

2013 Annual Summary

Subdivision, Land Development and Zoning Activity



Montgomery County Planning Commission
Montgomery County, Pennsylvania

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2013 Annual Summary

Subdivision, Land Development, and Zoning Activity



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This report summarizes the subdivision, land development, and zoning proposals received by the Montgomery County Planning Commission in 2013. 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 also 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.

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.

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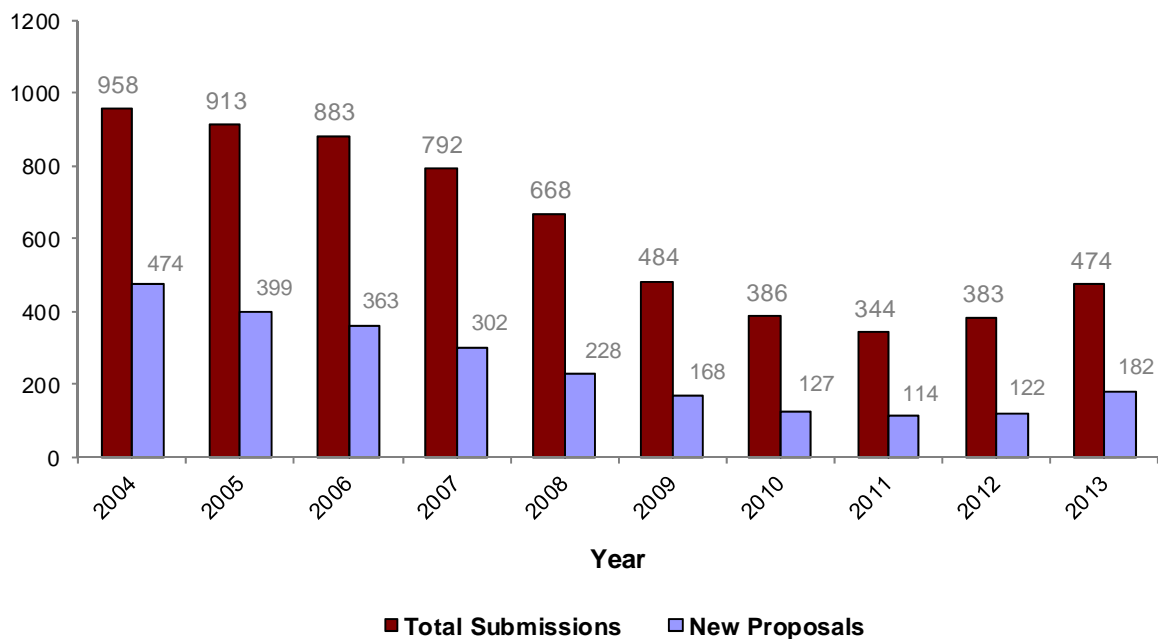
Section One

Number of Submissions

In 2013 the Planning Commission received 474 applications for subdivision, land development, and zoning ordinance and map amendments. This was 24% more than in 2012. While this is still well below levels seen prior to the recession, it marks the second consecutive annual increase and makes the strongest case yet for a market-rate recovery in land development activity.

The 2013 submissions included 182 new proposals for land developments or subdivisions that had not been previously submitted with similar land use and density components.

Total Annual Submissions, 2004 to 2013



Section One: Number of Submissions

Montgomery County Submissions by Municipality, 2013

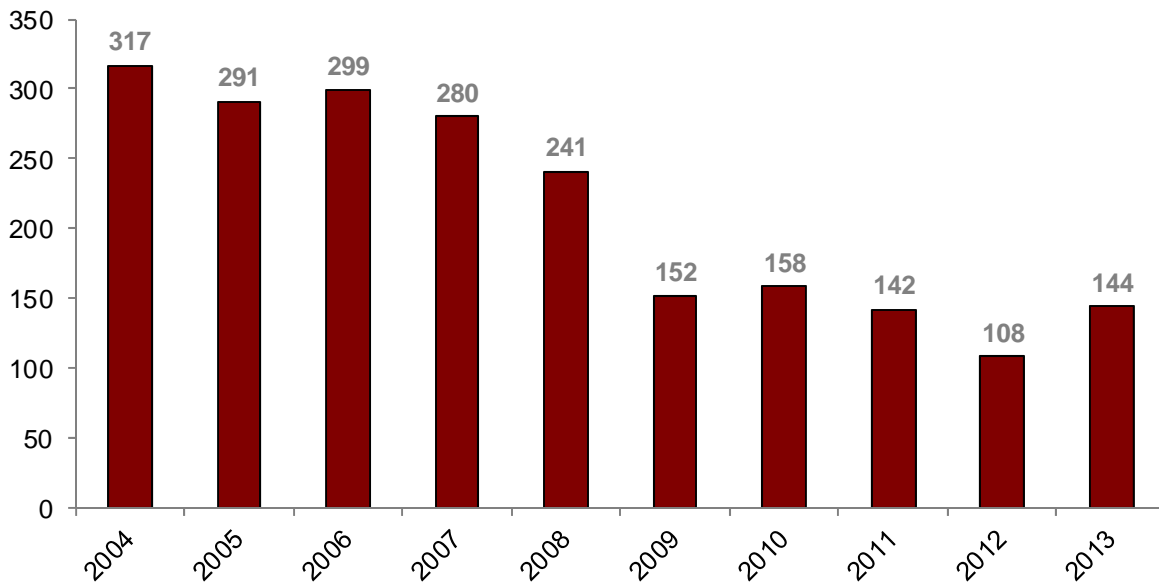
| Municipality | Total | Land Developments | Subdivisions | Municipality | Total | Land Developments | Subdivisions |
|-------------------|------------|-------------------|--------------|-------------------|-------|-------------------|--------------|
| Abington | 13 | 4 | 8 | North Wales | 2 | 1 | 1 |
| Ambler | 16 | 8 | 2 | Pennsburg | 1 | 1 | 0 |
| Bridgeport | 1 | 1 | 0 | Perkiomen | 2 | 0 | 0 |
| Bryn Athyn | 0 | 0 | 0 | Plymouth | 13 | 7 | 4 |
| Cheltenham | 5 | 3 | 0 | Pottstown | 12 | 8 | 3 |
| Collegeville | 6 | 3 | 2 | Red Hill | 3 | 1 | 0 |
| Conshohocken | 13 | 8 | 4 | Rockledge | 1 | 0 | 0 |
| Douglass | 9 | 4 | 4 | Royersford | 1 | 1 | 0 |
| East Greenville | 0 | 0 | 0 | Salford | 2 | 0 | 2 |
| East Norriton | 0 | 0 | 0 | Schwenksville | 2 | 0 | 0 |
| Franconia | 2 | 1 | 1 | Skippack | 9 | 3 | 7 |
| Green Lane | 0 | 0 | 0 | Souderton | 8 | 5 | 4 |
| Hatboro | 6 | 2 | 2 | Springfield | 3 | 2 | 0 |
| Hatfield Borough | 3 | 1 | 1 | Telford | 3 | 0 | 0 |
| Hatfield Township | 6 | 2 | 2 | Towamencin | 10 | 1 | 1 |
| Horsham | 11 | 1 | 3 | Trappe | 3 | 0 | 0 |
| Jenkintown | 0 | 0 | 0 | Upper Dublin | 29 | 8 | 7 |
| Lansdale | 7 | 4 | 1 | Upper Frederick | 9 | 1 | 2 |
| Limerick | 7 | 2 | 3 | Upper Gwynedd | 2 | 1 | 1 |
| Lower Frederick | 6 | 2 | 1 | Upper Hanover | 4 | 1 | 3 |
| Lower Gwynedd | 5 | 2 | 1 | Upper Merion | 9 | 7 | 1 |
| Lower Merion | 47 | 36 | 11 | Upper Moreland | 9 | 5 | 1 |
| Lower Moreland | 11 | 5 | 4 | Upper Pottsgrove | 3 | 0 | 3 |
| Lower Pottsgrove | 3 | 1 | 1 | Upper Providence | 37 | 12 | 9 |
| Lower Providence | 10 | 7 | 1 | Upper Salford | 0 | 0 | 0 |
| Lower Salford | 12 | 3 | 5 | West Conshohocken | 2 | 1 | 1 |
| Marlborough | 3 | 1 | 2 | West Norriton | 3 | 1 | 0 |
| Montgomery | 17 | 8 | 4 | West Pottsgrove | 0 | 0 | 0 |
| Narberth | 2 | 1 | 0 | Whitemarsh | 18 | 7 | 5 |
| New Hanover | 12 | 8 | 9 | Whitpain | 12 | 6 | 4 |
| Norristown | 9 | 5 | 4 | Worcester | 18 | 7 | 4 |
| Totals | 472 | 210 | 139 | | | | |

Note: Municipal totals include zoning-related submissions and special reviews. County total does not include two additional reviews for updates to the Douglass Township of Berks County Comprehensive Plan and the Delaware County Comprehensive Plan Land Use Element.

