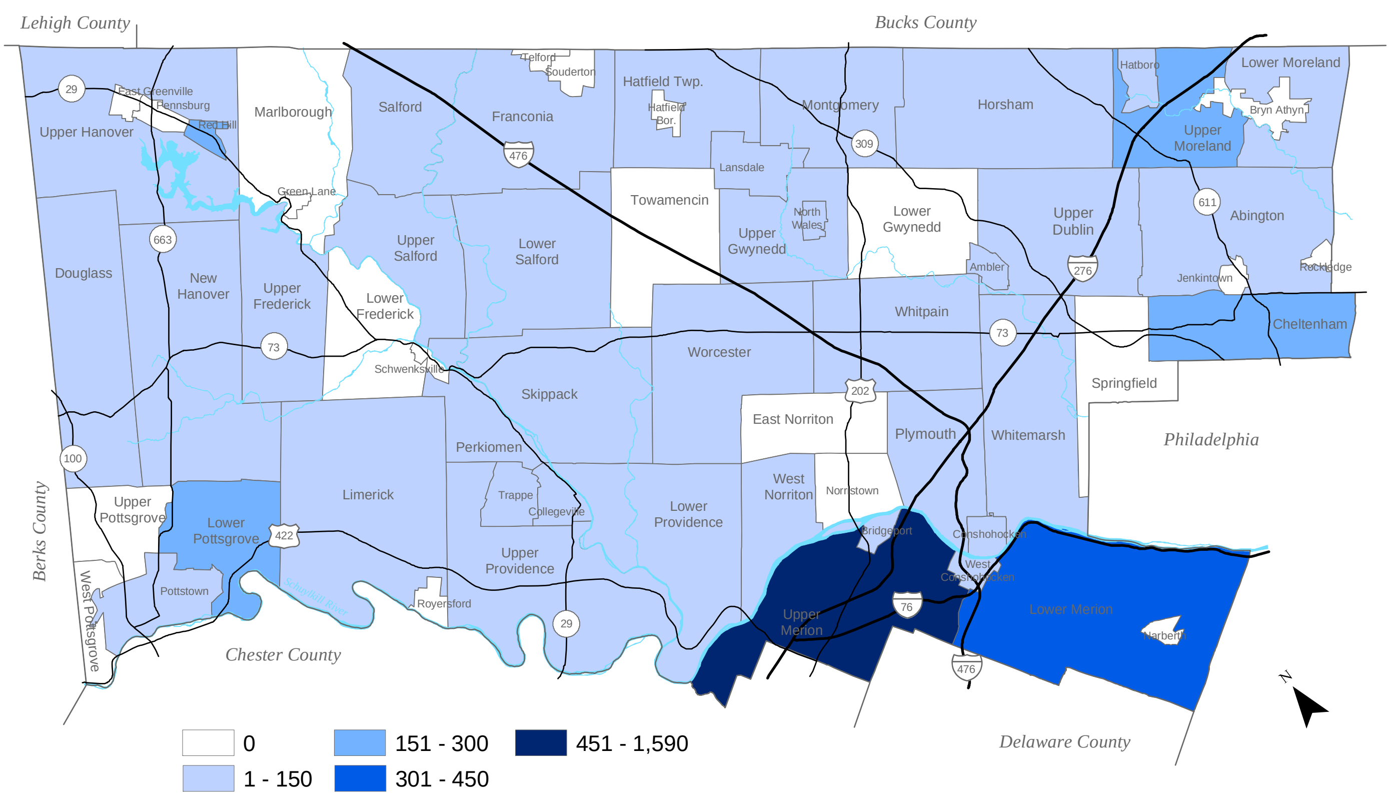
### Residential Units Proposed for Development by Municipality

The table on the following page lists proposed residential unit totals by type for each municipality. Upper Merion received the most residential activity by far due to the collection of multifamily projects being planned. Upper Moreland, Cheltenham, and Red Hill were the only other municipalities to reach at least 200 units proposed.

Geographically, the countywide map below shows a continuation of the trend that eastern and central municipalities are just as likely to receive a good amount of residential activity as the growing municipalities in the western half of the county. Today, redevelopment opportunities and infill development are enticing developers as much as the open greenfields in the county's outer suburban ring that drove suburban growth over the last half century.

About a third of the county's municipalities were quiet in terms of new residential activity, with 21 of the county's 62 municipalities not receiving a new residential proposal in 2015.

