



2010 Annual Summary

Subdivision, Land Development, and Zoning Activity



Montgomery County, Pennsylvania

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2010 Annual Summary

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This report summarizes the subdivision, land development, and zoning proposals received by the Montgomery County Planning Commission in 2010. The proposals were reviewed under the requirements of the Pennsylvania Municipalities Planning Code (Act 247).

The information and statistics in this report reflect proposals and approved 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. 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 unit number and type, nonresidential acreage and square footage and a brief discussion of zoning text and map amendments submitted for review.

This report also includes information on approved plans (by the municipality) that have been submitted to the county for final plan recording. Information from approved plans is presented for the number of development proposals, the number of residential units, and the amount of nonresidential square footage. It should be noted that these approved plans were not necessarily submitted in 2010. In fact, many had been submitted in previous years and were under review by local municipalities. Once plans are approved, applicants require building permits and other necessary permits before construction begins.

The report also contains a brief summary of zoning 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.

Beginning in 2004, the Annual Summary includes analysis of land development with regard to the *County Comprehensive Plan*. The location, type, and intensity of development has been compared to county plan goals in each applicable section of this report.

Note to the 2010 Annual Summary:

The totals in this report do not include a development that received a court-ordered approval in 2006 resulting in final plan recording in 2010. The development is a proposed mixed use town center titled "The Village at Valley Forge" located in Upper Merion Township. Because approval was granted through the courts after extensive litigation, it was never reviewed by the county. The court order ultimately allows up to 2,000 residential units, 500 hotel rooms and 1,000,000 square feet of leasable commercial space on the 135 acre site. Phase one has been recorded as a final plan and includes approximately 310 residential units, a 250 room hotel building, and 425,000 square feet of commercial space. While these numbers are not insignificant, they do not change the overall trends observed in the following report, but the reader should be aware of this unique development.

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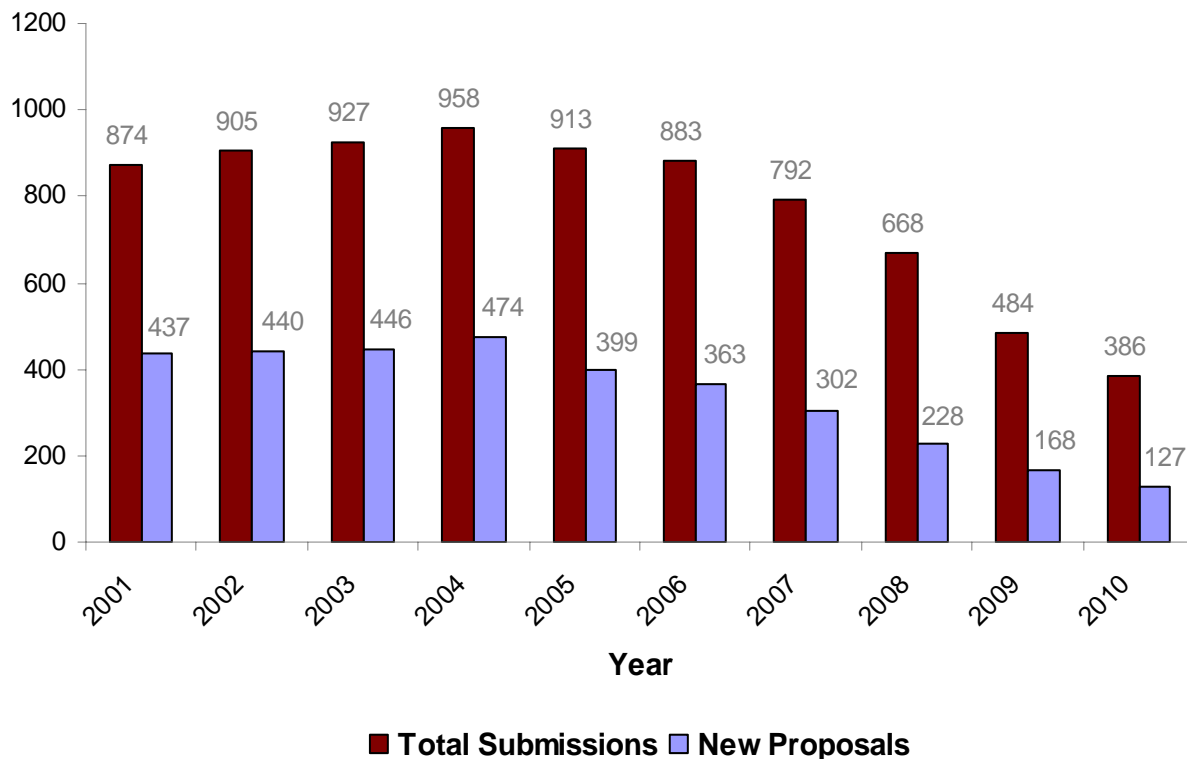
Section One

Number of Submissions

In 2010 the Planning Commission received 386 applications for subdivision, land development, and zoning ordinance and map amendments. This was 20% less than in 2009. The total number of submissions has decreased each of the last six years, dropping 60% from 2004 to 2010. This is the lowest it has been since at least 1970, when comparable county records began being recorded.

A development proposal can undergo many revised submissions before it is either approved or the applicant gives up on the project. The 2010 submissions include 127 new proposals for land developments or subdivisions that had not been previously submitted with similar land use and density components.

Total Annual Submissions, 2001 to 2010



Section One: Number of Submissions

Montgomery County Submissions by Municipality, 2010

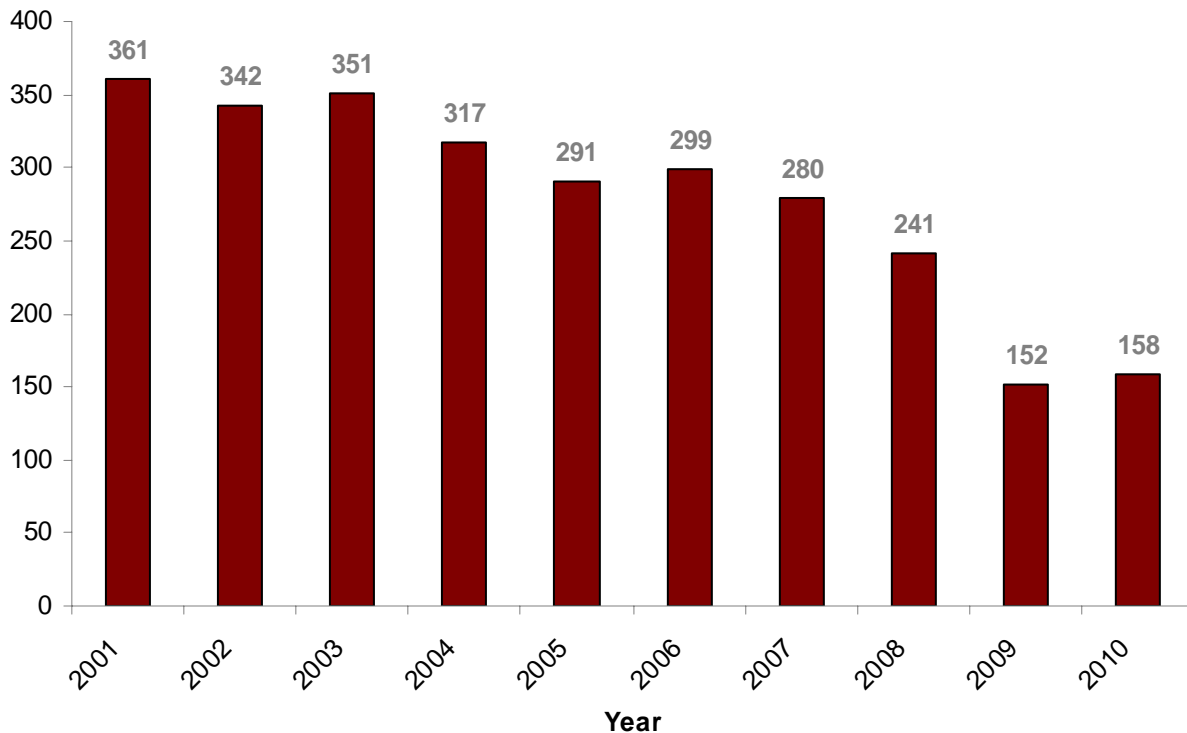
Municipality	Total	Land Developments	Subdivisions	Municipality	Total	Land Developments	Subdivisions
Abington	11	4	4	North Wales	0	0	0
Ambler	6	1	1	Pennsburg	1	1	0
Bridgeport	1	0	1	Perkiomen	2	0	0
Bryn Athyn	0	0	0	Plymouth	2	0	0
Cheltenham	8	1	1	Pottstown	3	1	2
Collegeville	3	2	0	Red Hill	4	2	1
Conshohocken	7	3	3	Rockledge	1	0	1
Douglass	5	0	2	Royersford	1	0	0
East Greenville	2	1	1	Salford	4	0	1
East Norriton	9	4	2	Schwenksville	1	1	0
Franconia	9	1	7	Skippack	2	2	0
Green Lane	1	1	0	Souderton	2	0	1
Hatboro	2	2	2	Springfield	7	0	3
Hatfield Borough	3	2	4	Telford	0	0	0
Hatfield Township	12	0	0	Towamencin	2	2	0
Horsham	11	5	2	Trappe	2	0	1
Jenkintown	1	0	0	Upper Dublin	13	2	5
Lansdale	5	3	1	Upper Frederick	2	1	1
Limerick	19	7	2	Upper Gwynedd	7	1	3
Lower Frederick	3	0	2	Upper Hanover	7	2	3
Lower Gwynedd	6	0	2	Upper Merion	4	3	0
Lower Merion	34	11	1	Upper Moreland	11	4	1
Lower Moreland	10	3	1	Upper Pottsgrove	8	2	4
Lower Pottsgrove	11	7	0	Upper Providence	15	5	4
Lower Providence	5	3	0	Upper Salford	1	0	0
Lower Salford	11	4	2	West Conshohocken	1	1	0
Marlborough	6	2	1	West Norriton	4	1	1
Montgomery	9	4	2	West Pottsgrove	3	1	0
Narberth	1	0	0	Whitemarsh	9	5	1
New Hanover	12	4	8	Whitpain	11	3	2
Norristown	13	5	0	Worcester	19	6	8
Totals	385	126	95				

Note: Municipal totals include zoning-related submissions and special reviews. County total does not include an additional review for the Upper Southampton (Chester County) Comprehensive Plan.

Approved Plans

In 2010, 158 plans were approved by their respective municipalities and recorded as a final plan. This was slightly more than the year before (152), but both years still amount to the lowest totals of approved plans since approvals were recorded beginning in 1990, an indication of the general slowing of development activity in the county. There are still many plans in the pipeline that could ultimately gain approval, but if the lack of proposals continues, then it will be unlikely that approvals make much of a comeback.

Total Plans Approved, 2001 to 2010



Conclusion

After reaching a ten-year high in 2004, the number of submissions to the Planning Commission has declined each year, but it reached a historical low point by dropping 20 percent in 2010. From 2001 to 2007, the average number of submissions each year was almost 900. The deepening declines in the last three years are the result of a staggering economy marked by high unemployment and severely tightening financial constrictions from creditors. Some prior plans, even if approved, lay dormant due to developers having either their own financial issues or just not being able to get necessary credit from lending institutions. The remainder of this report will elaborate on the type, location, and intensity of land development proposals in the county with comparisons to ten-year trends. Also included is an analysis with regard to the *County Comprehensive Plan* goals and policies.