Approved Plans

In 2013, 144 plans were approved by their respective municipalities and recorded as a final plan. These plans were not necessarily submitted in 2013. 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, 2004 to 2013



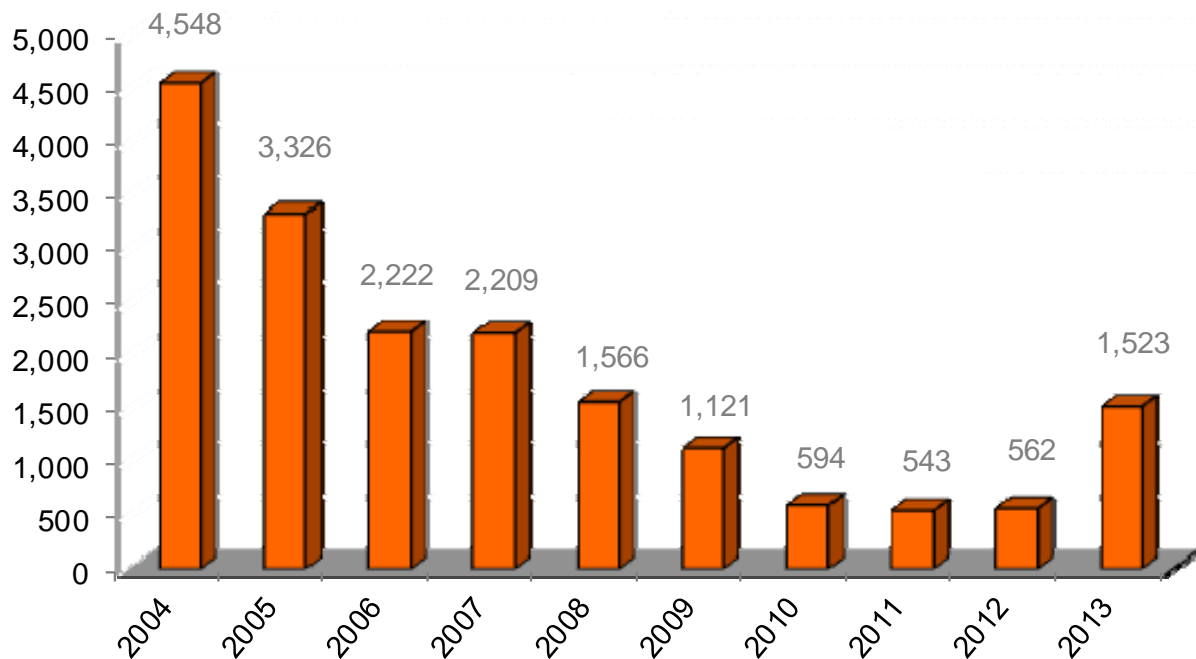
Section Two

Acres of Submissions

Countywide Acres Proposed for Development

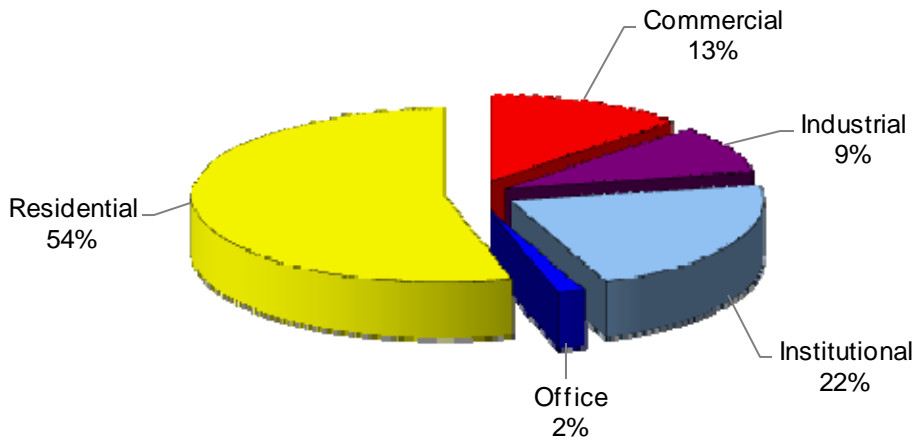
The total amount of land proposed for development in 2013, which excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates, transportation or utilities, was 1,523 acres. This represents almost three times the amount of acreage proposed in the previous year and the largest total in Montgomery County over the last five years. Not only did the county see more submissions activity in 2013, but much more land was proposed for development.

Acres Proposed for Development, 2004 to 2013



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 2013 with 54% of acreage proposed going toward residential uses. Institutional and Commercial uses were next with 22% and 13% of the total acreage proposed for development, respectively.

Acres Proposed for Development by Type, 2013



The amount of land proposed in 2013 for residential use (828 acres) was almost three times the 2012 total and was the largest acreage total seen since 2007. A rebound in residential activity is finally occurring after the housing bubble burst in the late 2000s, although proposed residential acreage used to account for several thousand acres per year. Regardless of changes in the market, 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 695 acres in 2013 and was outgained by residential acreage for the second 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 2013, Upper Providence led the county with 169 acres proposed for development, most of which was for residential projects. Other leading municipalities included Worcester, Lower Merion, Whitpain, and Douglass.

Section Two : Acreage of Submissions

Montgomery County Acres Proposed For Development by Municipality, 2013

| Municipality | Total | Nonresidential | Residential |
|-------------------|-------|----------------|-------------|
| Abington | 0 | 0 | 0 |
| Ambler | 6 | 1 | 5 |
| Bridgeport | 0 | 0 | 0 |
| Bryn Athyn | 0 | 0 | 0 |
| Cheltenham | 15 | 15 | 0 |
| Collegeville | 1 | 0 | 1 |
| Conshohocken | 19 | 4 | 15 |
| Douglass | 84 | 26 | 58 |
| East Greenville | 0 | 0 | 0 |
| East Norriton | 0 | 0 | 0 |
| Franconia | 13 | 10 | 3 |
| Green Lane | 0 | 0 | 0 |
| Hatboro | 3 | 0 | 3 |
| Hatfield Borough | 0 | 0 | 0 |
| Hatfield Township | 27 | 25 | 2 |
| Horsham | 20 | 13 | 7 |
| Jenkintown | 0 | 0 | 0 |
| Lansdale | 7 | 0 | 7 |
| Limerick | 16 | 16 | 0 |
| Lower Frederick | 10 | 0 | 10 |
| Lower Gwynedd | 9 | 2 | 7 |
| Lower Merion | 117 | 95 | 22 |
| Lower Moreland | 32 | 0 | 32 |
| Lower Pottsgrove | 62 | 62 | 0 |
| Lower Providence | 63 | 60 | 3 |
| Lower Salford | 53 | 3 | 51 |
| Marlborough | 2 | 0 | 2 |
| Montgomery | 21 | 18 | 3 |
| Narberth | 1 | 0 | 1 |
| New Hanover | 63 | 18 | 45 |
| Norristown | 5 | 1 | 4 |

| Municipality | Total | Nonresidential | Residential |
|-------------------|--------------|----------------|-------------|
| North Wales | 0 | 0 | 0 |
| Pennsburg | 5 | 5 | 0 |
| Perkiomen | 0 | 0 | 0 |
| Plymouth | 50 | 46 | 4 |
| Pottstown | 13 | 13 | 1 |
| Red Hill | 0 | 0 | 0 |
| Rockledge | 0 | 0 | 0 |
| Royersford | 0 | 0 | 0 |
| Salford | 0 | 0 | 0 |
| Schwenksville | 0 | 0 | 0 |
| Skippack | 66 | 5 | 61 |
| Souderton | 29 | 3 | 26 |
| Springfield | 7 | 0 | 7 |
| Telford | 0 | 0 | 0 |
| Towamencin | 13 | 0 | 13 |
| Trappe | 0 | 0 | 0 |
| Upper Dublin | 11 | 1 | 10 |
| Upper Frederick | 54 | 33 | 22 |
| Upper Gwynedd | 4 | 0 | 4 |
| Upper Hanover | 15 | 0 | 15 |
| Upper Merion | 47 | 46 | 0 |
| Upper Moreland | 19 | 19 | 0 |
| Upper Pottsgrove | 48 | 0 | 48 |
| Upper Providence | 169 | 29 | 140 |
| Upper Salford | 0 | 0 | 0 |
| West Conshohocken | 0 | 0 | 0 |
| West Norriton | 0 | 0 | 0 |
| West Pottsgrove | 0 | 0 | 0 |
| Whitemarsh | 77 | 16 | 61 |
| Whitpain | 87 | 45 | 41 |
| Worcester | 160 | 65 | 95 |
| Totals | 1,523 | 695 | 828 |

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.

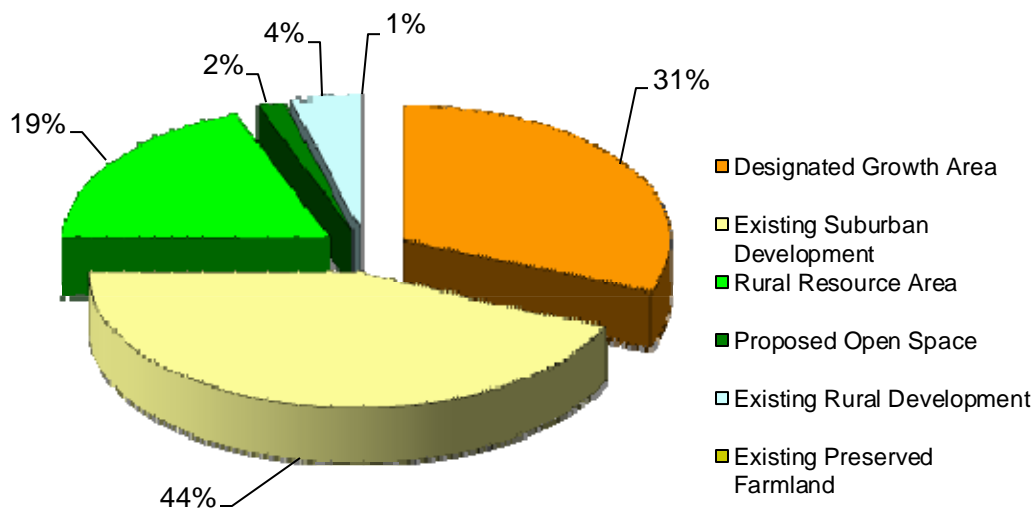
Acreage Proposed for Development on Previously Developed Sites

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 form of man-made feature. In 2013, the Planning Commission estimates that approximately 36% 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. However, this rate is below average compared to the last six years, which was about 43%.