**Proposed Housing Units by Municipality, 2015**



## Montgomery County Proposed Residential Units by Municipality, 2015

| Municipality | Total | Detached | Attached | Multifamily |
|---|---|---|---|---|
| Abington | 82 | 12 | 2 | 68 |
| Ambler | 2 | 2 | 0 | 0 |
| Bridgeport | 3 | 1 | 2 | 0 |
| Bryn Athyn | 0 | 0 | 0 | 0 |
| Cheltenham | 245 | 90 | 76 | 79 |
| Collegeville | 3 | 3 | 0 | 0 |
| Conshohocken | 6 | 2 | 4 | 0 |
| Douglass | 45 | 45 | 0 | 0 |
| East Greenville | 0 | 0 | 0 | 0 |
| East Norriton | 0 | 0 | 0 | 0 |
| Franconia | 3 | 3 | 0 | 0 |
| Green Lane | 0 | 0 | 0 | 0 |
| Hatboro | 72 | 0 | 72 | 0 |
| Hatfield Borough | 0 | 0 | 0 | 0 |
| Hatfield Township | 71 | 12 | 59 | 0 |
| Horsham | 21 | 21 | 0 | 0 |
| Jenkintown | 0 | 0 | 0 | 0 |
| Lansdale | 10 | 2 | 2 | 6 |
| Limerick | 91 | 6 | 85 | 0 |
| Lower Frederick | 0 | 0 | 0 | 0 |
| Lower Gwynedd | 0 | 0 | 0 | 0 |
| Lower Merion | 427 | 9 | 39 | 379 |
| Lower Moreland | 2 | 2 | 0 | 0 |
| Lower Pottsgrove | 178 | 178 | 0 | 0 |
| Lower Providence | 22 | 22 | 0 | 0 |
| Lower Salford | 123 | 16 | 107 | 0 |
| Marlborough | 0 | 0 | 0 | 0 |
| Montgomery | 42 | 26 | 16 | 0 |
| Narberth | 0 | 0 | 0 | 0 |
| New Hanover | 3 | 3 | 0 | 0 |
| Norristown | 0 | 0 | 0 | 0 |

| Municipality | Total | Detached | Attached | Multifamily |
|---|---|---|---|---|
| North Wales | 6 | 6 | 0 | 0 |
| Pennsburg | 0 | 0 | 0 | 0 |
| Perkiomen | 4 | 4 | 0 | 0 |
| Plymouth | 84 | 81 | 3 | 0 |
| Pottstown | 43 | 0 | 0 | 43 |
| Red Hill | 200 | 0 | 200 | 0 |
| Rockledge | 0 | 0 | 0 | 0 |
| Royersford | 0 | 0 | 0 | 0 |
| Salford | 1 | 1 | 0 | 0 |
| Schwenksville | 0 | 0 | 0 | 0 |
| Skippack | 1 | 1 | 0 | 0 |
| Souderton | 0 | 0 | 0 | 0 |
| Springfield | 0 | 0 | 0 | 0 |
| Telford | 0 | 0 | 0 | 0 |
| Towamencin | 0 | 0 | 0 | 0 |
| Trappe | 50 | 20 | 0 | 30 |
| Upper Dublin | 43 | 43 | 0 | 0 |
| Upper Frederick | 1 | 1 | 0 | 0 |
| Upper Gwynedd | 1 | 1 | 0 | 0 |
| Upper Hanover | 107 | 107 | 0 | 0 |
| Upper Merion | 1,590 | 0 | 0 | 1,590 |
| Upper Moreland | 246 | 0 | 0 | 246 |
| Upper Pottsgrove | 0 | 0 | 0 | 0 |
| Upper Providence | 3 | 3 | 0 | 0 |
| Upper Salford | 15 | 15 | 0 | 0 |
| West Conshohocken | 16 | 0 | 16 | 0 |
| West Norriton | 125 | 79 | 0 | 46 |
| West Pottsgrove | 0 | 0 | 0 | 0 |
| Whitemarsh | 64 | 0 | 10 | 54 |
| Whitpain | 2 | 2 | 0 | 0 |
| Worcester | 36 | 36 | 0 | 0 |
| **Totals** | **4,089** | **855** | **693** | **2,541** |