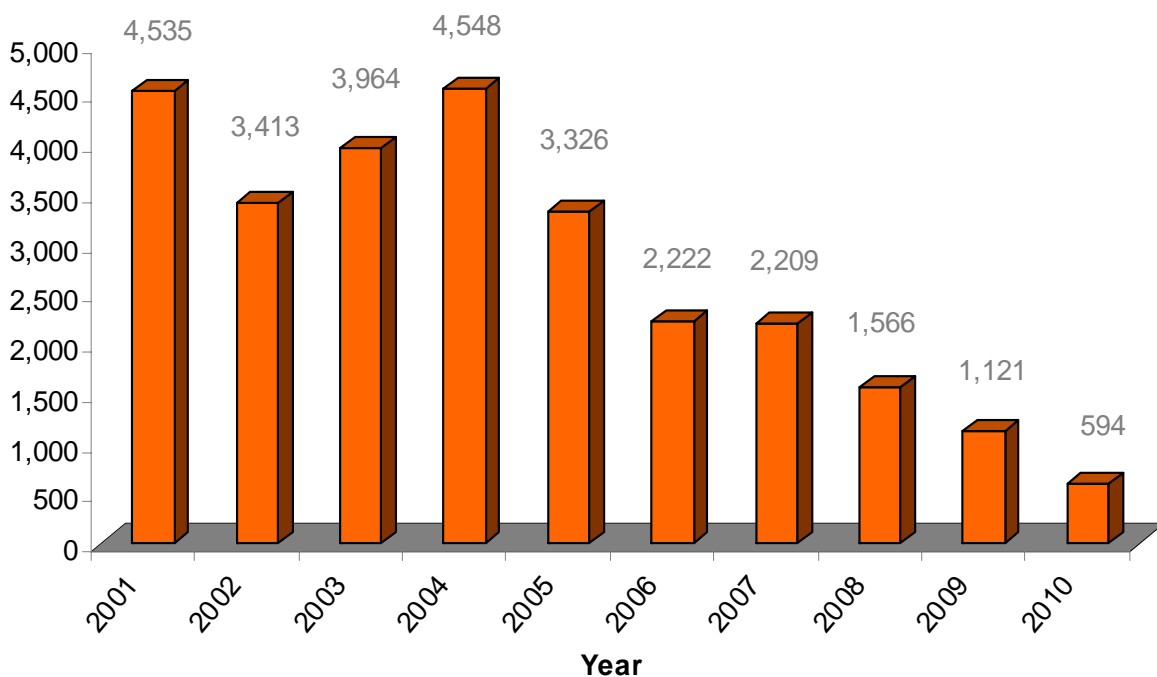
Section Two

Acres of Submissions

Countywide Acres Proposed for Development

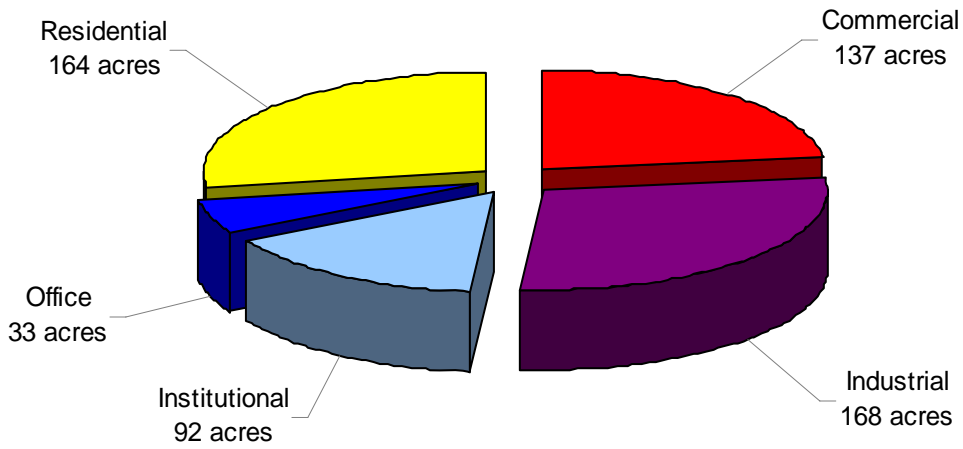
The total amount of land proposed for development in 2010, which excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates, transportation or utilities, was 594 acres. This represents a decline of 47% from 2009 to 2010. The total number of acres proposed for development has decreased each of the last six years, dropping 87% since 2004. The acreage proposed in 2010 is the lowest annual total since at least 1970 when comparable county records began being recorded.

Acres Proposed for Development, 2001 to 2010



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, but in 2010, only 28% of acreage proposed was for residential use with industrial uses barely edging out residential at 29% and commercial uses not far behind with 23% of acreage proposed for development.

Acres Proposed for Development by Type, 2010



The amount of land proposed this year for residential use, 164 acres, was lower than at any other time since 1970 when comparable county records began being recorded. Proposed residential acreage used to consume several thousand acres per year. Housing proposals are at a historic low, but another cause in the reduction of acreage is the decline in single family detached housing proposals (see section 3). Detached homes normally consume the most acres per unit of all housing types.

Total nonresidential acreage has been greater than residential acreage in each of the last five years, although this has not always been the case as the frequency of specific types of development are generally cyclical based on the current market at the time for various sectors.

Acres Proposed for Development by Municipality

The table on the opposite page shows the dispersal of proposed acres throughout the county. In 2010, New Hanover Township led the county with 149 acres proposed for development, two-thirds of that total going towards a proposed quarry. Other leading municipalities included Horsham, Lower Merion, and Lower Salford Townships.

Section Two : Acreage of Submissions

Montgomery County Acres Proposed For Development by Municipality, 2010

Municipality	Total	Nonresidential	Residential
Abington	10	6	3
Ambler	1	0	1
Bridgeport	0	0	0
Bryn Athyn	0	0	0
Cheltenham	10	10	0
Collegeville	0	0	0
Conshohocken	1	0	1
Douglass	7	0	7
East Greenville	6	5	1
East Norriton	16	15	0
Franconia	7	0	7
Green Lane	2	2	0
Hatboro	2	2	0
Hatfield Borough	0	0	0
Hatfield Township	14	10	4
Horsham	38	19	19
Jenkintown	0	0	0
Lansdale	4	3	1
Limerick	26	17	9
Lower Frederick	3	0	3
Lower Gwynedd	4	0	4
Lower Merion	35	31	4
Lower Moreland	2	2	0
Lower Pottsgrove	28	15	13
Lower Providence	20	8	12
Lower Salford	30	30	0
Marlborough	5	5	0
Montgomery	14	13	1
Narberth	0	0	0
New Hanover	149	144	5
Norristown	0	0	0

Municipality	Total	Nonresidential	Residential
North Wales	0	0	0
Pennsburg	15	0	15
Perkiomen	0	0	0
Plymouth	0	0	0
Pottstown	0	0	0
Red Hill	2	2	0
Rockledge	0	0	0
Royersford	1	0	1
Salford	0	0	0
Schwenksville	0	0	0
Skippack	2	2	0
Souderton	0	0	0
Springfield	7	3	4
Telford	0	0	0
Towamencin	15	15	0
Trappe	0	0	0
Upper Dublin	4	4	0
Upper Frederick	0	0	0
Upper Gwynedd	19	9	9
Upper Hanover	20	11	9
Upper Merion	14	14	0
Upper Moreland	3	1	2
Upper Pottsgrove	0	0	0
Upper Providence	14	9	4
Upper Salford	0	0	0
West Conshohocken	0	0	0
West Norriton	8	8	0
West Pottsgrove	4	4	0
Whitemarsh	13	11	2
Whitpain	7	2	5
Worcester	15	0	15
Totals	594	430	164

Note: Figures include age restricted development and exclude agricultural, residential country estates, municipal, open space, recreation, transportation and utility acreage.

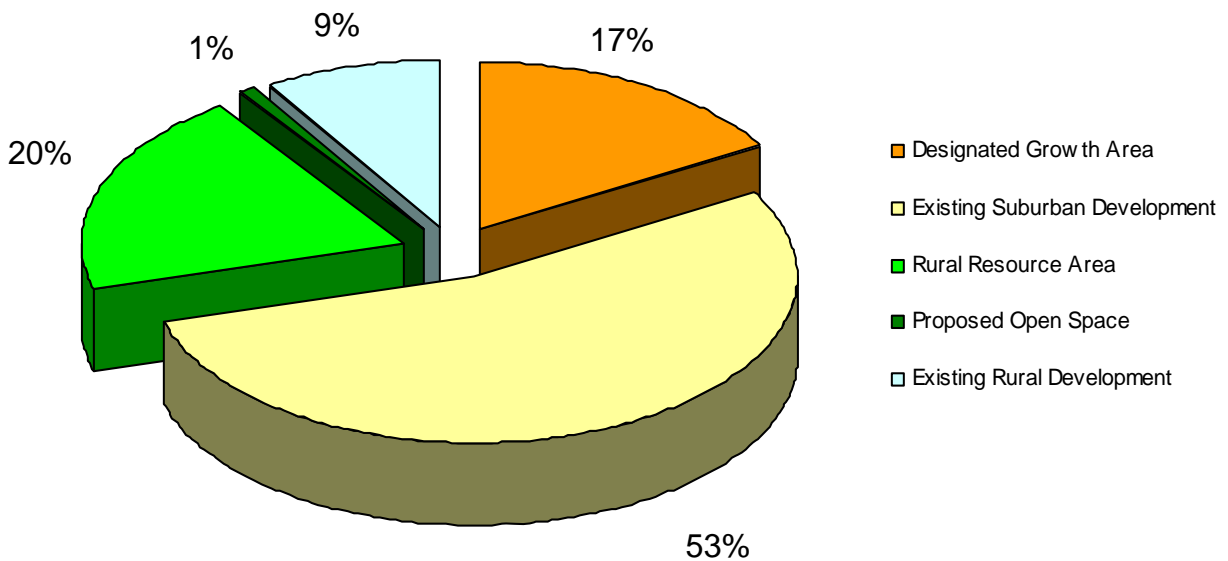
Acreage Proposed for Development on Previously Developed Sites

In 2000, the Planning Commission began tracking the amount of existing developed land with regard to proposed subdivisions and land developments. A record is kept of the approximate percentage of a site proposed for development that already has a structure, parking lot, or some other form of man-made feature. In 2010, the Planning Commission estimates that approximately 45% of the acres proposed for development had some such feature on it. This rate is consistent with the last few years and is indicative of a trend toward residential, commercial, and industrial infill development, rather than toward developing tracts of previously undisturbed open space.

County Growth and Preservation Plan

One of the main components of the County Comprehensive Plan, the *County Growth and Preservation Plan*, recommends higher density development in proximity to existing developed areas and low intensity development in rural areas. Subdivision and land development proposals were mapped and evaluated with regard to the *County Growth and Preservation Plan*. This analysis shows that 79% of the acres proposed for development were located in existing developed or designated growth areas, a figure equal to the average for the years 2005 through 2010.