County Growth and Preservation Plan

One of the main components of the County Comprehensive Plan, the *County Growth and Preservation Plan*, recommends most new development occur in existing developed areas or designated growth areas, with only very 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 slightly below the average of 81% for the years 2005 through 2012.

Location of 2013 Proposed Acreage Relative to the County Growth and Preservation Plan



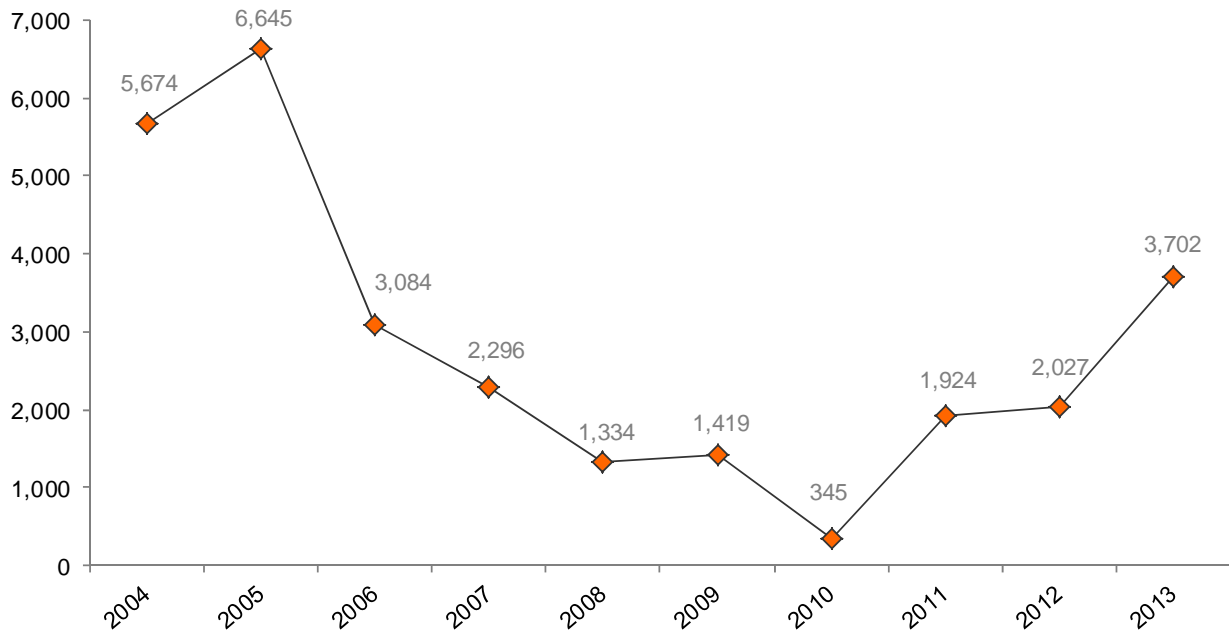
Section Three

Residential Submissions

Proposed Residential Development

There were 3,702 units proposed in 2013, a gain of 83% over the year before and the highest number of new proposed units since 2005. The housing market is slowly gaining steam from its historical lows, while the demand for apartments has boosted the attraction of infill and redevelopment projects in more urban communities. To put the numbers in context, the average number of proposed units was 3,683 during the 1990s and 3,845 during the 2000s.

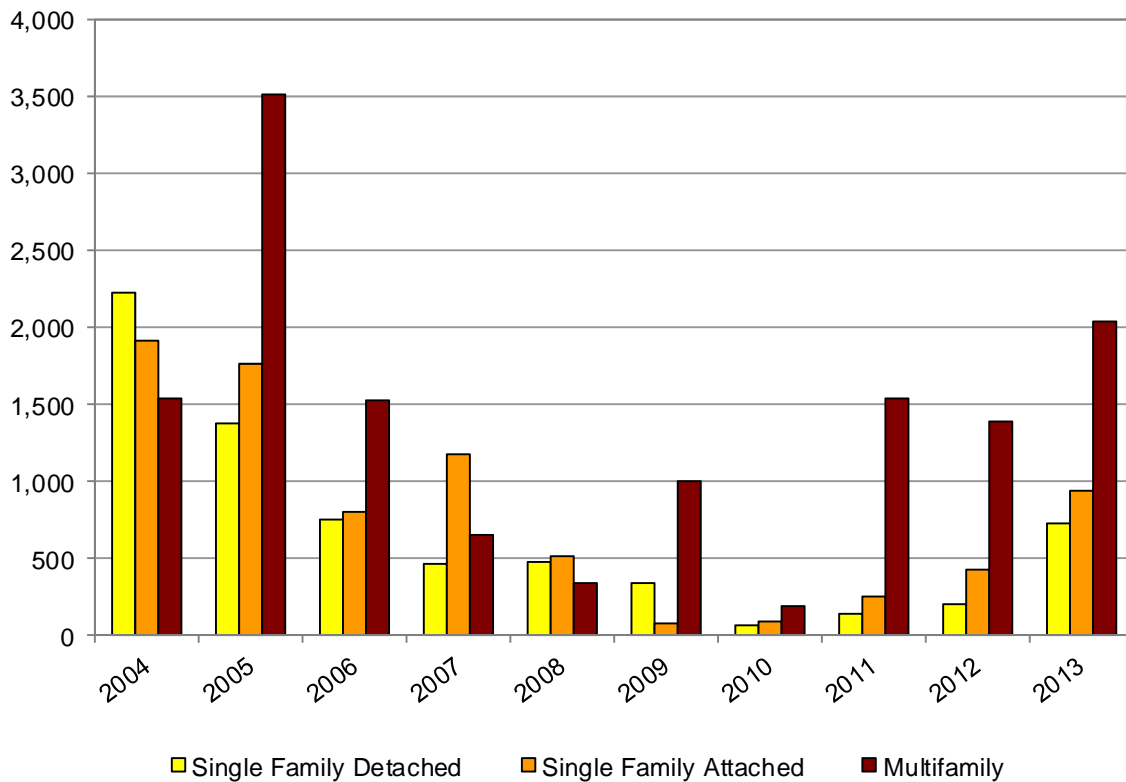
Proposed Residential Units, 2004 - 2013



Residential Proposals by Type

Over the past five years, the bulk of housing units proposed has come from multifamily housing types. This is part of a shift that began in 2005 toward fewer single family detached units and a greater emphasis on denser housing types. Multifamily and single family attached units comprised 80% of all proposed units in the county for 2013. However, interest in single-family detached homes is still alive and will result in more proposals as the housing market continues to recover. 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, 2004 - 2013



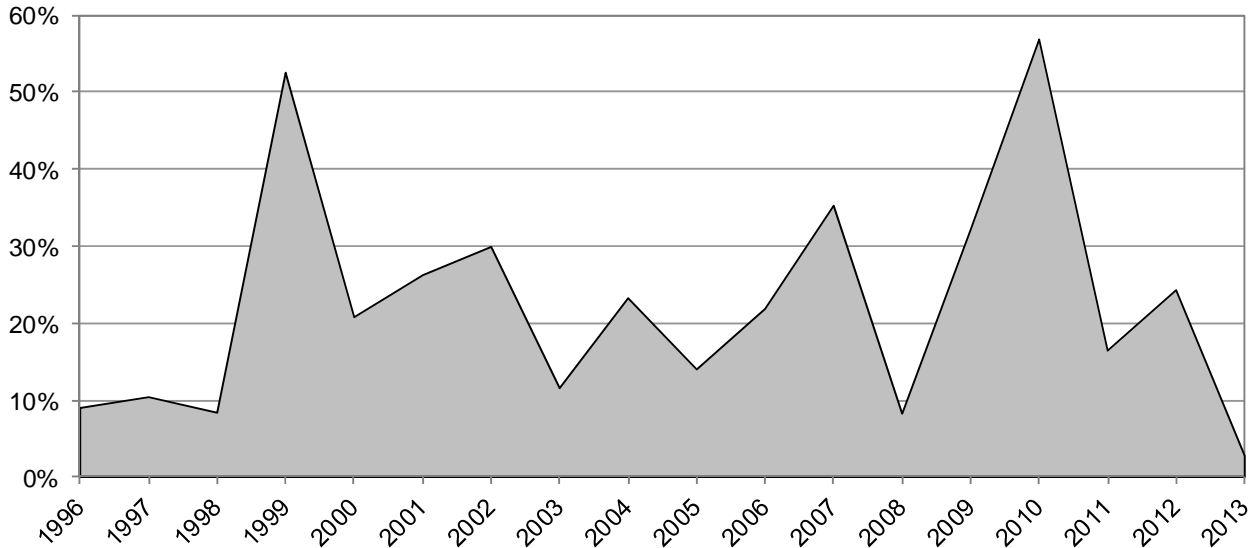
Proposed Development of Residential Housing Units, 2012 - 2013

| Housing Type | 2012 | 2013 | Change |
|------------------------|-------|-------|--------|
| Single Family Detached | 205 | 723 | 253% |
| Single Family Attached | 427 | 938 | 120% |
| Multifamily | 1,395 | 2,041 | 46% |

Age-Restricted Housing Development

There were only 104 age-restricted units proposed in 2013, all of them being single family detached units within the Meadow Glen development in Skippack Township. This represents a lower total of age-restricted units proposed compared to recent years and also a lower percentage (3%) of total units proposed. Since 1996, the average annual percentage has been about 22%. Age-restricted development proposals have fluctuated from year to year, but some 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, 1996-2013