# Section Four

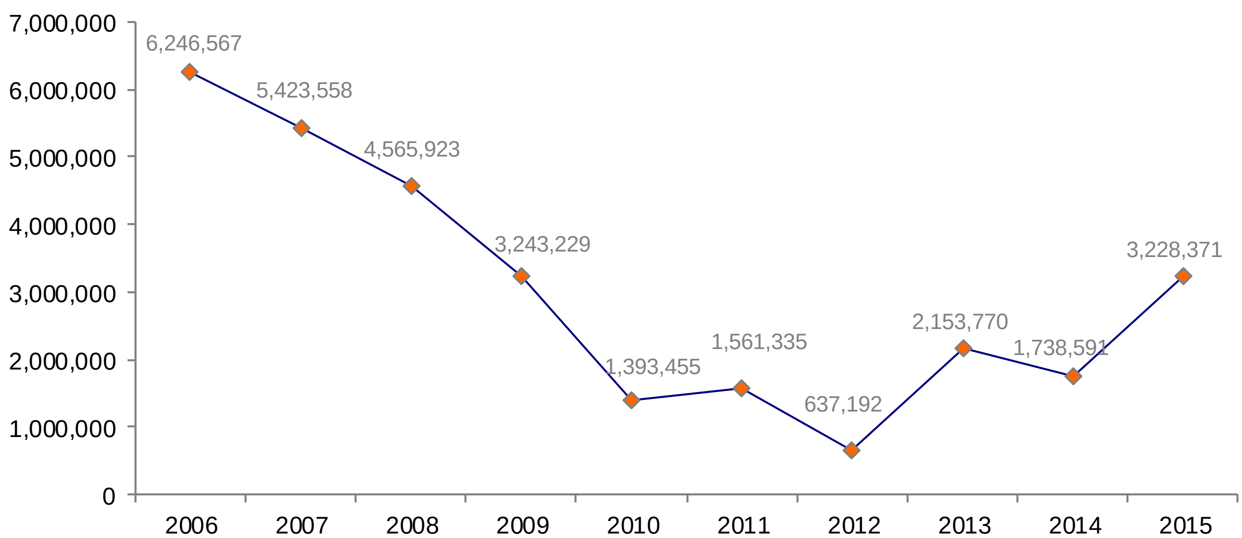
## Nonresidential Submissions

### Proposed Nonresidential Development

Nonresidential development includes retail commercial, office, industrial, and institutional uses. The institutional category includes hospitals, schools, skilled nursing facilities, and churches. Independent living units within continuing care facilities are not included in these totals, but are counted as residential units instead. A single continuing care facility can have any number of detached, attached, or multifamily units. If the facility includes an assisted living and common area, the square footage of that building and an estimate of the land area is included in our summation of institutional land development. Municipal land uses have their own separate land use category and are not included in institutional land use. Recreational land uses are also not counted in the nonresidential total.

In 2015, the amount of nonresidential square feet proposed for development almost doubled from the year before and reached its highest total in the last six years. The total, 3,228,371 square feet, is a promising sign that the economy and market for nonresidential development is improving. Putting recent amounts in perspective, the total square footage of nonresidential development proposed never dipped below 5 million square feet between 1996 and 2007.

**Proposed Nonresidential Square Footage, 2006 to 2015**



## Nonresidential Proposals by Type

Commercial development proposals increased by 30% in 2015. It was the most active nonresidential category during the year, but not due to one overwhelming proposal. A mix of neighborhood shopping centers and stand-alone commercial businesses contributed towards the total. New shopping centers proposed include Centre Square Commons in Whitpain, Spring House Village in Lower Gwynedd, and the Shoppes at Upper Providence. The largest commercial development was for a Gander Mountain outdoors shop in Upper Providence. Other developments include a Lifetime Fitness in Upper Dublin, a Bergey's Truck Center in Franconia, a Lexus dealership in Upper Moreland, and a self-storage facility in Upper Providence.

### Proposed Development of Nonresidential Square Footage, 2014 - 2015

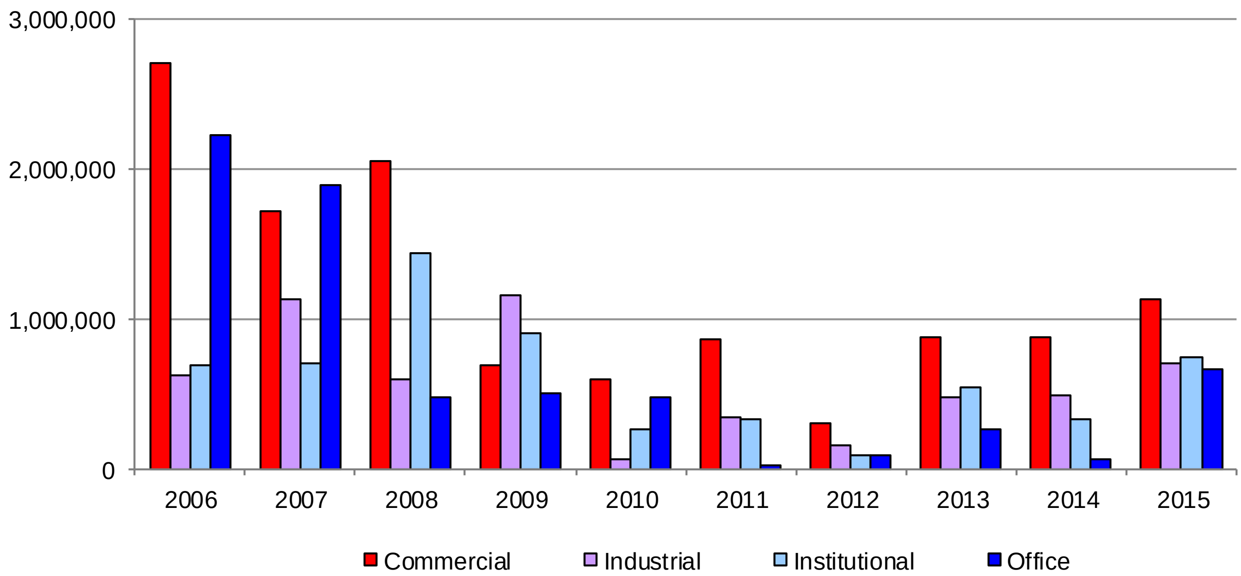
| Type | 2014 | 2015 | Change |
|---|---|---|---|
| Commercial | 871,580 | 1,129,259 | 30% |
| Industrial | 482,530 | 700,878 | 45% |
| Institutional | 322,418 | 736,785 | 129% |
| Office | 62,063 | 661,449 | 966% |
| **Total** | **1,488,532** | **3,228,371** | **86%** |

Industrial square footage proposals increased by 45% in 2015, with over 700,000 square feet proposed. This was mostly attributed to a pair of development proposals in Hatfield Township. The largest was for 350,000 square feet of new flex buildings in the Oak Tree Business Center. The other proposal was for an expansion of the Penn Color manufacturing campus by 234,933 square feet.