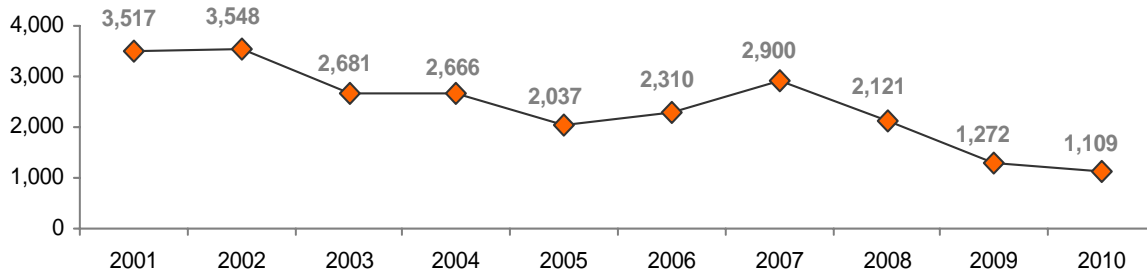
Growth and Preservation Plan, Proposed Acreage, 2010



Acres of Land Approved for Development

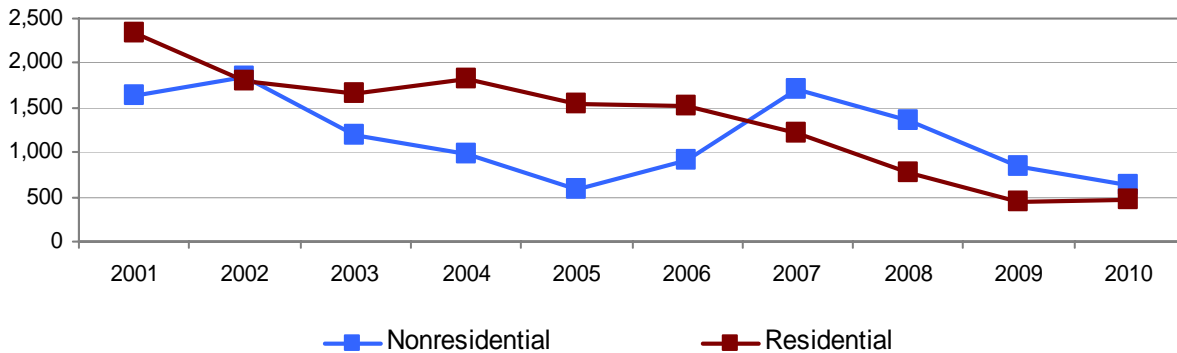
In this section, the total amount of land approved for development excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates or utilities. In 2010, 1,109 acres were approved for development. This was a 13% decrease from the 2009 total of 1,272 approved acres.

Approved Total Acreage, 2001-2010



The trend for the past four years has been for nonresidential proposals to consume more land than residential proposals. Before this period, it was residential uses that dominated the acreage comparison. In 2010, both types of uses were well below average. While the 642 proposed acres for nonresidential uses was below the ten year average of 1,168 acres, the residential total of 468 acres paled even further from its ten year average of 1,354 acres.

Acreage Approved for Development by Type, 2001 - 2010

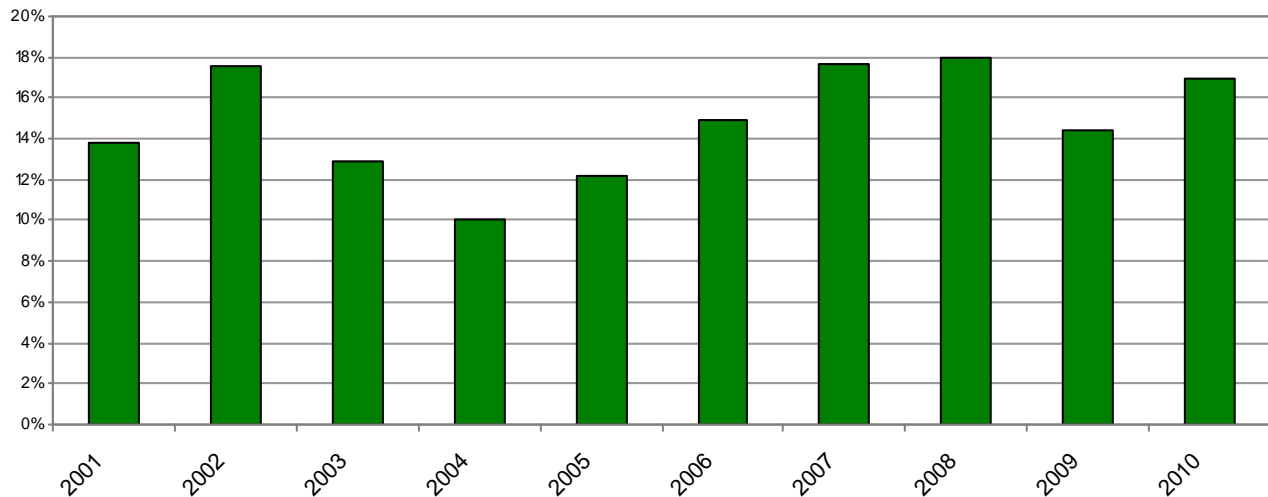


Acres of Land Approved as Private or Public Open Space

In 2010, 188 acres of open space were included in approved plans. This figure represents land that was set aside as privately or publicly owned land restricted from further development. It includes public and private parks, central green areas, commonly owned stormwater detention facilities, and natural areas including wetlands and floodplains. Acres that were approved as open space through subdivision and land development plans were dedicated to both public and private ownership. It should be noted that this analysis does not account for every acre preserved as open space in the county. Absent from this analysis are fee simple purchases of properties that do not involve subdivisions or land development, unlotted open space on condominium developments, and purchases of development rights through the Montgomery County Agricultural Preservation Program.

The total acreage set aside as open space in plans approved in 2010 was almost identical to the open space acreage in 2009 when 184 acres were set aside, but both totals were still lower than any previous annual figure charted since at least 1995. As a percentage of acres approved for development, the amount of open space was equal to 17% of total approved acreage. This was an increase in percentage compared to 2009, and it rates above the median percentage (15%) over the ten year span.

Open Space as a Percentage of Acres Approved for Development, 2001 to 2010



Conclusion

The amounts of acreage proposed or approved for development in 2010 decreased from 2009 totals. Proposals in terms of acreage have been declining every year since 2004 and are at their lowest point since records began in 1970. Approvals have only declined for three years and at a less dramatic rate, suggesting that older proposals may be taking longer to reach final approval thus providing some land development activity despite the lack of new recent proposals.

Section Three

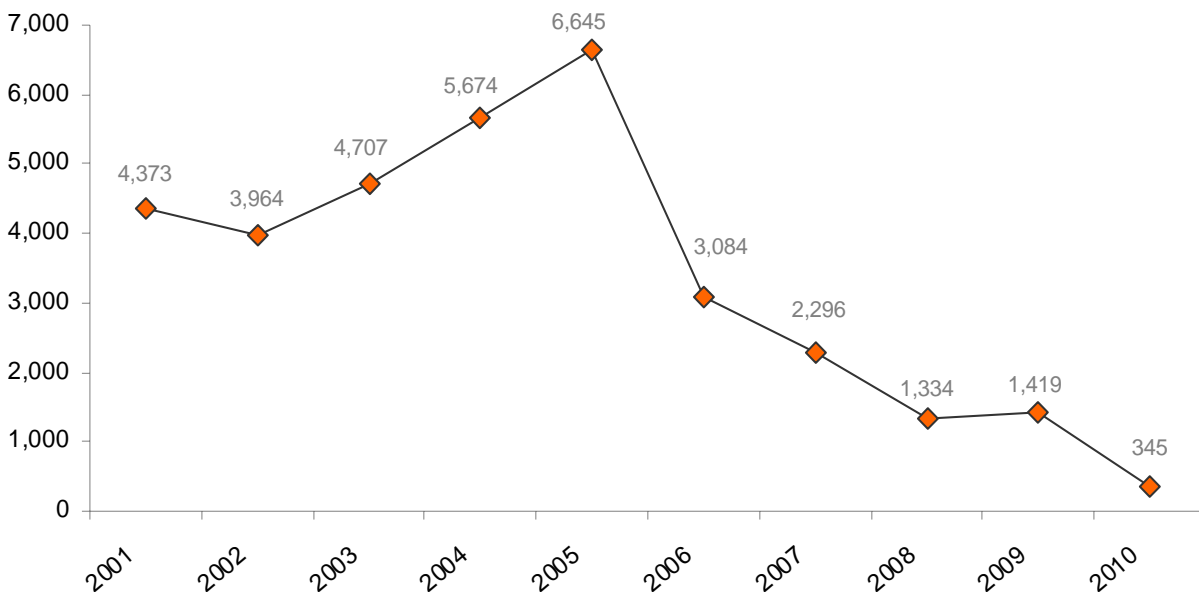
Residential Submissions

Proposed Residential Development

The total number of proposed residential units fell substantially in 2010. There were only 345 units proposed in 2010, a 76% decrease from 2009 (1,419 units). The annual decline in itself is enough to cause concern, but an overview of recent and historical residential trends dampens the outlook further. The median annual total for proposed residential units during the 1980's was 7,344 units. The median was 3,290 units during the 1990's and 4,169 units during the 2000's. The 2008 total of 1,334 units marked the lowest annual figure since records began in 1970. After a slight increase in 2009, the record has again been broken in 2010.

The first half of the decade showed very strong residential activity, peaking in 2005 with over 6,600 units proposed, but that activity has dropped over the second half of the decade due to a downturn in the economy, corrections in an exaggerated housing market, and problems with lending institutions that have resulted in tightening credit and an increase in foreclosures.

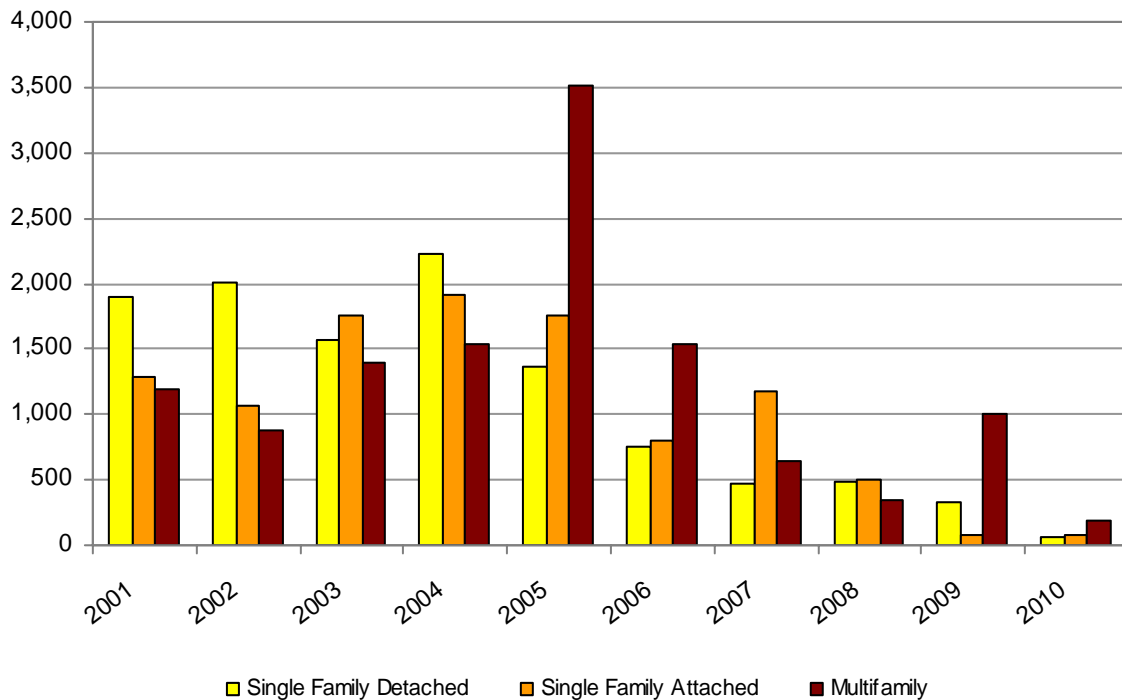
Proposed Residential Units, 2001 - 2010



Residential Proposals by Type

In 2010, multifamily housing types represented the greatest number of housing units proposed, continuing a shift over the second half of this decade toward fewer single family detached units. Multifamily and single family attached units comprised 80% of all proposed units in the county for 2010. Overall, each housing type was well below totals achieved earlier in the decade. 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. However, the 2010 totals are essentially at the bottom by any measure of development activity.