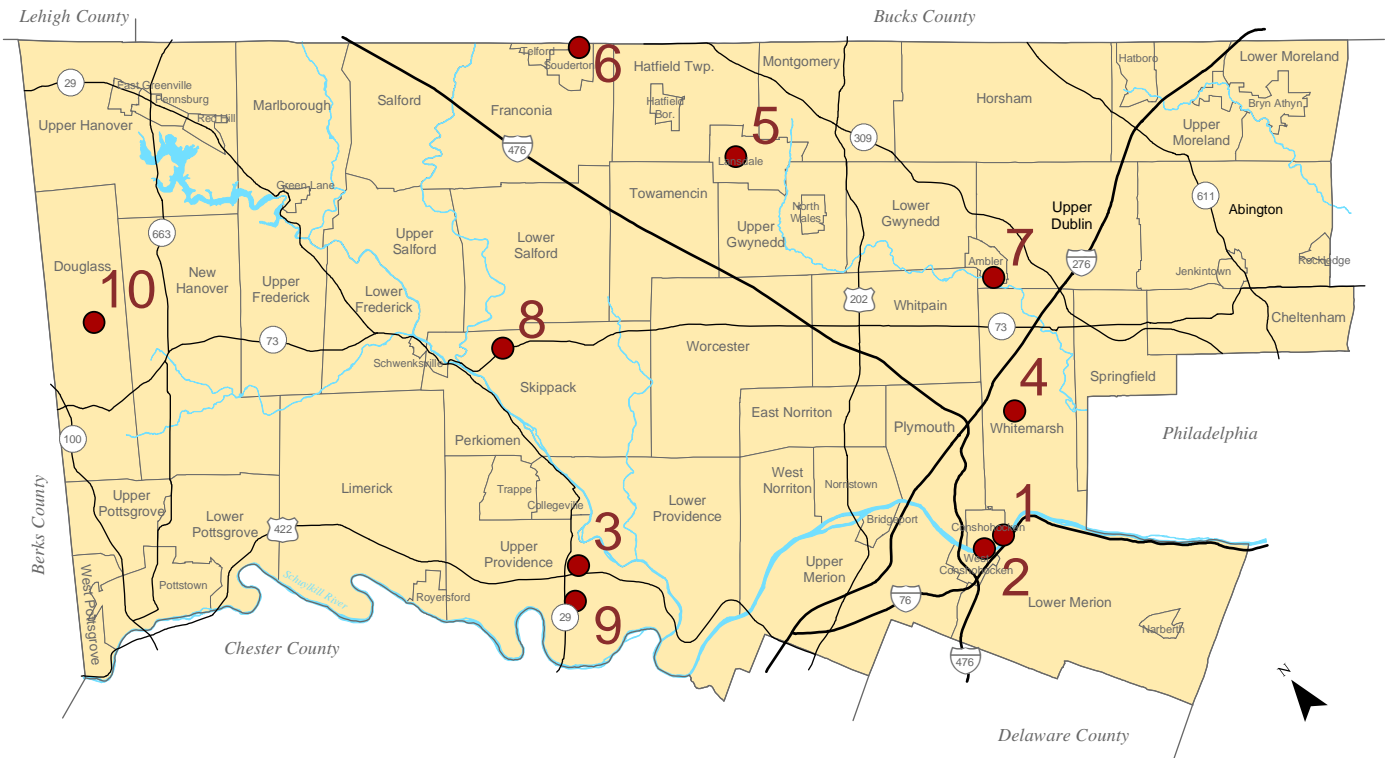
Largest Residential Proposals

The list of the largest residential proposals on the following page reflects why multifamily housing types had a strong presence in residential activity for 2013. Six of the top seven proposals were multifamily apartment developments. A strong market exists for rental apartments in the Philadelphia region over owner-occupied condominiums.

The two largest proposals were for high-density apartment units in Conshohocken Borough near employment centers, highway access, and regional rail service. Both proposals are along Conshohocken’s riverfront which has undergone a dramatic transformation over the last twenty years with office and apartment construction. The proposal at 401 and 433 Washington Street featured 619 units in four buildings adjacent to the Riverwalk Apartments at Millennium. The second proposal at 51 Washington Street featured 319 apartments and would replace an existing warehouse, one of the last industrial uses remaining on Conshohocken’s waterfront.

Section Three: Residential Submissions

Location of Top Ten Largest Residential Proposals, 2013



Montgomery County Largest Residential Proposals, 2013

| | Development Name | Units | Type | Municipality |
|-----|--|--------------|----------------------|---------------------|
| 1. | 401 & 433 Washington Street Apartments | 619 | MF | Conshohocken* |
| 2. | 51 Washington Street | 319 | MF | Conshohocken |
| 3. | Madison at Providence | 304 | MF | Upper Providence |
| 4. | Creekside Commons | 247 | SFA | Whitemarsh |
| 5. | Madison Lot Project | 247 | MF | Lansdale |
| 6. | Berkeley Court Phase 2 | 236 | MF | Souderton |
| 7. | Ambler Crossings | 115 | MF | Ambler |
| 8. | Meadow Glen Phase 3 | 104 | SFD (age-restricted) | Skipack |
| 9. | Troutman Property | 97 | SFD, SFA | Upper Providence |
| 10. | Hallowell Tract Residential Cluster | 92 | SFD | Douglass |

* The municipal boundary between Conshohocken and Whitemarsh crosses through the proposed development. Approximately 76 of the units would be in Whitemarsh Township.

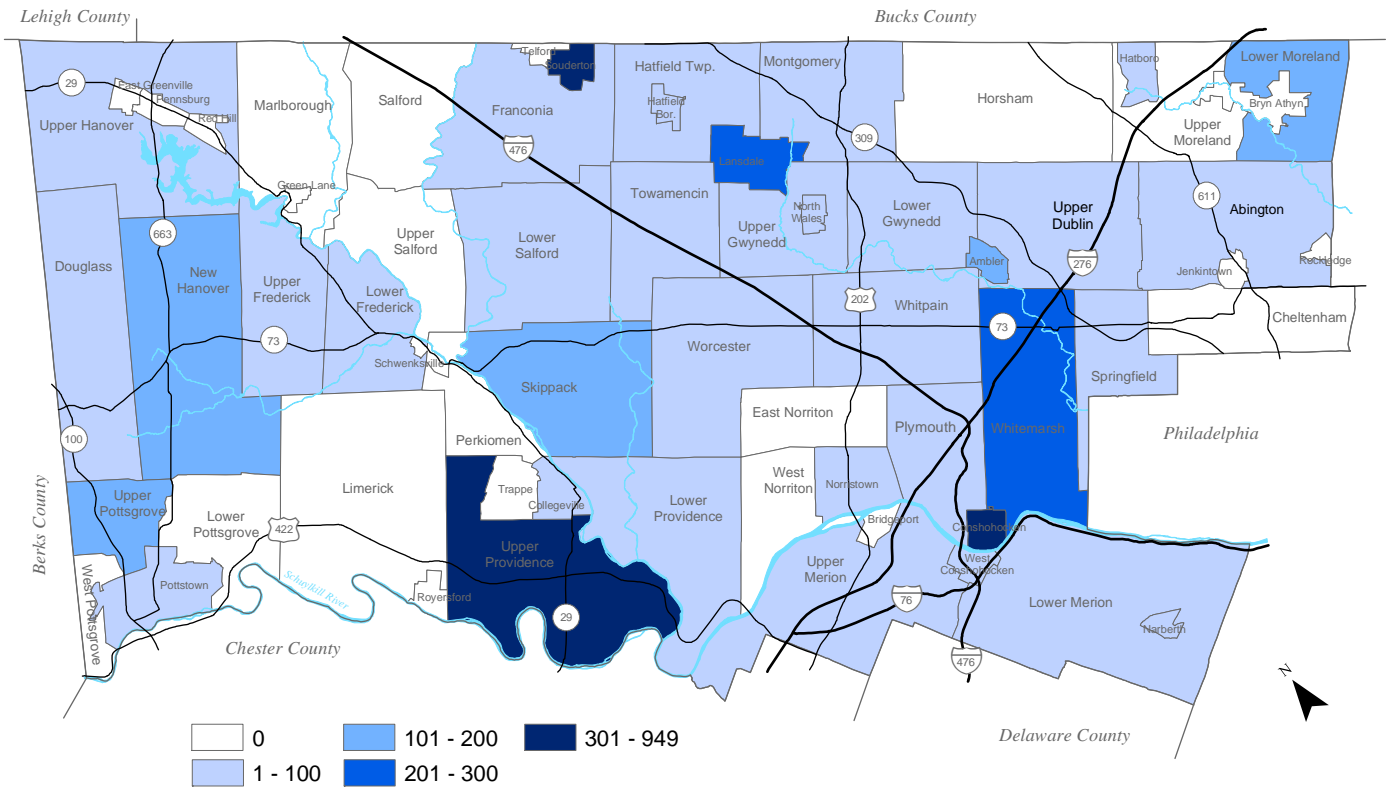
Residential Units Proposed for Development by Municipality

The table on the following page lists proposed residential unit totals by type for each municipality. Conshohocken, Upper Providence, Souderton, Whitmarsh, and Lansdale received the most residential activity and were the only municipalities to go over 200 units proposed.

Geographically, the countywide map below continues the recent 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.

Fewer municipalities are receiving zero proposals than in recent years, although there were still 24 of the county’s 62 municipalities that did not receive a residential proposal in 2013.