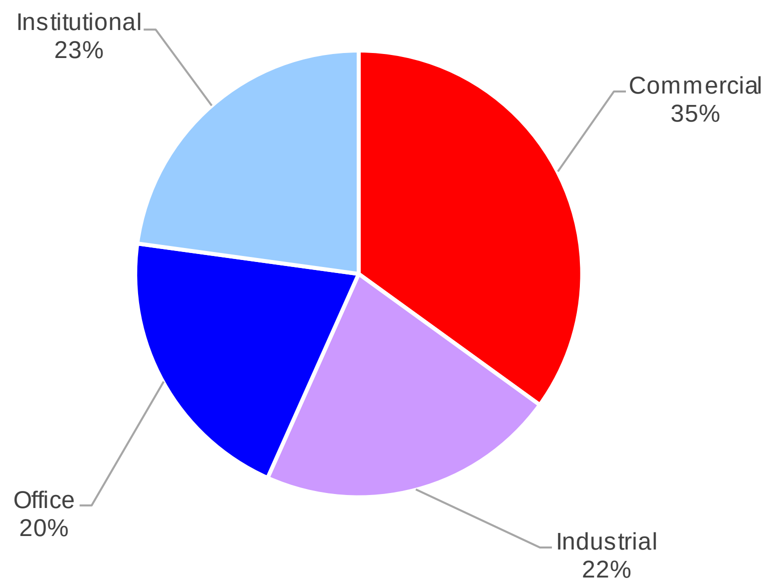
Institutional proposals more than doubled in 2015, and also accounted for more than 700,000 square feet. This category tends to swing more wildly than the others from year to year due to the impact of large school, church, or health care-related proposals that come and go. The largest proposal was for a 207,418 square foot expansion to Bryn Mawr Hospital in Lower Merion. That was followed by new student housing for Penn State Abington, which would create the first campus housing for that local branch of the Penn State University system.

Office proposals grew the most of any nonresidential category, which may not be a surprise given the very low total from the year before. However, the 661,449 square feet proposed marks s significant departure from at least the last five years and offers some hope that this struggling sector may finally be ready for new investment. The major office proposals from 2015 were based off of existing high profile office areas. The largest was for a new office building along the Conshohocken waterfront, although it would extend that district further west than it currently rests. The second largest was for a new phase of the Arborcrest development, Woodlands I, in Whitpain. The Arborcrest campus is a reinvention of the former Unisys facilities and has become known for offering new amenities in a revitalized suburban office setting.

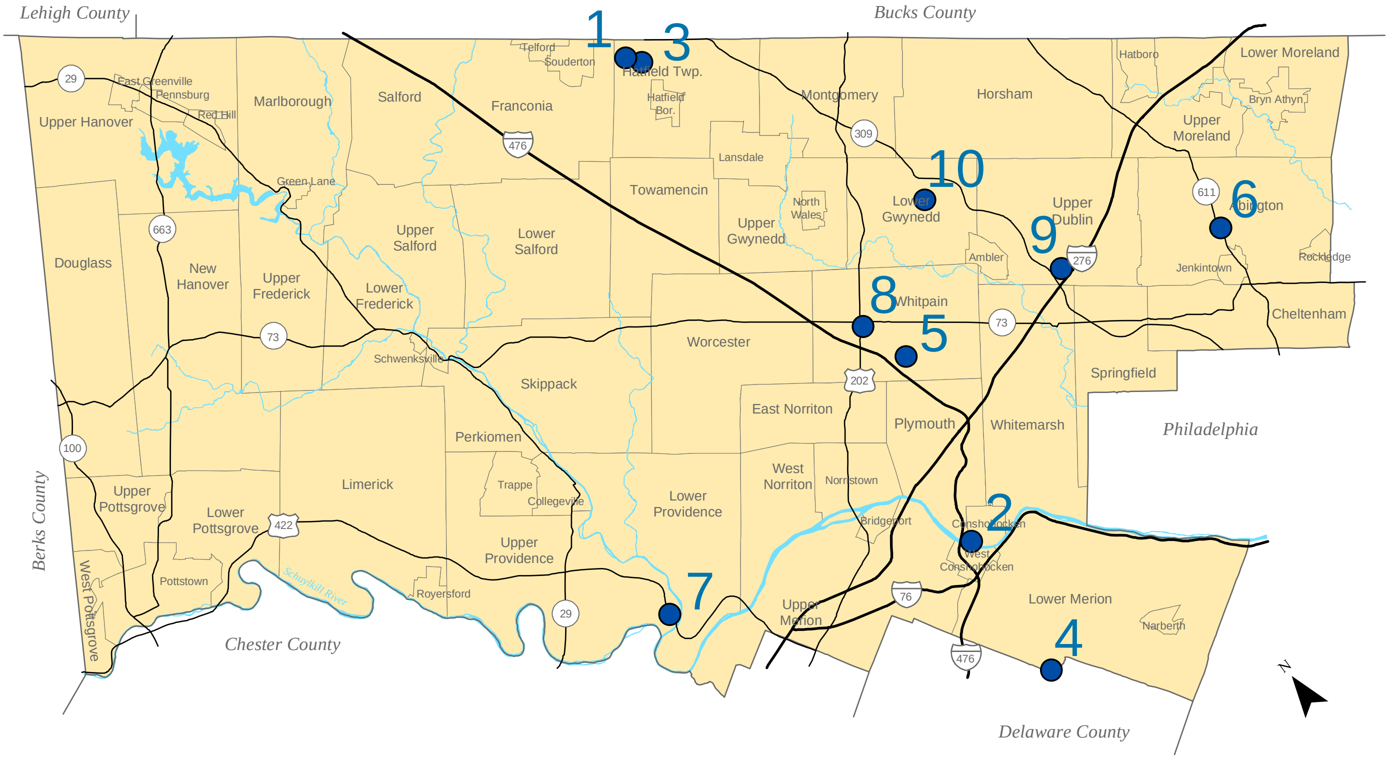
### Proposed Nonresidential Square Feet by Development Type, 2006 - 2015