Proposed Residential Units by Type, 2001 - 2010



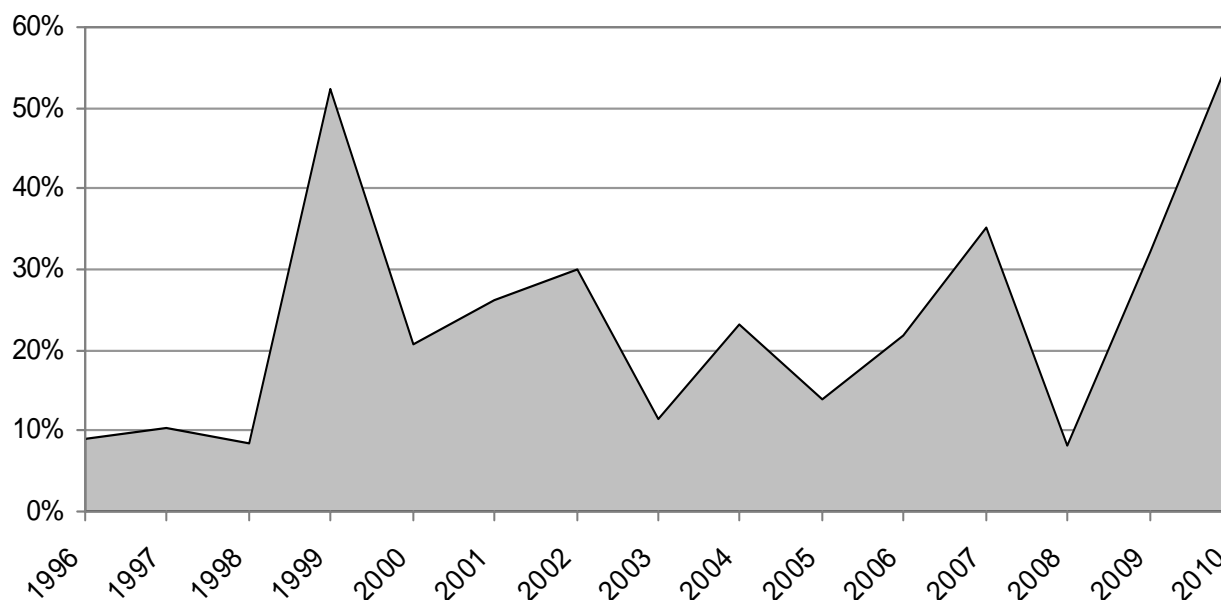
Proposed Development of Residential Housing Units, 2009 - 2010

Housing Type	2010	2009	Change
Single Family Detached	70	337	-79%
Single Family Attached	84	75	12%
Multifamily	191	1,007	-81%

Age-Restricted Housing Development

There were 196 age-restricted units proposed in 2010, and all but fourteen of them were multifamily units. This represents a lower total of age-restricted units proposed compared to 2009 (456 units), but considering the low number of total units proposed in 2010, age-restricted units actually accounted for more than half of all units. The last time this high of a ratio of age-restricted units to total units occurred was in 1999.

Proposed Age-Restricted Housing as a Percentage of Total Housing Units, 1996-2010

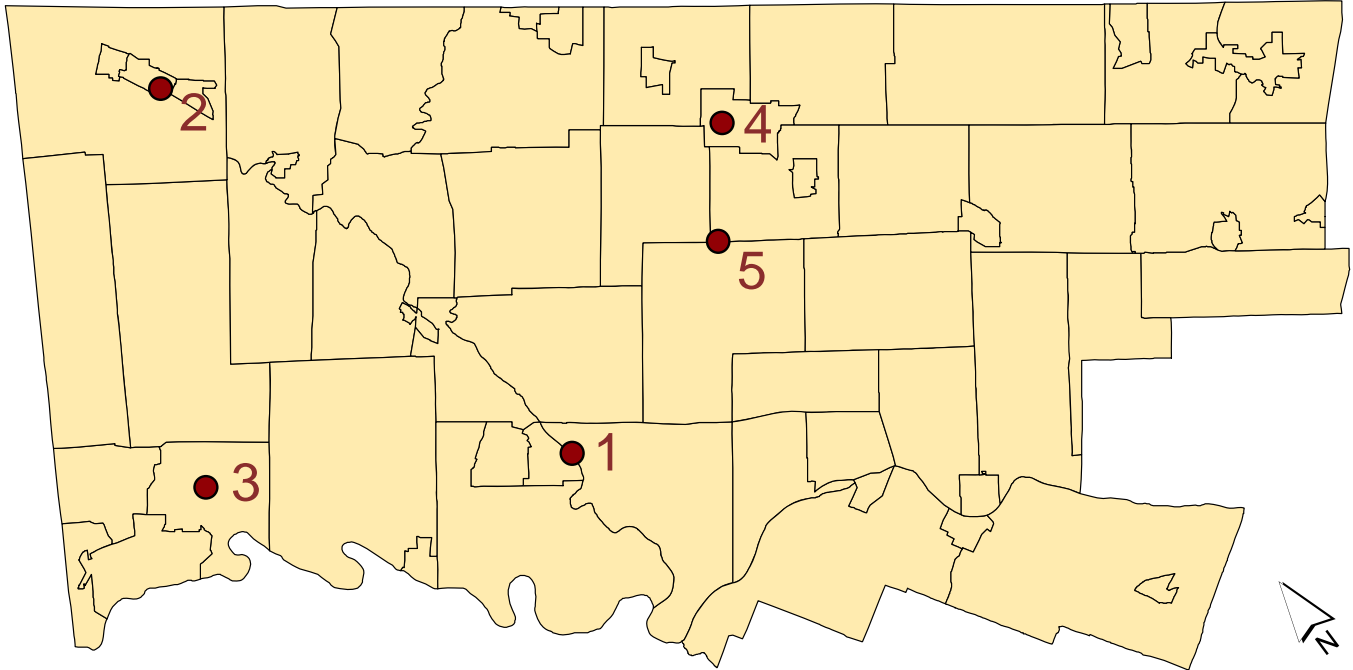


Largest Residential Proposals

The list of the largest residential proposals on the following page reflects why multifamily and age-restricted housing types had a strong presence in residential activity for 2010. The top three proposals were primarily multifamily developments and they were all age-restricted. There were no proposals for single-family detached residential developments with more than ten units.

The development with the largest number of units, 4000 Ridge Pike, is actually a continuing care community. In addition to the 101 independent living units, there is also a 92,000 square foot nursing facility proposed on its grounds. The second and third largest proposals contain a mix of housing types, but 85 percent of the units are multifamily.

Location of Top Five Largest Residential Proposals, 2010



Montgomery County Largest Residential Proposals, 2010

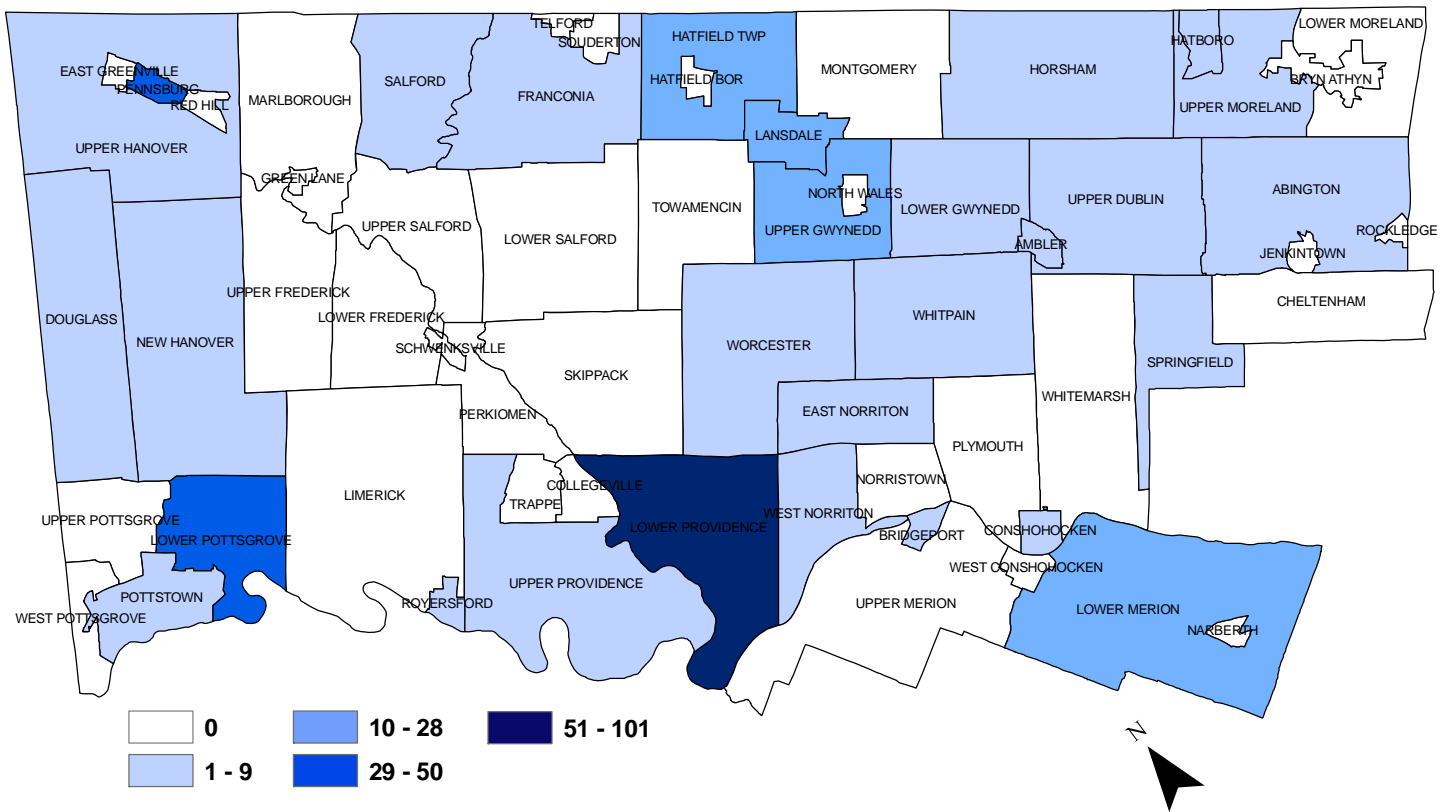
	Development Name	Units	Type	Municipality
1.	4000 Ridge Pike	101	MF (age-restricted)	Lower Providence
2.	Still Waters Community Center	50	MF/SFA/SFD (age-restricted)	Pennsburg
3.	Buchert Ridge Phase II	45	MF/SFA/SFD (age-restricted)	Lower Pottsgrove
4.	Cannon Square	28	SFA	Lansdale
5.	The Dion Tracts	22	SFA/SFD	Upper Gwynedd

Residential Units Proposed for Development by Municipality

The table on the following page lists proposed residential unit totals by type for each municipality. Lower Providence Township, Pennsburg Borough, and Lower Pottsgrove Township received the most residential activity, but only Lower Providence topped 100 units. The small number of overall units proposed resulted in very few communities standing out with residential activity in 2010.

Geographically, the countywide map below does not indicate any broad trends. The quantity of housing units proposed limits the observation of any clustering of activity. The most striking indication is how many municipalities had zero residential activity. Coupled with the next group, which had less than ten units proposed per municipality, there were 55 out of 62 municipalities with less than ten units proposed.