Proposed Housing Units by Municipality, 2013



Section Three: Residential Submissions

Montgomery County Proposed Residential Units by Municipality, 2013

| Municipality | Total | Detached | Attached | Multifamily |
|-------------------|-------|----------|----------|-------------|
| Abington | 2 | 2 | 0 | 0 |
| Ambler | 120 | 1 | 4 | 115 |
| Bridgeport | 0 | 0 | 0 | 0 |
| Bryn Athyn | 0 | 0 | 0 | 0 |
| Cheltenham | 0 | 0 | 0 | 0 |
| Collegeville | 3 | 1 | 2 | 0 |
| Conshohocken | 949 | 1 | 10 | 938 |
| Douglass | 95 | 95 | 0 | 0 |
| East Greenville | 0 | 0 | 0 | 0 |
| East Norriton | 0 | 0 | 0 | 0 |
| Franconia | 2 | 2 | 0 | 0 |
| Green Lane | 0 | 0 | 0 | 0 |
| Hatboro | 89 | 0 | 2 | 87 |
| Hatfield Borough | 2 | 0 | 2 | 0 |
| Hatfield Township | 1 | 1 | 0 | 0 |
| Horsham | 0 | 0 | 0 | 0 |
| Jenkintown | 0 | 0 | 0 | 0 |
| Lansdale | 247 | 0 | 0 | 247 |
| Limerick | 0 | 0 | 0 | 0 |
| Lower Frederick | 2 | 2 | 0 | 0 |
| Lower Gwynedd | 3 | 3 | 0 | 0 |
| Lower Merion | 63 | 12 | 12 | 39 |
| Lower Moreland | 138 | 58 | 80 | 0 |
| Lower Pottsgrove | 0 | 0 | 0 | 0 |
| Lower Providence | 2 | 2 | 0 | 0 |
| Lower Salford | 54 | 54 | 0 | 0 |
| Marlborough | 0 | 0 | 0 | 0 |
| Montgomery | 5 | 5 | 0 | 0 |
| Narberth | 12 | 0 | 3 | 9 |
| New Hanover | 132 | 132 | 0 | 0 |
| Norristown | 60 | 0 | 24 | 36 |

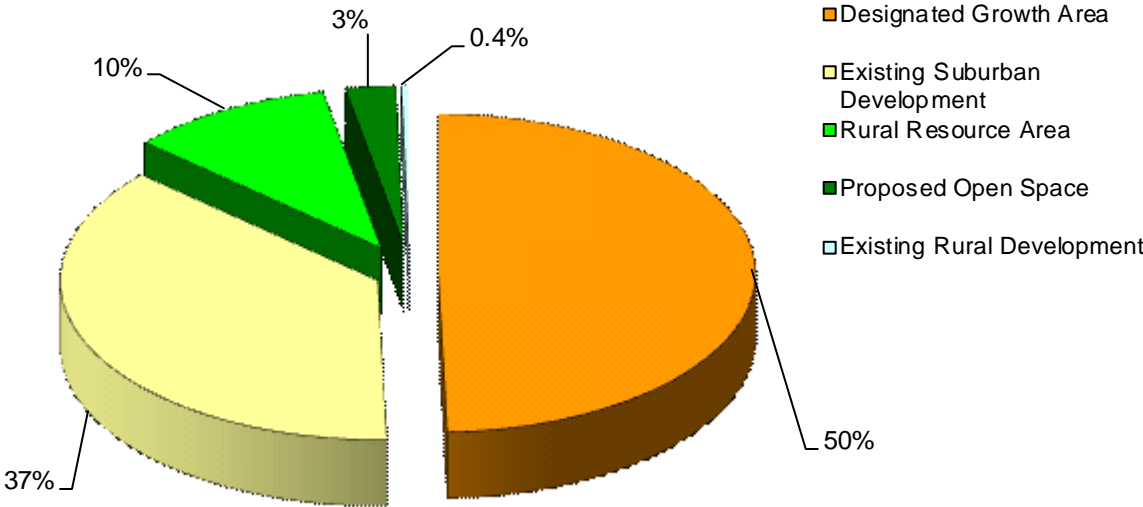
| Municipality | Total | Detached | Attached | Multifamily |
|-------------------|--------------|------------|------------|--------------|
| North Wales | 2 | 2 | 0 | 0 |
| Pennsburg | 0 | 0 | 0 | 0 |
| Perkiomen | 0 | 0 | 0 | 0 |
| Plymouth | 4 | 4 | 0 | 0 |
| Pottstown | 4 | 2 | 2 | 0 |
| Red Hill | 0 | 0 | 0 | 0 |
| Rockledge | 0 | 0 | 0 | 0 |
| Royersford | 0 | 0 | 0 | 0 |
| Salford | 0 | 0 | 0 | 0 |
| Schwenksville | 0 | 0 | 0 | 0 |
| Skippack | 120 | 120 | 0 | 0 |
| Souderton | 319 | 3 | 56 | 260 |
| Springfield | 39 | 0 | 39 | 0 |
| Telford | 0 | 0 | 0 | 0 |
| Towamencin | 48 | 0 | 48 | 0 |
| Trappe | 0 | 0 | 0 | 0 |
| Upper Dublin | 25 | 1 | 24 | 0 |
| Upper Frederick | 58 | 3 | 55 | 0 |
| Upper Gwynedd | 3 | 3 | 0 | 0 |
| Upper Hanover | 90 | 0 | 90 | 0 |
| Upper Merion | 2 | 0 | 2 | 0 |
| Upper Moreland | 0 | 0 | 0 | 0 |
| Upper Pottsgrove | 130 | 58 | 72 | 0 |
| Upper Providence | 550 | 94 | 152 | 304 |
| Upper Salford | 0 | 0 | 0 | 0 |
| West Conshohocken | 2 | 0 | 2 | 0 |
| West Norriton | 0 | 0 | 0 | 0 |
| West Pottsgrove | 0 | 0 | 0 | 0 |
| Whitemarsh | 258 | 1 | 257 | 0 |
| Whitpain | 28 | 22 | 0 | 6 |
| Worcester | 39 | 39 | 0 | 0 |
| Totals | 3,702 | 723 | 938 | 2,041 |

County Growth and Preservation Plan

The County Comprehensive Plan recommends that no more than 5% of new housing units should be located in rural resource areas. In 2013, almost 11% of housing units proposed were located within rural resource areas. The increase in residential development activity has put added pressure on some rural lands that had not been exposed to development interest while the market was subdued. Growth in rural areas is not expected to be eliminated, and some growth can be good for a rural economy. The County Comprehensive Plan suggests that residential density be limited to no more than one housing unit per acre, and ideally held at one unit per two acres. Proposals in the Rural Resource areas for 2013 averaged out to 0.9 units per acre, which is less than one unit per acre, but still above the ideal density.

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 2013, almost 97% 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 4.9 units per acre and the density in developed suburban areas was 7.8 units per acre. Overall, the density of all newly proposed development in 2013 was 3.5 units per acre.

Growth and Preservation Plan, Proposed Residential Units, 2013



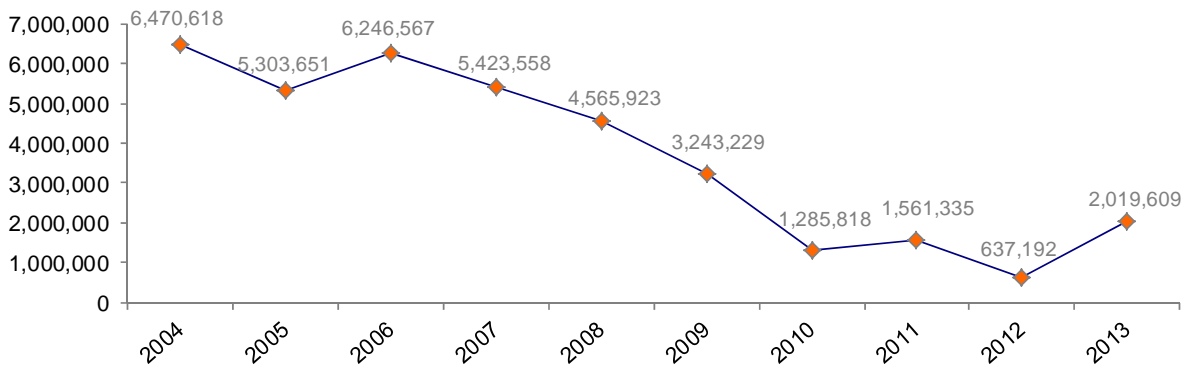
Section Four Nonresidential Submissions

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 2013, the amount of nonresidential square feet proposed for development more than tripled the historic low volume received in 2012. The total, 2,019,609 square feet is the highest amount proposed in the last four years, but it is still well below totals received in the 2000s. Putting this amount in perspective, between 1996 and 2007, the total square footage of nonresidential development proposed never dipped below 5 million square feet.

Proposed Nonresidential Square Footage, 2004 to 2013



Nonresidential Proposals by Type

Commercial development proposals almost tripled in 2013. It was the most active nonresidential category during the year resulting in its highest annual total over the last five years. This was despite there not being any singularly large development proposal such as a new shopping center. The largest new commercial proposal in 2013 was for an expansion to the King of Prussia Mall. The proposal would expand the mall with additional retail space connecting the Plaza and Court sections of the mall. 183,937 square feet of new retail space would be created while eliminating about 8,000 square feet of existing retail. The second largest commercial proposal was part of a mixed use development on the site of the former Souderton High School and included 180,680 square feet of retail space.