### Proposed Nonresidential Square Footage, 2015



## Location of Top Ten Largest Nonresidential Proposals, 2015




## Montgomery County Largest Nonresidential Proposals, 2015

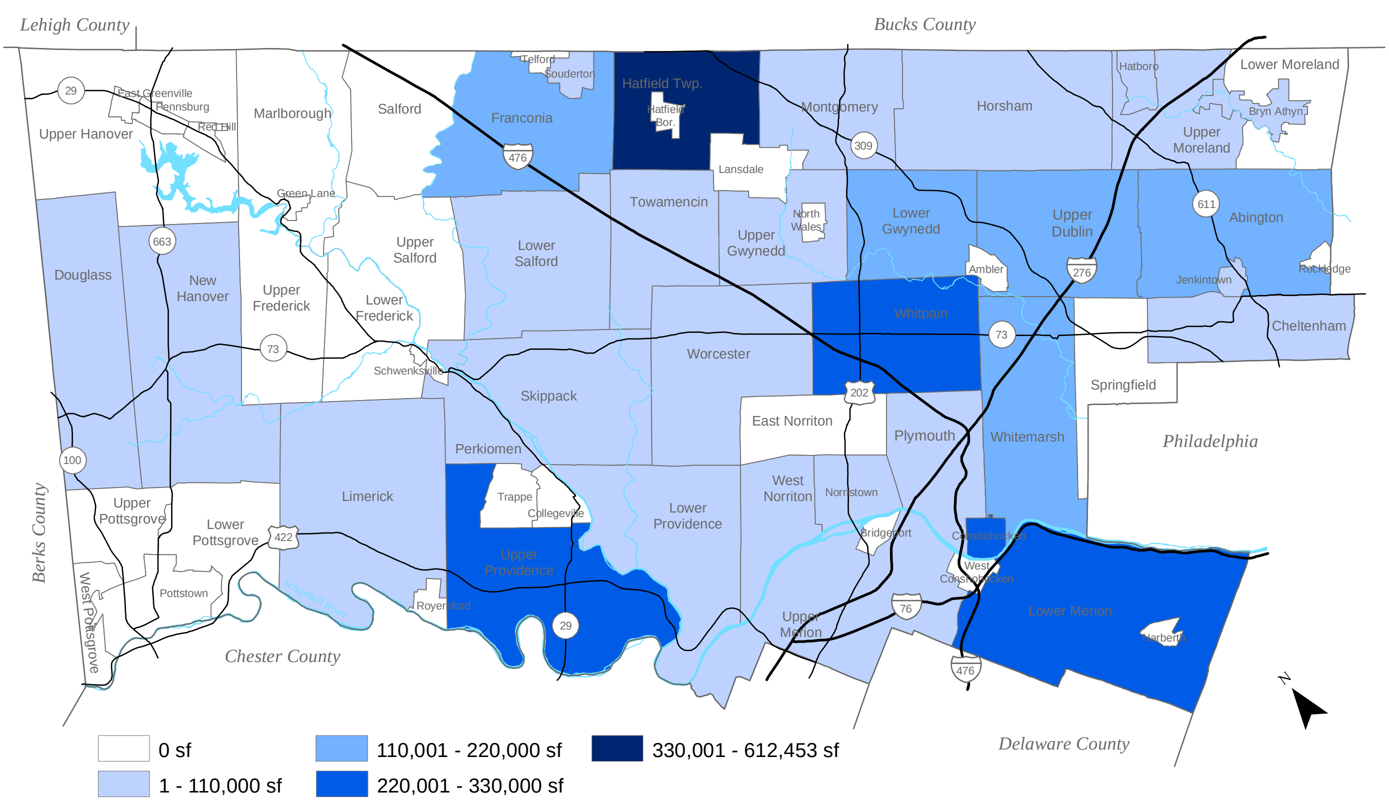
| | Development Name | Square Feet | Type | Municipality |
|---|---|---|---|---|
| 1. | Oak Tree Business Center | 350,000 | Industrial | Hatfield Township |
| 2. | 400 W. Elm St. Offices | 324,860 | Office | Conshohocken |
| 3. | Penn Color Campus Expansion | 234,933 | Industrial | Hatfield Township |
| 4. | Bryn Mawr Hospital Expansion | 207,418 | Institutional | Lower Merion |
| 5. | Arborcrest - Woodlands I | 200,000 | Office | Whitpain |
| 6. | Penn State Abington Student Housing | 140,850 | Institutional | Abington |
| 7. | Gander Mountain | 136,450 | Commercial | Upper Providence |
| 8. | Centre Square Commons | 122,600 | Commercial | Whitpain |
| 9. | Lifetime Fitness | 114,948 | Commercial | Upper Dublin |
| 10. | Spring House Village Shopping Center | 111,400 | Commercial | Lower Gwynedd |

## Nonresidential Square Footage Proposed for Development by Municipality

The table on the following page lists nonresidential square footage totals by type for each municipality. Hatfield Township received the most square feet in proposals (612,453 square feet) while Conshohocken, Whitpain, and Lower Merion followed with over 300,000 square feet proposed in each municipality.