Proposed Housing Units by Municipality, 2010



Section Three: Residential Submissions

Montgomery County Proposed Residential Units by Municipality: 2010

Municipality	Total	Detached	Attached	Multifamily
Abington	1	1	0	0
Ambler	4	1	0	3
Bridgeport	4	0	4	0
Bryn Athyn	0	0	0	0
Cheltenham	0	0	0	0
Collegeville	0	0	0	0
Conshohocken	9	0	4	5
Douglass	9	9	0	0
East Greenville	0	0	0	0
East Norriton	2	2	0	0
Franconia	2	1	0	1
Green Lane	0	0	0	0
Hatboro	1	1	0	0
Hatfield Borough	0	0	0	0
Hatfield Township	12	10	2	0
Horsham	8	8	0	0
Jenkintown	0	0	0	0
Lansdale	28	0	28	0
Limerick	0	0	0	0
Lower Frederick	0	0	0	0
Lower Gwynedd	3	3	0	0
Lower Merion	17	0	17	0
Lower Moreland	0	0	0	0
Lower Pottsgrove	45	3	3	39
Lower Providence	101	0	0	101
Lower Salford	0	0	0	0
Marlborough	0	0	0	0
Montgomery	0	0	0	0
Narberth	0	0	0	0
New Hanover	4	4	0	0
Norristown	0	0	0	0

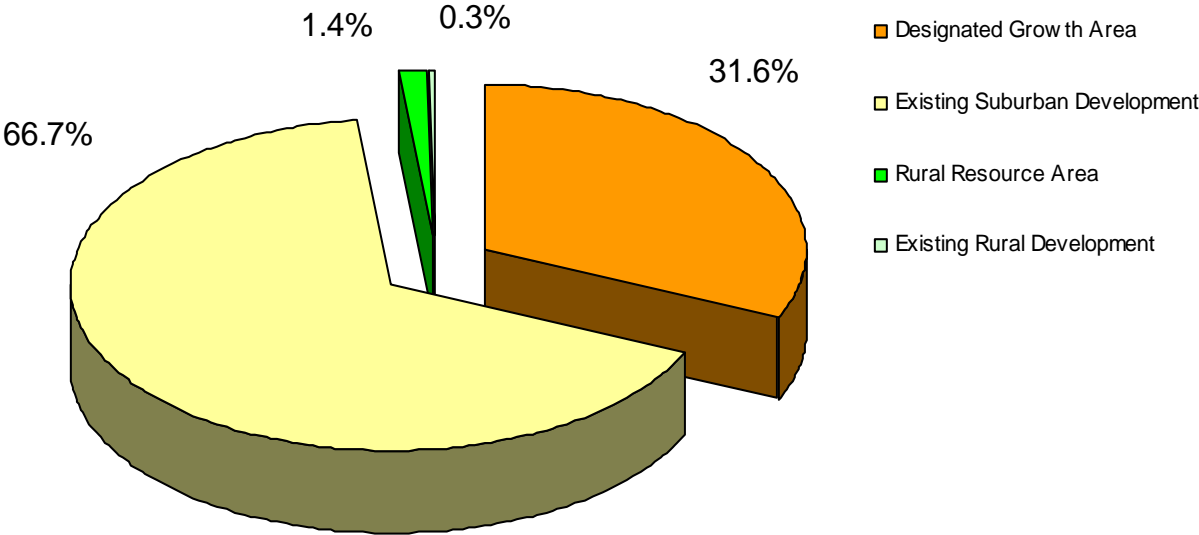
Municipality	Total	Detached	Attached	Multifamily
North Wales	0	0	0	0
Pennsburg	50	2	6	42
Perkiomen	0	0	0	0
Plymouth	0	0	0	0
Pottstown	1	1	0	0
Red Hill	0	0	0	0
Rockledge	0	0	0	0
Royersford	2	0	2	0
Salford	1	1	0	0
Schwenksville	0	0	0	0
Skippack	0	0	0	0
Souderton	0	0	0	0
Springfield	1	1	0	0
Telford	0	0	0	0
Towamencin	0	0	0	0
Trappe	0	0	0	0
Upper Dublin	1	1	0	0
Upper Frederick	0	0	0	0
Upper Gwynedd	23	7	16	0
Upper Hanover	3	3	0	0
Upper Merion	0	0	0	0
Upper Moreland	2	2	0	0
Upper Pottsgrove	0	0	0	0
Upper Providence	2	2	0	0
Upper Salford	0	0	0	0
West Conshohocken	0	0	0	0
West Norriton	2	0	2	0
West Pottsgrove	0	0	0	0
Whitemarsh	0	0	0	0
Whitpain	2	2	0	0
Worcester	5	5	0	0
Totals	345	70	84	191

Growth and Preservation Plan

All but five of the housing units proposed in the county were located in designated growth areas or existing developed areas (99%). The County Comprehensive Plan recommends that no more than 5% of new housing units should be located in rural resource areas. In 2010, only 1% of housing units proposed were located within rural resource areas. It would be hard to do any better than these measures, although the data should again be tempered by the overall lack of activity. Little pressure for new development reduces the likelihood of larger proposals in outlying areas or other greenfields. Much of the residential development proposed in 2010 was for very small subdivisions on infill sites in existing developed areas.

The County Comprehensive Plan also recommends that residential developments maintain a housing density of greater than one unit per acre in developed suburban areas and designated growth areas of the county. In 2010, over 93% of all units proposed in designated growth areas and developed suburban areas were proposed at densities greater than one housing unit per acre. The density of all new units proposed in designated growth areas was 2.3 units per acre and the density in developed suburban areas was 2.9 units per acre. The density in rural resource areas was 0.2 units per acre. Overall, the density of all newly proposed development in 2010 was 2.3 units per acre.

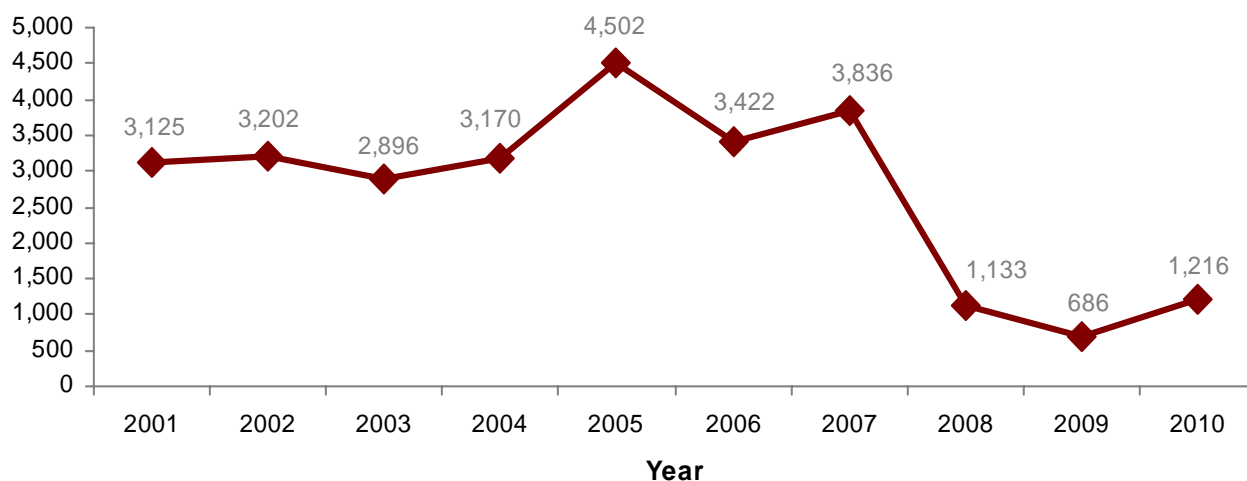
Growth and Preservation Plan, Proposed Residential Units, 2010



Approved Units

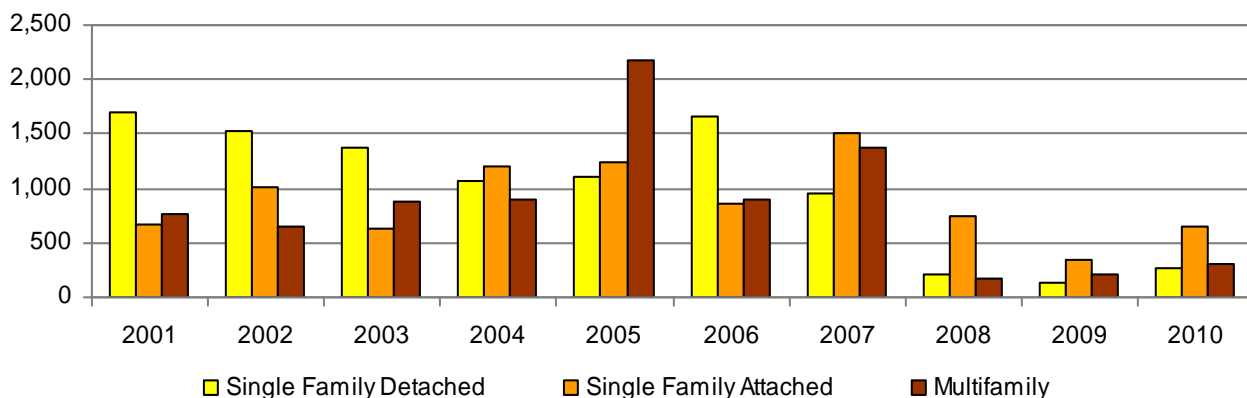
In 2010, there were a total of 1,216 residential units approved for construction. This is a 77% increase from the 2009 total. While these figures pale in comparison to annual approvals over the rest of the decade, the increase in 2010 is a sharp contrast from the trends outlined for residential proposals. This indicates that there are still proposals from the last several years active and in the pipeline for development. The Planning Commission did some general research into outstanding development proposals at the end of 2010 and discovered that there were still an estimated 5,000 units either approved or seeking approval that had a good chance of being developed over the next five years.

Approved Residential Housing Units, 2001 - 2010

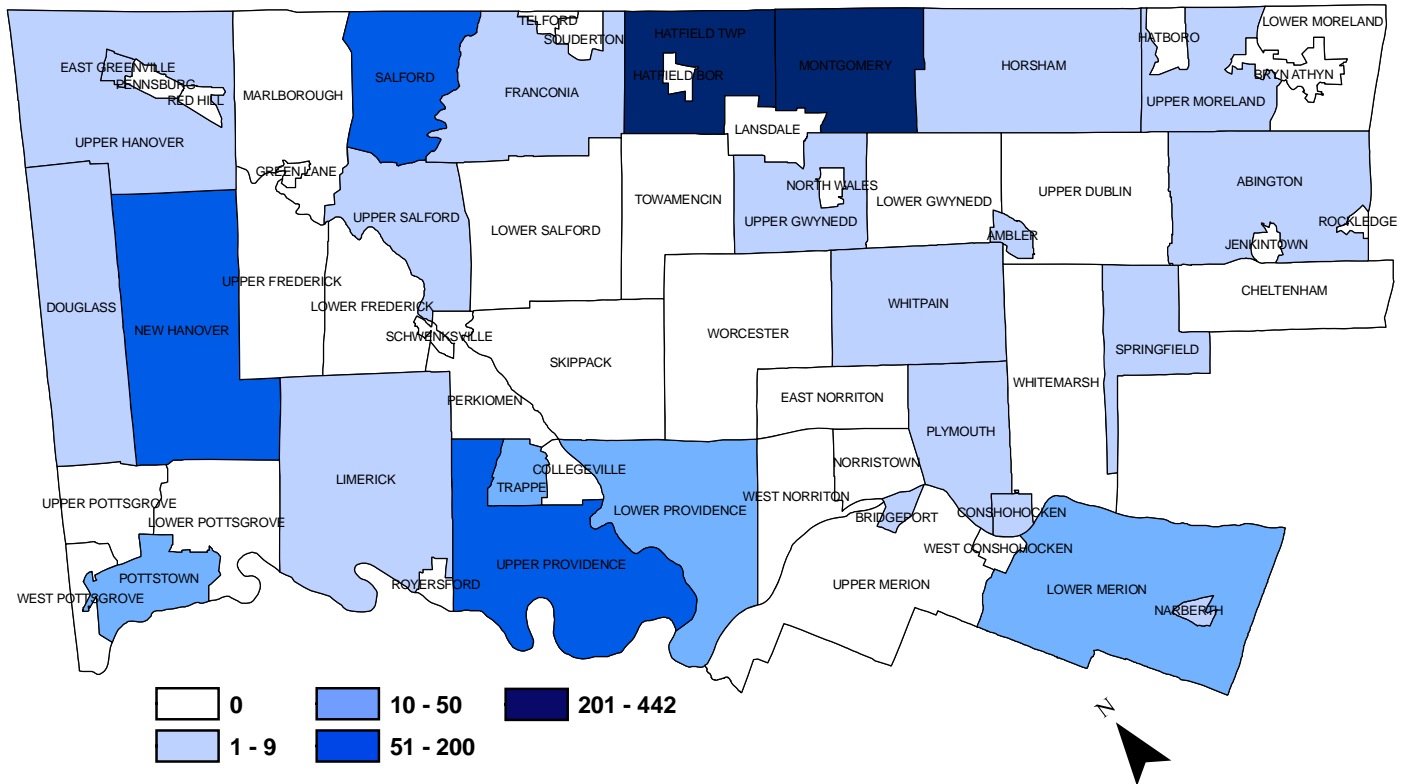


Single family attached units accounted for over half of all units approved in 2010. This was the fourth year in a row that attached units have been higher than detached or multifamily units. Detached units have fallen the most over the last three years compared with earlier levels in the decade. 628 of the approved units were age-restricted, accounting for 52% of all units.