Proposed Development of Nonresidential Square Footage, 2012 - 2013

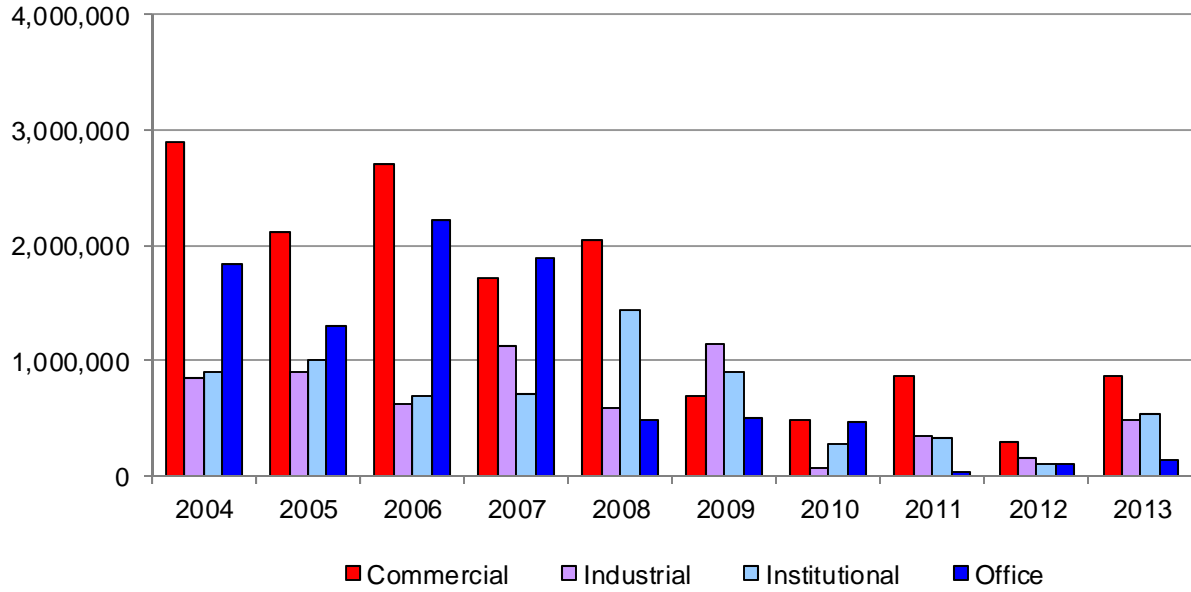
| Type | 2012 | 2013 | Change |
|---------------|----------------|------------------|-------------|
| Commercial | 296,511 | 871,069 | 194% |
| Industrial | 155,015 | 480,116 | 210% |
| Institutional | 91,896 | 535,707 | 483% |
| Office | 93,770 | 132,717 | 42% |
| Total | 637,192 | 2,019,609 | 217% |

Industrial square footage proposals did triple to 480,116 square feet proposed in 2013. A proposal for a new 196,940 square foot facility for Sheppard Redistribution, Inc., in Upper Providence was the largest nonresidential proposal in all of 2013.

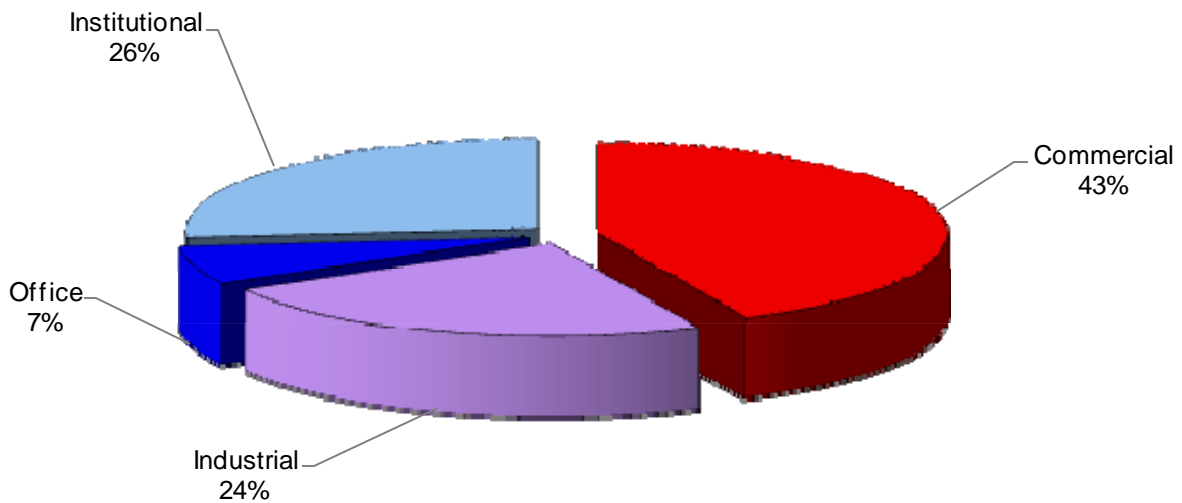
Institutional proposals increased the most in terms of percentage from 2012. This category tends to swing more wildly than the others from year to year due to the impact of large school, church, or health care-related proposals that come and go. Expansions and new facilities in continuing care or assisted living uses bolstered proposals in 2013 in addition to a new elementary school in Cheltenham. Fewer new public schools have been built recently due to stable or declining enrollments in many districts, but there were still about a dozen smaller renovations or additions to public and private schools submitted in 2013.

Office proposals also increased from 2012, but the total was still historically low as office vacancies have been high due to the recession and companies redefining how they use office space in some cases. A 42,500 square foot expansion to SEI Investments' campus in Oaks was the largest office proposal in 2013. Lower Gwynedd Township was the largest proposal, followed by a 34,000 square foot medical office building at the Linfield Corporate Center in Limerick Township.