The countywide map below shows that nonresidential development proposals were still weighted a bit more heavily towards the eastern half of the county, but over the last ten years, nonresidential activity has also been strong along the Rt. 422 corridor and in the North Penn Region (Lansdale and surrounding municipalities).

### Proposed Nonresidential Square Footage by Municipality, 2015



## Proposed Nonresidential Square Footage by Municipality, 2015

| Municipality | Total | Commercial | Industrial | Institutional* | Office |
|---|---|---|---|---|---|
| Abington | *148,001* | 0 | 0 | 140,850 | 7,151 |
| Ambler | *0* | 0 | 0 | 0 | 0 |
| Bridgeport | *0* | 0 | 0 | 0 | 0 |
| Bryn Athyn | *20,632* | 0 | 0 | 20,632 | 0 |
| Cheltenham | *51,085* | 8,085 | 0 | 43,000 | 0 |
| Collegeville | *0* | 0 | 0 | 0 | 0 |
| Conshohocken | *324,860* | 0 | 0 | 0 | 324,860 |
| Douglass | *3,500* | 3,500 | 0 | 0 | 0 |
| East Greenville | *0* | 0 | 0 | 0 | 0 |
| East Norriton | *0* | 0 | 0 | 0 | 0 |
| Franconia | *211,062* | 147,087 | 63,975 | 0 | 0 |
| Green Lane | *0* | 0 | 0 | 0 | 0 |
| Hatboro | *1,380* | 1,380 | 0 | 0 | 0 |
| Hatfield Borough | *0* | 0 | 0 | 0 | 0 |
| Hatfield Township | *612,453* | 27,520 | 584,933 | 0 | 0 |
| Horsham | *45,855* | 14,505 | 31,350 | 0 | 0 |
| Jenkintown | *4,510* | 4,510 | 0 | 0 | 0 |
| Lansdale | *0* | 0 | 0 | 0 | 0 |
| Limerick | *21,730* | 11,730 | 0 | 10,000 | 0 |
| Lower Frederick | *0* | 0 | 0 | 0 | 0 |
| Lower Gwynedd | *182,708* | 111,400 | 0 | 71,308 | 0 |
| Lower Merion | *309,695* | 37,220 | 0 | 252,475 | 20,000 |
| Lower Moreland | *0* | 0 | 0 | 0 | 0 |
| Lower Pottsgrove | *0* | 0 | 0 | 0 | 0 |
| Lower Providence | *1,344* | 0 | 0 | 1,344 | 0 |
| Lower Salford | *3,246* | 0 | 0 | 0 | 3,246 |
| Marlborough | *0* | 0 | 0 | 0 | 0 |
| Montgomery | *37,368* | 23,405 | 0 | 13,963 | 0 |
| Narberth | *0* | 0 | 0 | 0 | 0 |
| New Hanover | *8,520* | 8,520 | 0 | 0 | 0 |
| Norristown | *40,723* | 40,723 | 0 | 0 | 0 |

| Municipality | Total | Commercial | Industrial | Institutional* | Office |
|---|---|---|---|---|---|
| North Wales | *0* | 0 | 0 | 0 | 0 |
| Pennsburg | *0* | 0 | 0 | 0 | 0 |
| Perkiomen | *9,200* | 0 | 9,200 | 0 | 0 |
| Plymouth | *30,151* | 30,151 | 0 | 0 | 0 |
| Pottstown | *0* | 0 | 0 | 0 | 0 |
| Red Hill | *0* | 0 | 0 | 0 | 0 |
| Rockledge | *0* | 0 | 0 | 0 | 0 |
| Royersford | *0* | 0 | 0 | 0 | 0 |
| Salford | *0* | 0 | 0 | 0 | 0 |
| Schwenksville | *0* | 0 | 0 | 0 | 0 |
| Skippack | *9,000* | 0 | 0 | 0 | 9,000 |
| Souderton | *19,939* | 1,456 | 0 | 18,483 | 0 |
| Springfield | *0* | 0 | 0 | 0 | 0 |
| Telford | *0* | 0 | 0 | 0 | 0 |
| Towamencin | *99,487* | 0 | 0 | 99,487 | 0 |
| Trappe | *0* | 0 | 0 | 0 | 0 |
| Upper Dublin | *115,748* | 115,748 | 0 | 0 | 0 |
| Upper Frederick | *0* | 0 | 0 | 0 | 0 |
| Upper Gwynedd | *18,298* | 15,045 | 0 | 3,253 | 0 |
| Upper Hanover | *0* | 0 | 0 | 0 | 0 |
| Upper Merion | *42,249* | 38,829 | 3,420 | 0 | 0 |
| Upper Moreland | *85,862* | 85,862 | 0 | 0 | 0 |
| Upper Pottsgrove | *0* | 0 | 0 | 0 | 0 |
| Upper Providence | *282,305* | 268,305 | 0 | 0 | 14,000 |
| Upper Salford | *0* | 0 | 0 | 0 | 0 |
| West Conshohocken | *0* | 0 | 0 | 0 | 0 |
| West Norriton | *1,158* | 1,158 | 0 | 0 | 0 |
| West Pottsgrove | *0* | 0 | 0 | 0 | 0 |
| Whitemarsh | *128,730* | 10,000 | 8,000 | 28,730 | 82,000 |
| Whitpain | *324,312* | 123,120 | 0 | 0 | 201,192 |
| Worcester | *33,260* | 0 | 0 | 33,260 | 0 |
| Totals | ***3,228,371*** | **1,129,259** | **700,878** | **736,785** | **661,449** |

*Includes institutional and elderly institutional proposals.