Approved Residential Units by Type, 2001-2010



Residential Units Approved by Municipality, 2010



Conclusion

Residential land development proposals dropped even further in 2010. Only 345 new units were proposed. This is certainly the lowest annual total seen at the Planning Commission since at least 1970 when units began being recorded. The low total meant that all housing types were down in 2010, although single family detached units continued to decline and accounted for the fewest number of units compared to denser housing types. Age-restricted housing was still popular since over half of the proposed units were limited to residents aged 55 and over.

Despite the absence of new proposals, there was more life in the number of units that actually got municipal approval and were recorded in 2010. Over 1,200 units reached this stage, the highest total of the last three years, although still far below the rest of the decade. The current economy and housing market has extended the life of some older proposals and it may be taking longer for developers to go from plans to construction. However, the lack of new proposals will continue to impact actual construction if the housing market does not improve.

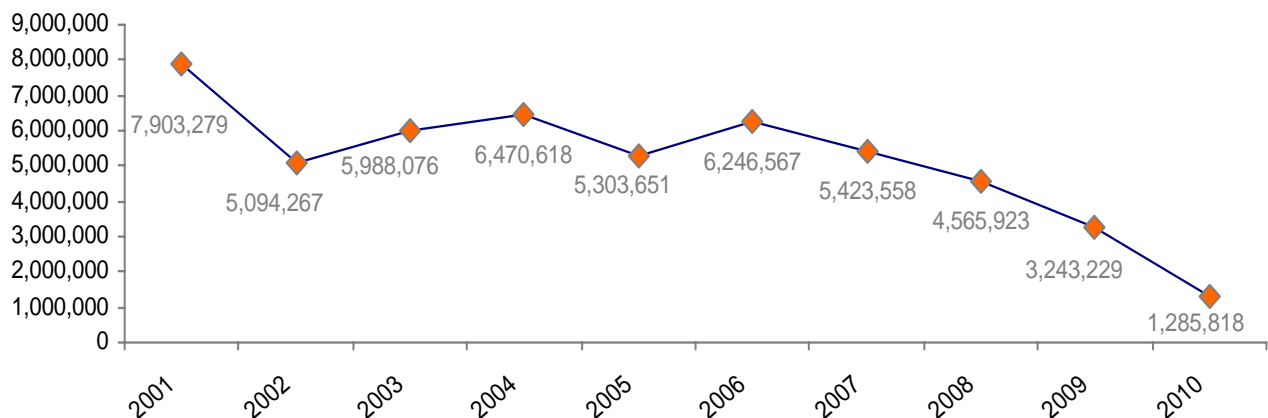
Section Four Nonresidential Submissions

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.

In 2010, the amount of nonresidential square feet proposed for development decreased by 60% compared to 2009. The total, 1.28 million square feet, is the lowest since records for nonresidential square footage began being compiled in 1988. Proposed nonresidential square footage has declined each of the last four years, dropping 79% since 2006.

Proposed Nonresidential Square Footage, 2001 to 2010



Nonresidential Proposals by Type

Commercial development proposals declined by 30% in 2010 to reach their lowest annual total since records for nonresidential square footage began being compiled in 1988. The average amount of commercial space proposed during the last decade was over 1.7 million square feet per year. The largest new commercial proposal in 2010 was a self storage facility in Upper Hanover Township, followed by two retail proposals in Upper Merion and Montgomery Townships.

Industrial square footage proposals were almost nonexistent in 2010, dropping 94% from 2009. A thirty thousand square foot building addition to the National Label Company in Whitmarsh Township and a freestanding industrial building in Upper Gwynedd Township were the only proposals with more than ten thousand square feet of construction proposed. A quarry development proposed in New Hanover Township would occupy over a hundred acres, but it will only entail 800 square feet of construction.

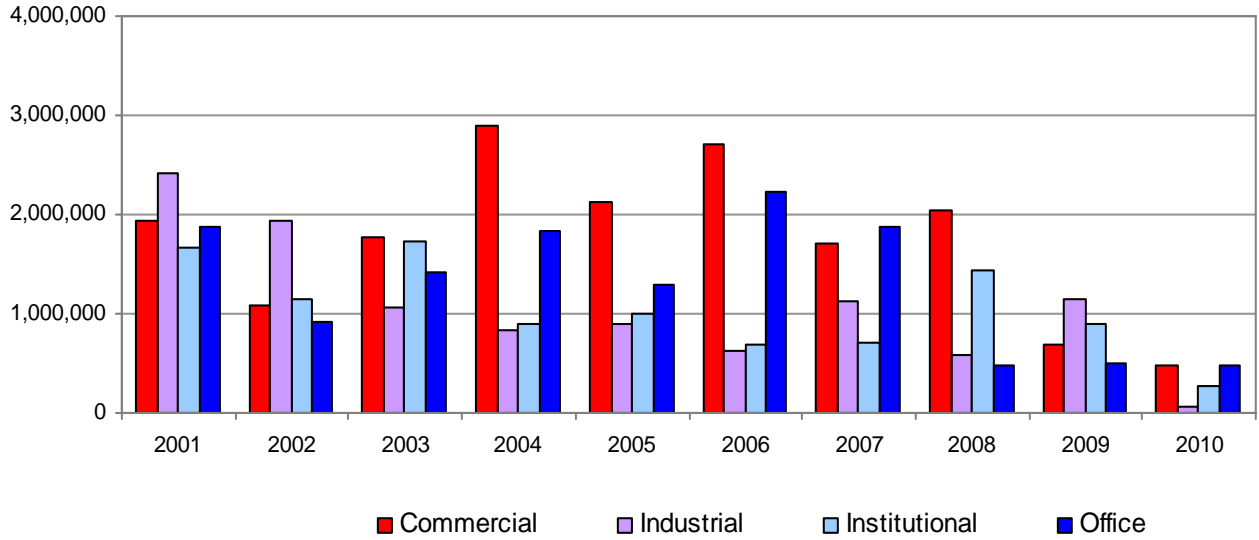
Proposed Development of Nonresidential Square Footage, 2009 - 2010

Type	2010	2009	Change
Commercial	483,394	687,963	-30%
Industrial	64,418	1,150,364	-94%
Institutional	266,196	902,674	-71%
Office	471,810	502,228	-6%
Total	1,285,818	3,243,229	-60%

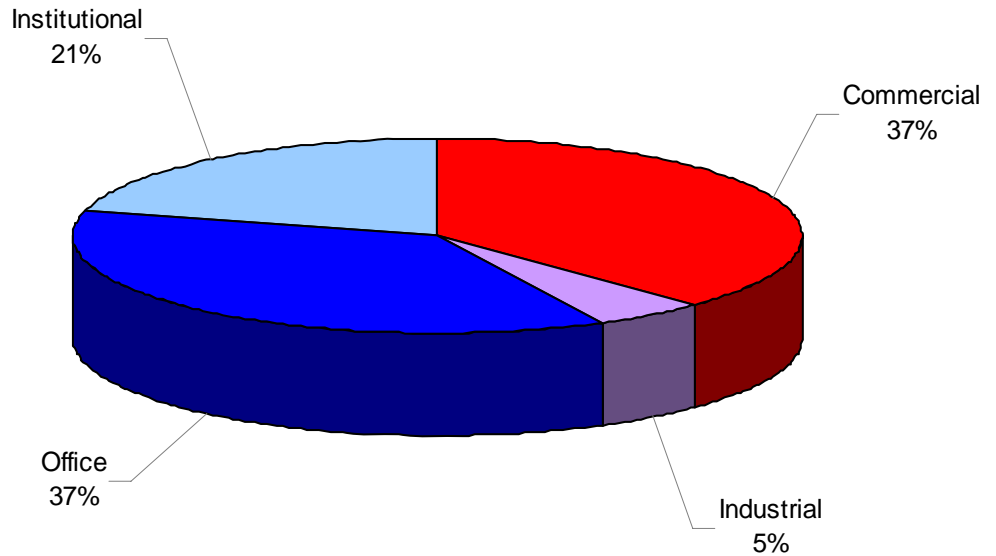
Institutional proposals dropped 71% from 2009. This category tends to swing more wildly than the others from year to year due to the impact of large school, church, or health care-related proposals that come and go. In 2010, there were no institutional proposals of over 100,000 square feet. The two largest proposals were assisted living and nursing facilities - the Mary J. Drexel Home in Lower Merion Township and a proposal at 4000 Ridge Pike in Lower Providence Township. The only school related proposal with more than 20,000 square feet of construction was for an addition onto Ringing Rocks Elementary School in Lower Pottsgrove Township.

Office proposals only dropped by six percent compared to 2009. The just under 500,000 square feet proposed is consistent with the totals for this category over the last three years; however office construction had been much higher during the first two-thirds of the decade. The biggest proposal is for a 240,000 square foot office development in the Horsham Ridge Industrial Center in Horsham Township. An 81,000 square foot office building is proposed as part of the Hawthorne Court development (also includes a hotel and day care facility on the site) in Montgomery Township.