Proposed Nonresidential Square Feet by Development Type, 2004 - 2013

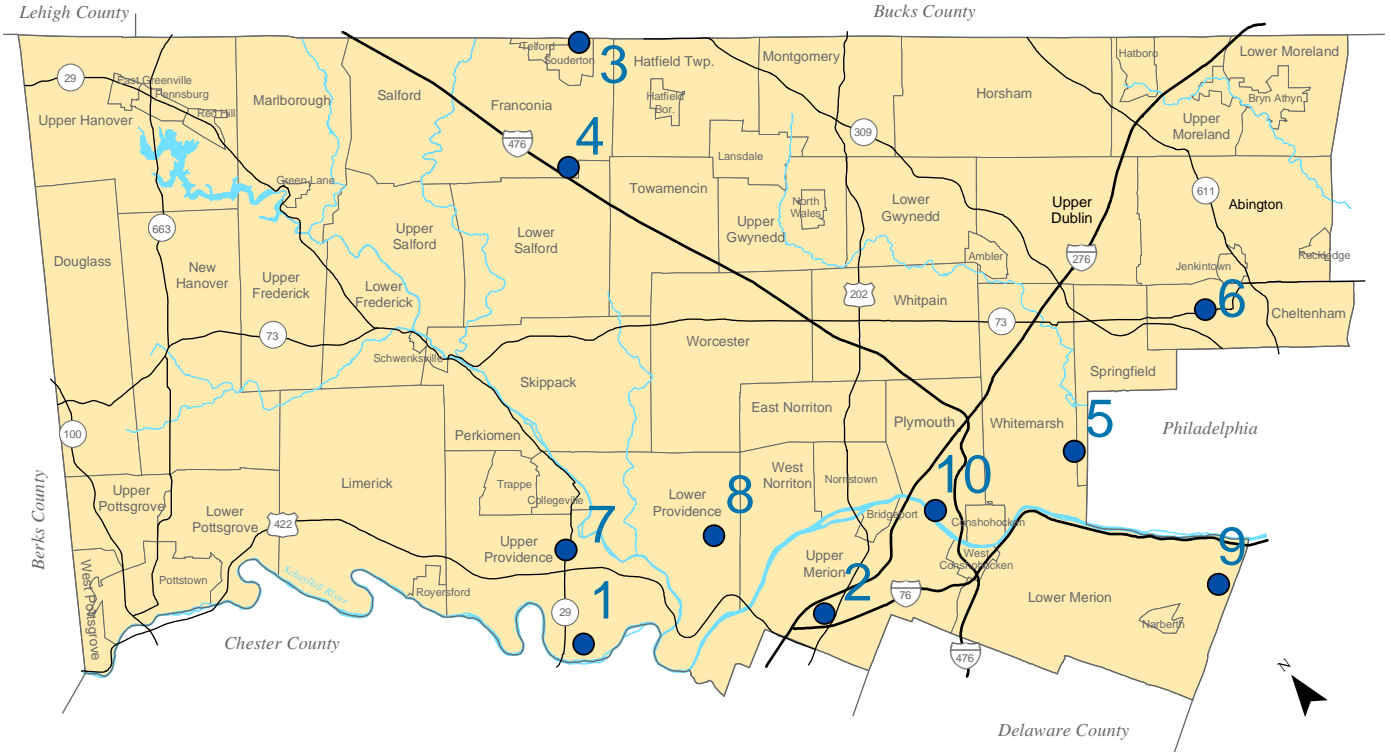


Proposed Nonresidential Square Footage, 2013



Section Four: Nonresidential Submissions

Location of Top Ten Largest Nonresidential Proposals, 2013



Montgomery County Largest Nonresidential Proposals, 2013

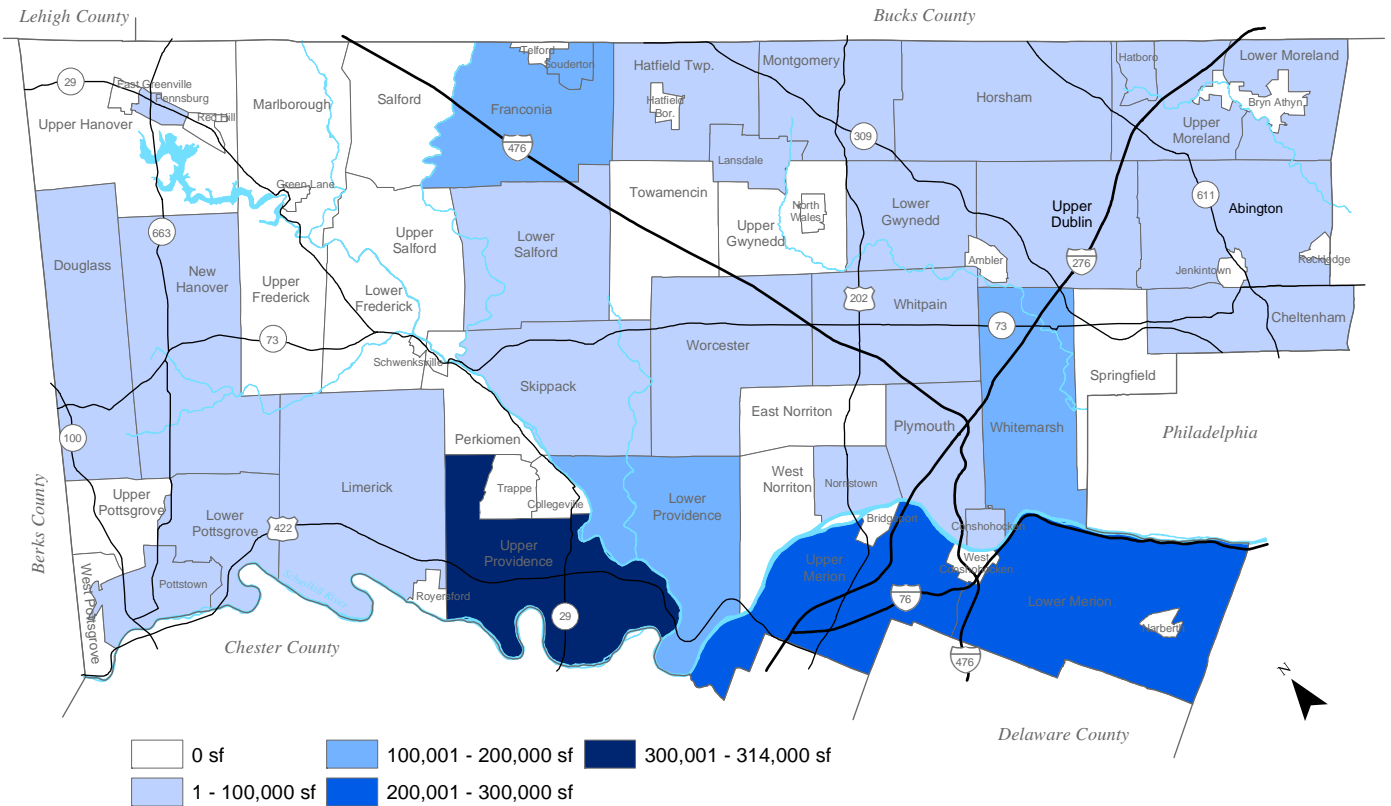
| | Development Name | Square Feet | Type | Municipality |
|-----|---|--------------------|---------------|---------------------|
| 1. | Sheppard Redistribution | 196,940 | Industrial | Upper Providence |
| 2. | The Expansion of King of Prussia Mall | 183,937 | Commercial | Upper Merion |
| 3. | Berkeley Court Phase 2 | 180,680 | Commercial | Souderton |
| 4. | Godshall Quality Meats New Facility | 147,900 | Industrial | Franconia |
| 5. | Masonic Village of Lafayette Hill | 100,500 | Institutional | Whitemarsh |
| 6. | Wyncote Elementary School | 84,831 | Institutional | Cheltenham |
| 7. | Emeritus At Collegeville Road | 74,560 | Institutional | Upper Providence |
| 8. | Shannondell - The Meadows - Phase 5.1 | 70,390 | Institutional | Lower Providence |
| 9. | BMW of the Mainline | 60,000 | Commercial | Lower Merion |
| 10. | 1000 Conshohocken Road - Norris Sales Co. | 55,000 | Industrial | Plymouth |

Nonresidential Square Footage Proposed for Development by Municipality

The table on the following page lists nonresidential square footage totals by type for each municipality. Upper Providence received the most square feet in proposals (314,000 square feet) while Lower Merion and Upper Merion followed with over 200,000 square feet proposed in each municipality.

The countywide map below shows that nonresidential development proposals were fairly spread out through the county. Over the last ten years, nonresidential activity has been very strong along the Rt. 422 corridor and in the North Penn Region (Lansdale and surrounding municipalities), but in 2013 more activity inched further to the east in places like Lower Merion, Upper Merion, and Whitmarsh.

Proposed Nonresidential Square Footage by Municipality, 2013



Section Four: Nonresidential Submissions

Proposed Nonresidential Square Footage by Municipality, 2013

| Municipality | Total | Commercial | Industrial | Institutional* | Office |
|-------------------|---------|------------|------------|----------------|--------|
| Abington | 34,550 | 10,250 | 0 | 0 | 24,300 |
| Ambler | 0 | 0 | 0 | 0 | 0 |
| Bridgeport | 0 | 0 | 0 | 0 | 0 |
| Bryn Athyn | 0 | 0 | 0 | 0 | 0 |
| Cheltenham | 96,701 | 9,950 | 0 | 86,751 | 0 |
| Collegeville | 0 | 0 | 0 | 0 | 0 |
| Conshohocken | 10,944 | 3,444 | 7,500 | 0 | 0 |
| Douglass | 5,051 | 5,051 | 0 | 0 | 0 |
| East Greenville | 0 | 0 | 0 | 0 | 0 |
| East Norriton | 0 | 0 | 0 | 0 | 0 |
| Franconia | 147,900 | 0 | 147,900 | 0 | 0 |
| Green Lane | 0 | 0 | 0 | 0 | 0 |
| Hatboro | 4,000 | 0 | 0 | 0 | 4,000 |
| Hatfield Borough | 0 | 0 | 0 | 0 | 0 |
| Hatfield Township | 15,000 | 0 | 15,000 | 0 | 0 |
| Horsham | 7,328 | 0 | 0 | 0 | 7,328 |
| Jenkintown | 0 | 0 | 0 | 0 | 0 |
| Lansdale | 21,560 | 21,560 | 0 | 0 | 0 |
| Limerick | 30,942 | 30,942 | 0 | 0 | 0 |
| Lower Frederick | 0 | 0 | 0 | 0 | 0 |
| Lower Gwynedd | 15,086 | 0 | 0 | 15,086 | 0 |
| Lower Merion | 225,275 | 161,253 | 0 | 64,022 | 0 |
| Lower Moreland | 500 | 0 | 0 | 0 | 500 |
| Lower Pottsgrove | 26,000 | 0 | 0 | 26,000 | 0 |
| Lower Providence | 121,311 | 41,630 | 9,291 | 70,390 | 0 |
| Lower Salford | 8,000 | 0 | 0 | 0 | 8,000 |
| Marlborough | 0 | 0 | 0 | 0 | 0 |
| Montgomery | 55,458 | 52,919 | 0 | 2,539 | 0 |
| Narberth | 0 | 0 | 0 | 0 | 0 |
| New Hanover | 31,276 | 31,276 | 0 | 0 | 0 |
| Norristown | 5,279 | 5,279 | 0 | 0 | 0 |

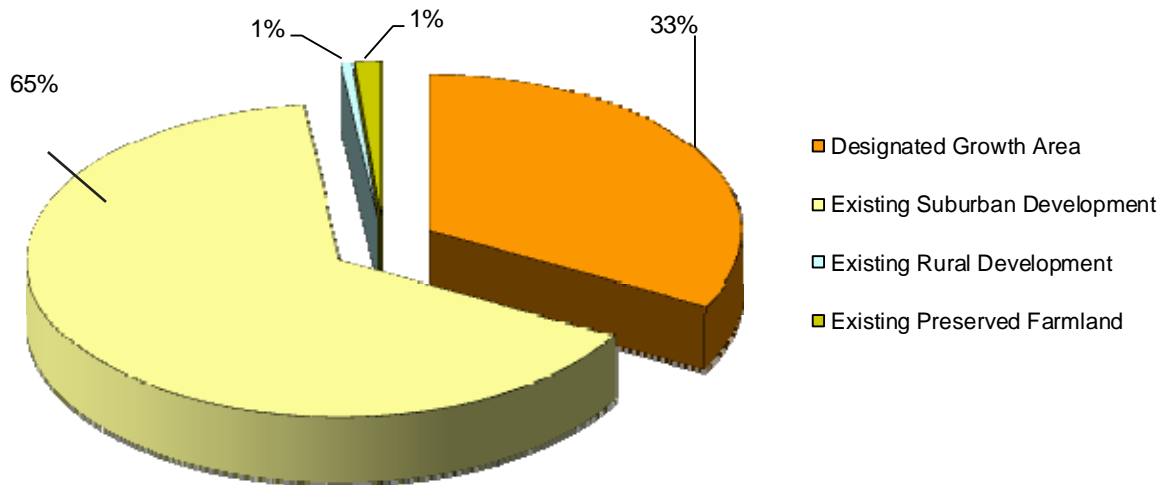
| Municipality | Total | Commercial | Industrial | Institutional* | Office |
|-------------------|------------------|----------------|----------------|----------------|----------------|
| North Wales | 0 | 0 | 0 | 0 | 0 |
| Pennsburg | 45,453 | 0 | 0 | 45,453 | 0 |
| Perkiomen | 0 | 0 | 0 | 0 | 0 |
| Plymouth | 83,978 | 7,217 | 71,531 | 5,230 | 0 |
| Pottstown | 28,009 | 8,240 | 9,000 | 3,512 | 7,257 |
| 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 | 14,400 | 0 | 14,400 | 0 | 0 |
| Souderton | 188,189 | 182,957 | 0 | 0 | 5,232 |
| Springfield | 0 | 0 | 0 | 0 | 0 |
| Telford | 0 | 0 | 0 | 0 | 0 |
| Towamencin | 0 | 0 | 0 | 0 | 0 |
| Trappe | 0 | 0 | 0 | 0 | 0 |
| Upper Dublin | 25,944 | 22,344 | 0 | 0 | 3,600 |
| Upper Frederick | 0 | 0 | 0 | 0 | 0 |
| Upper Gwynedd | 0 | 0 | 0 | 0 | 0 |
| Upper Hanover | 0 | 0 | 0 | 0 | 0 |
| Upper Merion | 208,704 | 204,392 | 2,000 | 2,312 | 0 |
| Upper Moreland | 31,489 | 15,535 | 2,354 | 13,600 | 0 |
| Upper Pottsgrove | 0 | 0 | 0 | 0 | 0 |
| Upper Providence | 314,000 | 0 | 196,940 | 74,560 | 42,500 |
| Upper Salford | 0 | 0 | 0 | 0 | 0 |
| West Conshohocken | 0 | 0 | 0 | 0 | 0 |
| West Norriton | 0 | 0 | 0 | 0 | 0 |
| West Pottsgrove | 0 | 0 | 0 | 0 | 0 |
| Whitemarsh | 161,825 | 15,000 | 0 | 116,825 | 30,000 |
| Whitpain | 46,030 | 41,830 | 4,200 | 0 | 0 |
| Worcester | 9,427 | 0 | 0 | 9,427 | 0 |
| Totals | 2,019,609 | 871,069 | 480,116 | 535,707 | 132,717 |