# Section Five

Zoning Activity

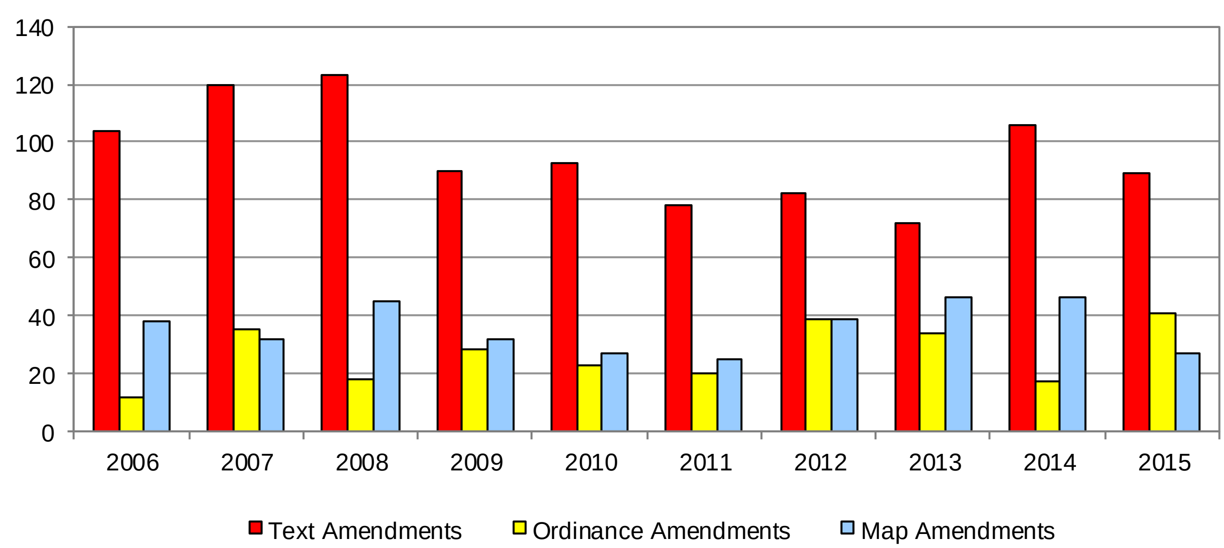
### Zoning Amendments

All 62 municipalities in the county have officially adopted zoning ordinances, including zoning maps. In accordance with the Municipalities Planning Code (MPC), each township and borough is required to submit all proposed zoning ordinance or map amendments to the county Planning Commission for review. These amendments can be minor, involving small changes to the text of the zoning code, or major comprehensive amendments to the entire zoning ordinance.

The Planning Commission received 157 proposed amendments to local zoning code ordinances and zoning maps. This was down from the total last year (169), but on pace with the ten year average of 158.

In 2015, 41 zoning amendments were proposed to change significant portions of an entire ordinance, 89 amendments involved less significant changes to a single district, and another 27 involved map changes. Lower Merion and Upper Merion Townships had the most amendments of all municipalities with 12 and 10 amendments, respectively.

**Montgomery County Proposed Zoning Amendments: 2006 - 2015**



## Zoning Activity by Municipality, 2015

| Municipality | Total | Map Amend. | Ordinance Amend. | Minor Text Amend. |
|---|---|---|---|---|
| Abington | *9* | 0 | 7 | 2 |
| Ambler | *7* | 0 | 2 | 5 |
| Bridgeport | *0* | 0 | 0 | 0 |
| Bryn Athyn | *0* | 0 | 0 | 0 |
| Cheltenham | *5* | 1 | 1 | 3 |
| Collegeville | *0* | 0 | 0 | 0 |
| Conshohocken | *2* | 1 | 0 | 1 |
| Douglass | *0* | 0 | 0 | 0 |
| East Greenville | *0* | 0 | 0 | 0 |
| East Norriton | *2* | 1 | 0 | 1 |
| Franconia | *4* | 1 | 0 | 3 |
| Green Lane | *0* | 0 | 0 | 0 |
| Hatboro | *1* | 0 | 1 | 0 |
| Hatfield Borough | *0* | 0 | 0 | 0 |
| Hatfield Township | *1* | 0 | 1 | 0 |
| Horsham | *7* | 4 | 0 | 3 |
| Jenkintown | *0* | 0 | 0 | 0 |
| Lansdale | *0* | 0 | 0 | 0 |
| Limerick | *1* | 0 | 1 | 0 |
| Lower Frederick | *1* | 0 | 0 | 1 |
| Lower Gwynedd | *8* | 0 | 2 | 6 |
| Lower Merion | *7* | 0 | 2 | 5 |
| Lower Moreland | *1* | 0 | 1 | 0 |
| Lower Pottsgrove | *3* | 0 | 3 | 0 |
| Lower Providence | *7* | 0 | 2 | 5 |
| Lower Salford | *7* | 2 | 0 | 5 |
| Marlborough | *0* | 0 | 0 | 0 |
| Montgomery | *6* | 2 | 1 | 3 |
| Narberth | *3* | 0 | 1 | 2 |
| New Hanover | *0* | 0 | 0 | 0 |
| Norristown | *1* | 0 | 1 | 0 |