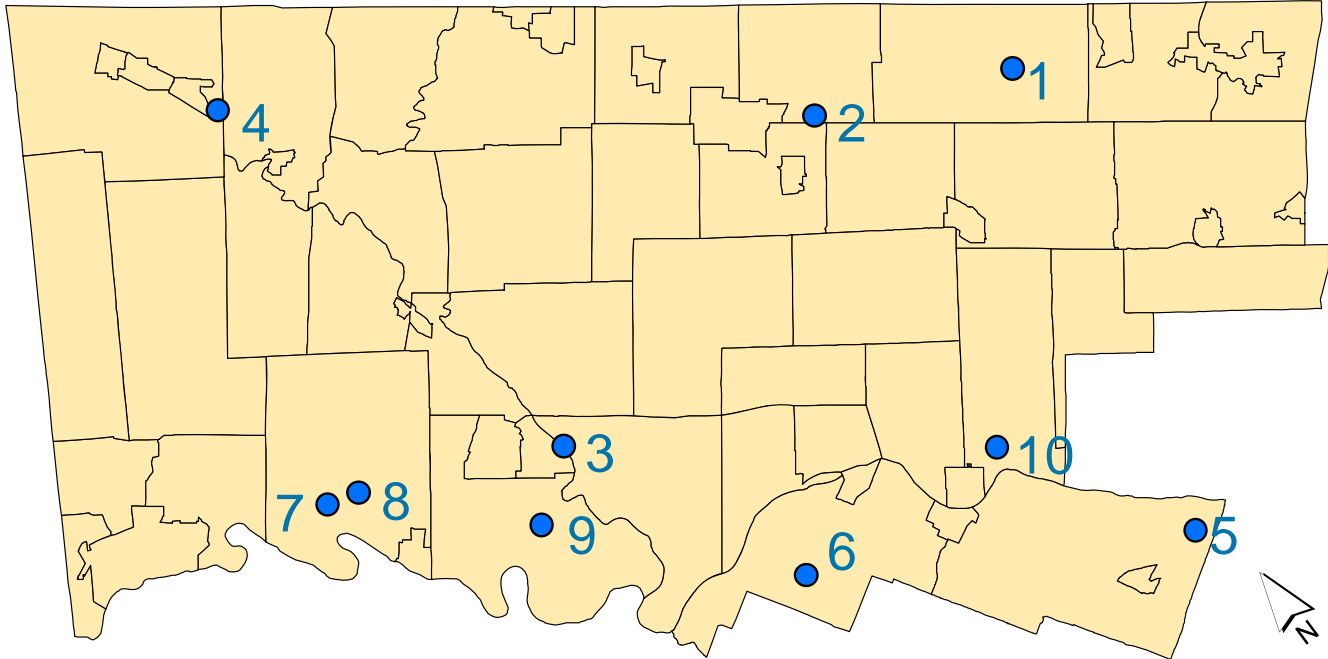
Proposed Nonresidential Square Feet by Development Type, 2001 - 2010



Proposed Nonresidential Square Footage, 2010



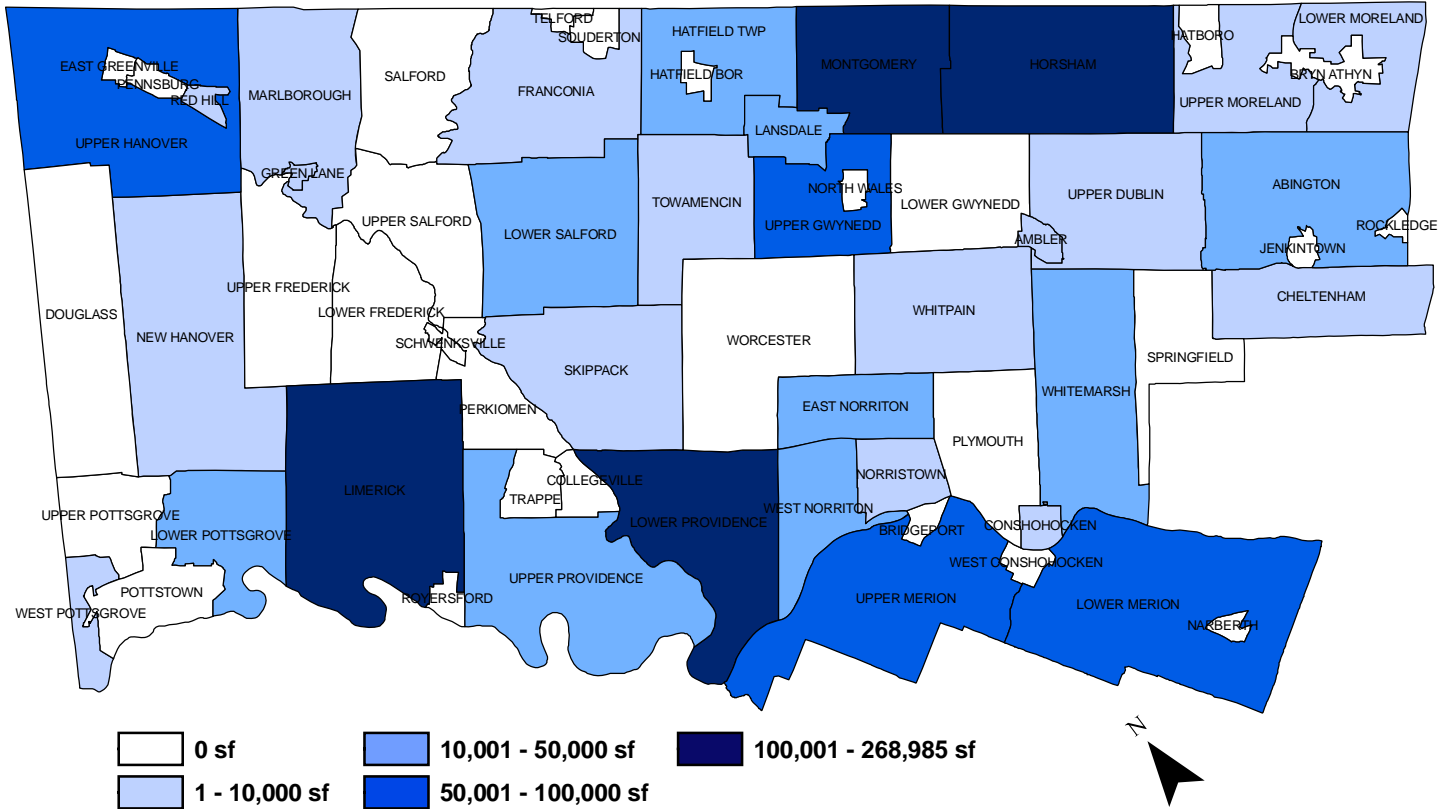
Location of Top Ten Largest Nonresidential Proposals, 2010



Montgomery County Largest Residential Proposals, 2010

	Development Name	Square Feet	Type	Municipality
1.	Horsham Ridge Industrial Center - Office Building	240,000	Office	Horsham
2.	Hawthorne Court	146,932	Office / Commercial / Institutional	Montgomery
3.	4000 Ridge Pike	92,960	Institutional	Lower Providence
4.	Self Storage Facilities - DeMeno Properties	76,630	Commercial	Upper Hanover
5.	Mary J. Drexel Home	72,000	Institutional	Lower Merion
6.	Plaza at King of Prussia	67,753	Commercial	Upper Merion
7.	Linfield Corporate Center - Lots 59 & 60	54,036	Office	Limerick
8.	430 Linfield-Trappe Road	53,700	Commercial	Limerick
9.	Providence Town Center - Movie Tavern	35,800	Commercial	Upper Providence
10.	National Label Co. Building Expansion	30,270	Industrial	Whitemarsh

Proposed Nonresidential Square Footage by Municipality, 2010



Nonresidential Square Footage Proposed for Development by Municipality

The table on the following page lists nonresidential square footage totals by type for each municipality. Horsham Township received the most square feet in proposals while Montgomery, Limerick, and Lower Providence Townships followed with over 100,000 square feet proposed in each municipality.

The countywide map above shows that nonresidential development proposals tended to cluster around the North Penn Region as well as communities in the Schuylkill River Valley - along the Rt. 422 Corridor as well as in Upper and Lower Merion Townships. As with residential proposals, the low amount of total development proposed reduces the impact of these observations.

Section Four: Nonresidential Submissions

Proposed Nonresidential Square Footage by Municipality, 2010

Municipality	Total	Commercial	Industrial	Institutional*	Office
Abington	21,826	11,326	0	0	10,500
Ambler	2,054	2,054	0	0	0
Bridgeport	0	0	0	0	0
Bryn Athyn	0	0	0	0	0
Cheltenham	1,295	0	0	1,295	0
Collegeville	0	0	0	0	0
Conshohocken	7,042	3,042		0	4,000
Douglass	0	0	0	0	0
East Greenville	0	0	0	0	0
East Norriton	17,725	3,394	0	12,513	1,818
Franconia	1,460	1,460	0	0	0
Green Lane	3,584	3,584	0	0	0
Halboro	0	0	0	0	0
Halfield Borough	0	0	0	0	0
Halfield Township	32,228	22,500	0	0	9,728
Horsham	268,985	24,900	4,085	0	240,000
Jenkintown	0	0	0	0	0
Lansdale	17,333	0	0	17,333	0
Limerick	136,200	77,940	0	4,224	54,036
Lower Frederick	0	0	0	0	0
Lower Gwynedd	0	0	0	0	0
Lower Merion	93,928	18,236	0	75,692	0
Lower Moreland	4,085	4,085	0	0	0
Lower Pottsgrove	36,221	4,500	0	20,407	11,314
Lower Providence	121,371	28,411	0	92,960	0
Lower Salford	27,631	0	0	0	27,631
Marlborough	3,965	2,177	1,788	0	0
Montgomery	146,932	54,932	0	11,000	81,000
Narberth	0	0	0	0	0
New Hanover	3,200	2,400	800	0	0
Norristown	1,470	0	0	1,470	0

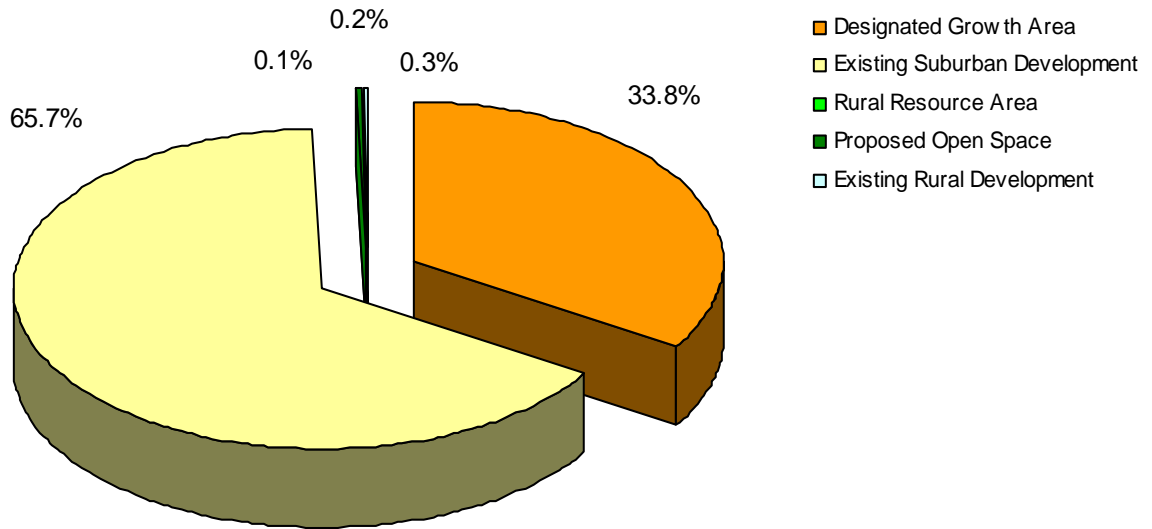
Municipality	Total	Commercial	Industrial	Institutional*	Office
North Wales	0	0	0	0	0
Pennsburg	0	0	0	0	0
Perkiomen	0	0	0	0	0
Plymouth	0	0	0	0	0
Pottstown	0	0	0	0	0
Red Hill	2,760	0	0	2,760	0
Rockledge	0	0	0	0	0
Royersford	0	0	0	0	0
Salford	0	0	0	0	0
Schwenksville	0	0	0	0	0
Skippack	6,161	0	3,000	0	3,161
Souderton	0	0	0	0	0
Springfield	0	0	0	0	0
Telford	0	0	0	0	0
Towamencin	8,389	0	0	8,389	0
Trappe	0	0	0	0	0
Upper Dublin	4,223	0	0	4,223	0
Upper Frederick	0	0	0	0	0
Upper Gwynedd	53,097	0	24,475	0	28,622
Upper Hanover	76,630	76,630	0	0	0
Upper Merion	76,251	76,251	0	0	0
Upper Moreland	1,000	1,000	0	0	0
Upper Pottsgrove	0	0	0	0	0
Upper Providence	43,722	43,722	0	0	0
Upper Salford	0	0	0	0	0
West Conshohocken	0	0	0	0	0
West Norriton	13,930	0	0	13,930	0
West Pottsgrove	1,450	1,450	0	0	0
Whitemarsh	43,170	12,900	30,270	0	0
Whitpain	6,500	6,500	0	0	0
Worcester	0	0	0	0	0
Totals	1,285,818	483,394	64,418	266,196	471,810

*Includes institutional and elderly institutional proposals.