*Includes institutional and elderly institutional proposals.

County 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 2013, almost all of the 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. The only proposal outside of these areas was on a preserved farm, where a new barn and market for the farm was proposed.

Growth and Preservation Plan, Proposed Nonresidential Square Footage, 2013



Section Five Zoning Activity

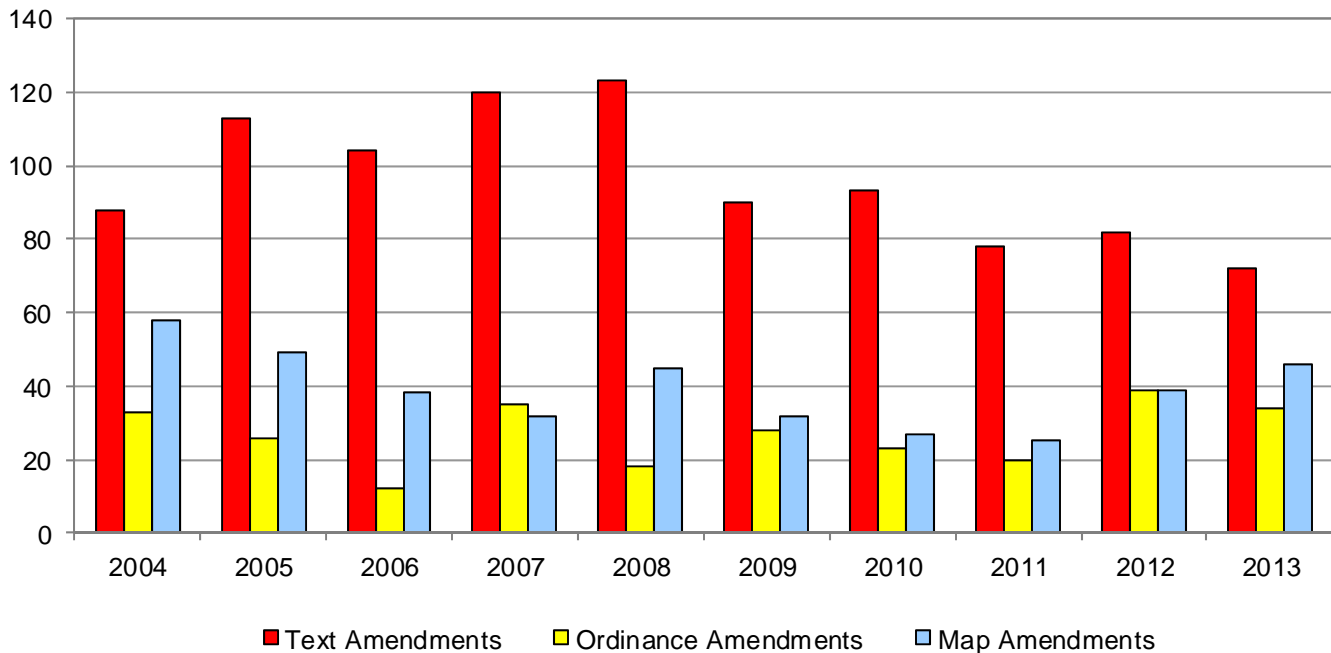
Zoning Amendments

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 152 proposed amendments to local zoning code ordinances and zoning maps. This was slightly down from the total last year (160), as well as the ten year average of 162.

In 2013, 34 zoning amendments were proposed to change significant portions of an entire ordinance, 72 amendments involved less significant changes to a single district, and another 46 involved map changes. Upper Dublin and Upper Providence Townships had the most amendments of all municipalities with 21 and 15 amendments, respectively.

Montgomery County Proposed Zoning Amendments: 2004 - 2013



Section Five: Zoning Activity

Zoning Activity by Municipality, 2013

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

| Municipality | Total | Map Amend. | Ordinance Amend. | Minor Text Amend. |
|-------------------|------------|------------|------------------|-------------------|
| North Wales | 1 | 0 | 0 | 1 |
| Pennsburg | 0 | 0 | 0 | 0 |
| Perkiomen | 1 | 0 | 0 | 1 |
| Plymouth | 3 | 1 | 0 | 2 |
| Pottstown | 2 | 0 | 0 | 2 |
| Red Hill | 2 | 0 | 0 | 2 |
| Rockledge | 1 | 0 | 1 | 0 |
| Royersford | 0 | 0 | 0 | 0 |
| Salford | 0 | 0 | 0 | 0 |
| Schwenksville | 1 | 0 | 0 | 1 |
| Skippack | 1 | 0 | 0 | 1 |
| Souderton | 0 | 0 | 0 | 0 |
| Springfield | 0 | 0 | 0 | 0 |
| Telford | 3 | 0 | 3 | 0 |
| Towamencin | 7 | 1 | 1 | 5 |
| Trappe | 1 | 0 | 0 | 1 |
| Upper Dublin | 21 | 10 | 5 | 6 |
| Upper Frederick | 2 | 1 | 1 | 0 |
| Upper Gwynedd | 2 | 1 | 1 | 0 |
| Upper Hanover | 0 | 0 | 0 | 0 |
| Upper Merion | 2 | 1 | 0 | 1 |
| Upper Moreland | 4 | 2 | 0 | 2 |
| Upper Pottsgrove | 0 | 0 | 0 | 0 |
| Upper Providence | 15 | 6 | 0 | 9 |
| Upper Salford | 0 | 0 | 0 | 0 |
| West Conshohocken | 1 | 0 | 1 | 0 |
| West Norriton | 3 | 2 | 0 | 1 |
| West Pottsgrove | 0 | 0 | 0 | 0 |
| Whitemarsh | 8 | 3 | 0 | 5 |
| Whitpain | 1 | 0 | 0 | 1 |
| Worcester | 8 | 2 | 3 | 3 |
| Total | 152 | 46 | 34 | 72 |

Section Six

Conclusion

Submissions

The number of submissions to the Planning Commission increased by almost a hundred in 2013 and marked the second annual increase in a row. After a decade of declining activity due to booming development activity ten years ago and a subsequent recession, county development activity appears to be recovering. A return back to the time of 1,000 submissions in the near future is not expected; however, an improving economy and gradual updates to infrastructure could sustain a period of continued growth.

Acreage Consumed

The amount of acreage proposed for development in 2013 increased substantially from totals in recent years. Proposals in terms of acreage were greater than expected due to a resurgence in residential proposals that not only involved high density redevelopment projects, but also a fair amount of moderately sized housing developments on unimproved land. While residential growth is a good sign after a period of trouble in the housing market, the growth in acreage proposed is also a reminder to encourage good design and qualities that preserve rural and neighborhood character.

Residential

In 2013, residential land development proposals were at their highest level since 2005. This was partly due to a robust market for apartment rentals in the Philadelphia Region, as over 2,000 multifamily units were proposed. It also indicates that the owner-occupied housing market is improving with gains in single family detached housing and townhouse proposals. The two largest proposals were both apartment projects in Conshohocken along its waterfront, but other large apartment proposals were made across the county in places like Upper Providence, Lansdale, Souderton, and Ambler.

The steady increase in proposals since 2010 is certainly a good sign. Although proposed projects do not always get built or even approved, an increase in proposals combined with new life in older projects that had been stalled due to the economy should gradually increase development approvals and construction in the years to come.

Nonresidential

Proposed nonresidential square footage also increased in 2013. All four of the major land use categories (commercial, industrial, institutional, and office) increased considerably from the previous year, which is a very positive trend. However, most sectors are still well behind the rates seen in previous decades.

Continual improvement in the economy should open up more opportunity for private enterprises to reinvent themselves and accommodate ongoing growth in the county and its many employment centers. Almost all of the nonresidential activity (93%) was located within designated growth areas or existing developed areas based on the County Comprehensive Plan.

Zoning

The Planning Commission received 152 proposed amendments to either the zoning code or zoning map of local municipalities. While this was slightly fewer than in recent years, the decline was more in terms of minor text amendments. The number of zoning map amendments and comprehensive ordinance amendments that proposed to create or revamp an entire district was actually higher than the ten year average. This could be a reflection of development pressure or changes in the market causing local governments to reassess the type and standards of development that best suits their municipality.



Montgomery County Planning Commission
Montgomery County, Pennsylvania