| Municipality | Total | Map Amend. | Ordinance Amend. | Minor Text Amend. |
|---|---|---|---|---|
| North Wales | *0* | 0 | 0 | 0 |
| Pennsburg | *0* | 0 | 0 | 0 |
| Perkiomen | *1* | 0 | 0 | 1 |
| Plymouth | *4* | 1 | 0 | 3 |
| Pottstown | *3* | 0 | 0 | 3 |
| Red Hill | *2* | 0 | 2 | 0 |
| Rockledge | *0* | 0 | 0 | 0 |
| Royersford | *0* | 0 | 0 | 0 |
| Salford | *1* | 0 | 0 | 1 |
| Schwenksville | *0* | 0 | 0 | 0 |
| Skippack | *0* | 0 | 0 | 0 |
| Souderton | *2* | 1 | 0 | 1 |
| Springfield | *7* | 3 | 1 | 3 |
| Telford | *1* | 0 | 0 | 1 |
| Towamencin | *10* | 0 | 2 | 8 |
| Trappe | *2* | 0 | 0 | 2 |
| Upper Dublin | *3* | 2 | 0 | 1 |
| Upper Frederick | *3* | 0 | 1 | 2 |
| Upper Gwynedd | *3* | 1 | 0 | 2 |
| Upper Hanover | *5* | 1 | 2 | 2 |
| Upper Merion | *4* | 1 | 2 | 1 |
| Upper Moreland | *6* | 2 | 1 | 3 |
| Upper Pottsgrove | *0* | 0 | 0 | 0 |
| Upper Providence | *2* | 0 | 0 | 2 |
| Upper Salford | *1* | 0 | 1 | 0 |
| West Conshohocken | *2* | 0 | 1 | 1 |
| West Norriton | *3* | 0 | 0 | 3 |
| West Pottsgrove | *0* | 0 | 0 | 0 |
| Whitemarsh | *4* | 2 | 0 | 2 |
| Whitpain | *4* | 1 | 1 | 2 |
| Worcester | *1* | 0 | 1 | 0 |
| **Total** | ***157*** | **27** | **41** | **89** |

# Section Six
## Conclusion

### Submissions
The number of submissions to the Planning Commission increased in 2015 and reached the highest total in the last six years. Activity is up after a three year post-recession dip in development activity. As the economy continues to improve, older projects that had stalled may see new life along with additional opportunities. There was also an increase in the number of approved plans in 2015 compared to the year before and a seven year high was achieved. A return back to the time of 1,000 submissions in the near future is not expected; however, the improving economy and gradual updates to infrastructure could sustain a period of continued growth.

### Acreage Consumed
The amount of acreage proposed for development in 2015 grew from the previous year, and it almost tripled the annual post-recession totals from 2010 to 2012. Proposals in terms of acreage may be expected to stay lower than in the past as fewer single-family detached housing developments on unimproved land are proposed in favor of more higher density townhome and multifamily developments. Nonresidential activity is increasingly taking place on already developed land or as expansions to existing developments. This may also reduce acreage consumed as compared to new office campuses or shopping centers more common in the 1980s and 90s.

### Residential
Residential land development proposals really exploded in 2015 and set a ten year record for units proposed. The 4,089 units proposed more resembles the active markets at the turn of the new century and in the 1990s, but the big difference is how multifamily housing is the dominant form. Multifamily units are benefitting from the robust market for apartment rentals in the Philadelphia Region. A newer trend in both younger and older generations seeking to live near employment, major road access, retail centers, and public transit, has also opened up many redevelopment and mixed use opportunities.

Upper Merion Township was the epicenter for multifamily development proposals due to the momentum with the Village at Valley Forge, but also with rezoning in the King of Prussia Business Park and transit-oriented development in the township's more eastern business area. Upper Moreland and Lower Merion also saw major multifamily projects proposed near employment centers in 2015.

### Nonresidential

Proposed nonresidential square footage also increased in 2015, and every one of the major sectors realized a record level of square footage proposed going back at least five years. The office sector in particular showed signs of a rebound after numerous years of very little activity. The office market still faces challenges, but if the economy continues to improve and municipalities address the changing needs and desires of companies, this is a sector that could see new opportunities over time.

The commercial sector still saw the highest square footage proposed, which is usually the case. A handful of new neighborhood shopping centers were proposed along with some large scale single-occupancy buildings. The industrial sector also surprised with two of the three largest nonresidential projects proposed, both in Hatfield Township.

### Zoning

The Planning Commission received 157 proposed amendments to either the zoning code or zoning map of local municipalities. This was a small decrease from the prior year, but it still represents a similar figure to the average number of zoning submissions over the last ten years. More substantial zoning ordinance amendments were much higher in 2015 though, while Zoning map amendments and minor zoning text amendments both decreased.

Montgomery County Planning Commission
Montgomery County, Pennsylvania