Growth and Preservation Plan

The County Comprehensive Plan recommends that new nonresidential development be located mostly in existing developed areas and designated growth areas. In 2010, all but 3,000 square feet of proposed nonresidential development was located in these areas (99%). Two-thirds of nonresidential development proposals were located in existing suburban developed areas with another third found in designated growth areas. There was very little nonresidential square footage proposed in rural resource areas or proposed open space areas although a quarry was proposed in the rural resource area. The quarry includes only 800 square feet of development, but occupies over a hundred acres.

Growth and Preservation Plan, Proposed Nonresidential Square Footage, 2010

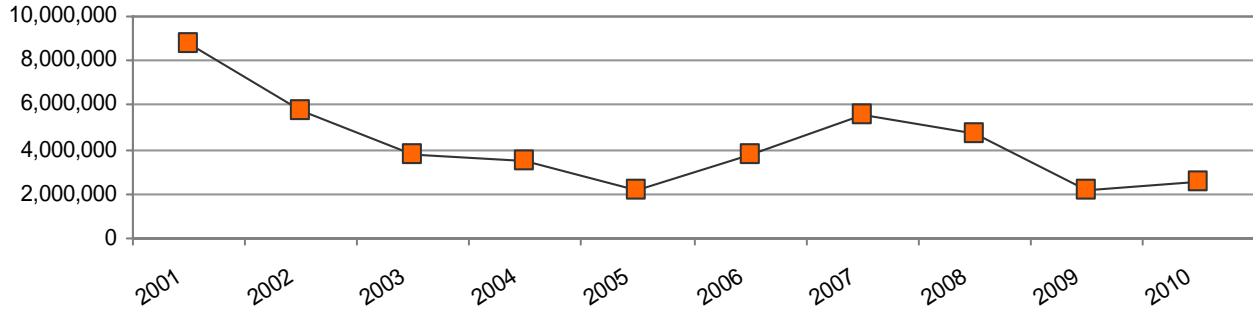


Approved Nonresidential Development

In 2010, over 2.5 million square feet of nonresidential development were approved and final plans recorded. This was a 19% increase from the 2009 total, but still the third lowest total of the last ten years. Annual proposals, especially for nonresidential categories, can vary widely year to year based on the impact of only a few major development submissions, but the increase in approvals over the previous year contrasts with the drop in proposals. While not as substantial as the difference in residential proposals versus approvals, this also is indicative of older plans going through the approval process.

The square footage approved for commercial and industrial development declined from 2009, but institutional and office development more than doubled from 2009. Approval of a new hospital in East Norriton and an expansion to Lankenau Hospital in Lower Merion fueled the institutional total, while the office category was helped by a new office building in Conshohocken and a pharmaceutical expansion in Upper Providence.

Total Nonresidential Square Feet Approved, 2001 - 2010

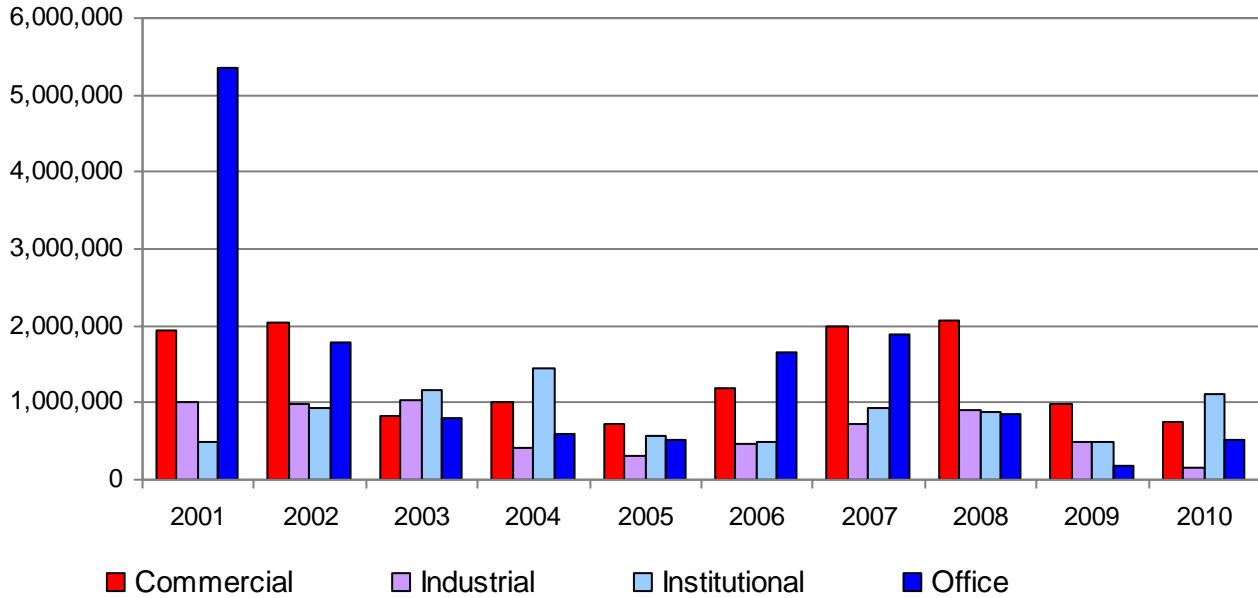


Year	Total Square Feet Approved
2001	8,797,128
2002	5,719,086
2003	3,806,059
2004	3,488,357
2005	2,122,773
2006	3,795,560
2007	5,570,145
2008	4,685,520
2009	2,159,522
2010	2,570,669
Total	42,714,819

Approved Development of Nonresidential Square Footage by Type, 2009 - 2010

Type	2010	2009	Change
Commercial	755,345	994,341	-24%
Industrial	166,304	491,775	-66%
Institutional	1,118,975	481,033	133%
Office	530,045	192,373	176%

Approved Nonresidential Square Footage by Type, 2001-2010



Conclusion

Proposed nonresidential square footage fell for the fourth year in a row dropping 60% to the lowest annual total since county records began in 1988. Commercial, industrial, and institutional land use categories all declined from the previous year. Office uses dropped slightly but have been relatively consistent over the last three years. Geographically, seven of the top ten largest proposals occurred along the Schuylkill River Valley, although the two largest proposals, mostly for office and a hotel were around the North Penn Region in Montgomery and Horsham Townships. Almost all nonresidential activity (99%) was located within designated growth areas or existing developed areas based on the County Comprehensive Plan.

Approved nonresidential development increased by 19% from 2009 to 2010. The increase was fueled by institutional and office development. Similarly to the residential segment, 2010 saw a dramatic decrease in proposed activity while approvals kept up with recent years and actually increased.

Section Five

Zoning Activity

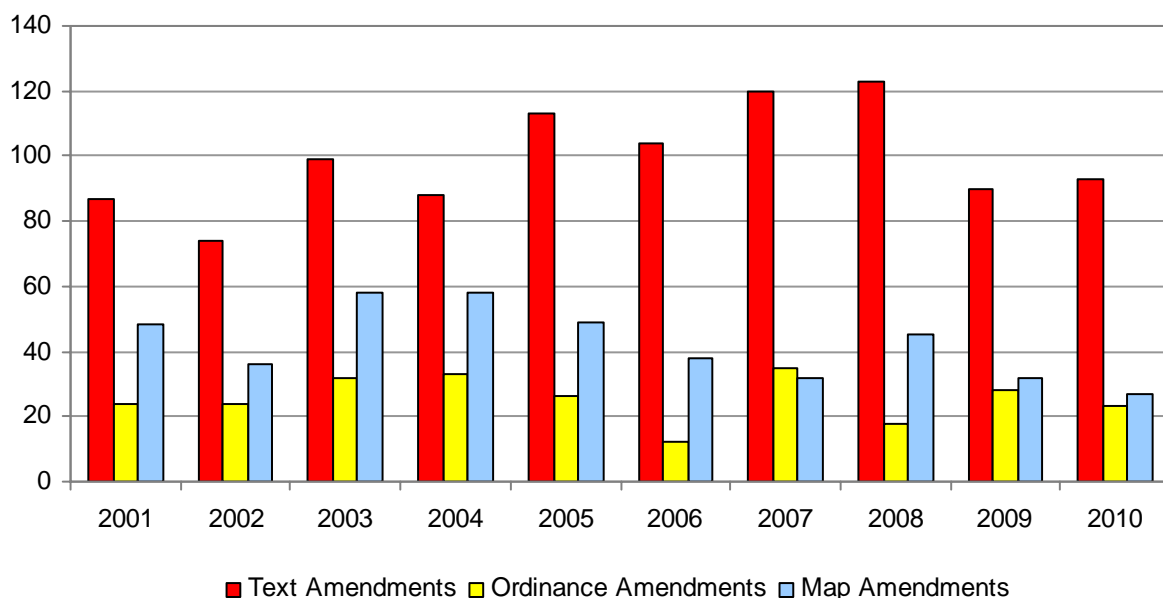
Zoning Amendments

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 143 proposed amendments to local zoning text, maps and subdivision ordinances. This was slightly less than the total from last year (150), and below the ten year average of 167.

In 2010, 23 zoning amendments were proposed to change significant portions of an entire ordinance, 93 involved less significant changes to a single district, and 27 involved map changes. Lower Merion Township had the most amendments of any municipality with 19.

Montgomery County Proposed Zoning Amendments: 2001 - 2010



Section Five: Zoning Activity

Zoning Activity by Municipality, 2010

Municipality	Total	Map Amend.	Ordinance Amend.	Minor Text Amend.
Abington	5	1	2	2
Ambler	3	0	0	3
Bridgeport	0	0	0	0
Bryn Athyn	0	0	0	0
Cheltenham	3	0	1	2
Collegeville	1	0	1	0
Conshohocken	2	1	1	0
Douglass	3	1	1	1
East Greenville	0	0	0	0
East Norriton	2	0	0	2
Franconia	1	0	0	1
Green Lane	0	0	0	0
Hatboro	0	0	0	0
Hatfield Borough	3	0	1	2
Hatfield Township	5	0	0	5
Horsham	7	3	1	3
Jenkintown	2	1	1	0
Lansdale	2	0	1	1
Limerick	6	1	2	3
Lower Frederick	1	0	0	1
Lower Gwynedd	4	2	0	2
Lower Merion	19	2	2	15
Lower Moreland	11	4	0	7
Lower Pottsgrove	1	0	1	0
Lower Providence	2	0	0	2
Lower Salford	4	0	1	3
Marlborough	3	0	0	3
Montgomery	3	0	0	3
Narberth	1	0	0	1
New Hanover	0	0	0	0
Norristown	4	0	0	4

Municipality	Total	Map Amend.	Ordinance Amend.	Minor Text Amend.
North Wales	0	0	0	0
Pennsburg	0	0	0	0
Perkiomen	3	1	0	2
Plymouth	3	2	0	1
Pottstown	0	0	0	0
Red Hill	1	0	0	1
Rockledge	1	0	0	1
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	3	1	0	2
Telford	0	0	0	0
Towamencin	0	0	0	0
Trappe	1	0	1	0
Upper Dublin	2	0	1	1
Upper Frederick	0	0	0	0
Upper Gwynedd	2	2	0	0
Upper Hanover	2	1	0	1
Upper Merion	1	0	0	1
Upper Moreland	3	0	1	2
Upper Pottsgrove	2	0	1	1
Upper Providence	2	0	0	2
Upper Salford	0	0	0	0
West Conshohocken	0	0	0	0
West Norriton	1	0	1	0
West Pottsgrove	1	0	0	1
Whitemarsh	4	1	0	3
Whitpain	5	2	0	3
Worcester	5	0	2	3
Total	143	27	23	93

