2021 Annual Summary

Subdivision, Land Development and Zoning Activity











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2021 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 2021. 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 2021 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 2021, there were no new developments proposed within the Village at Valley Forge.

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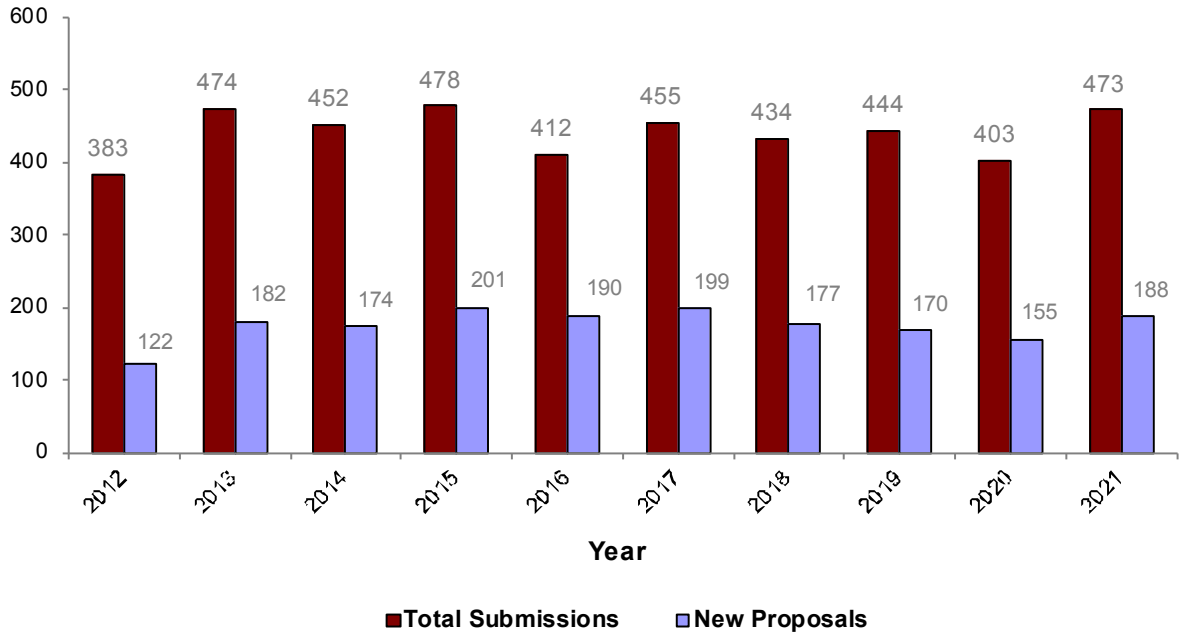
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Section One

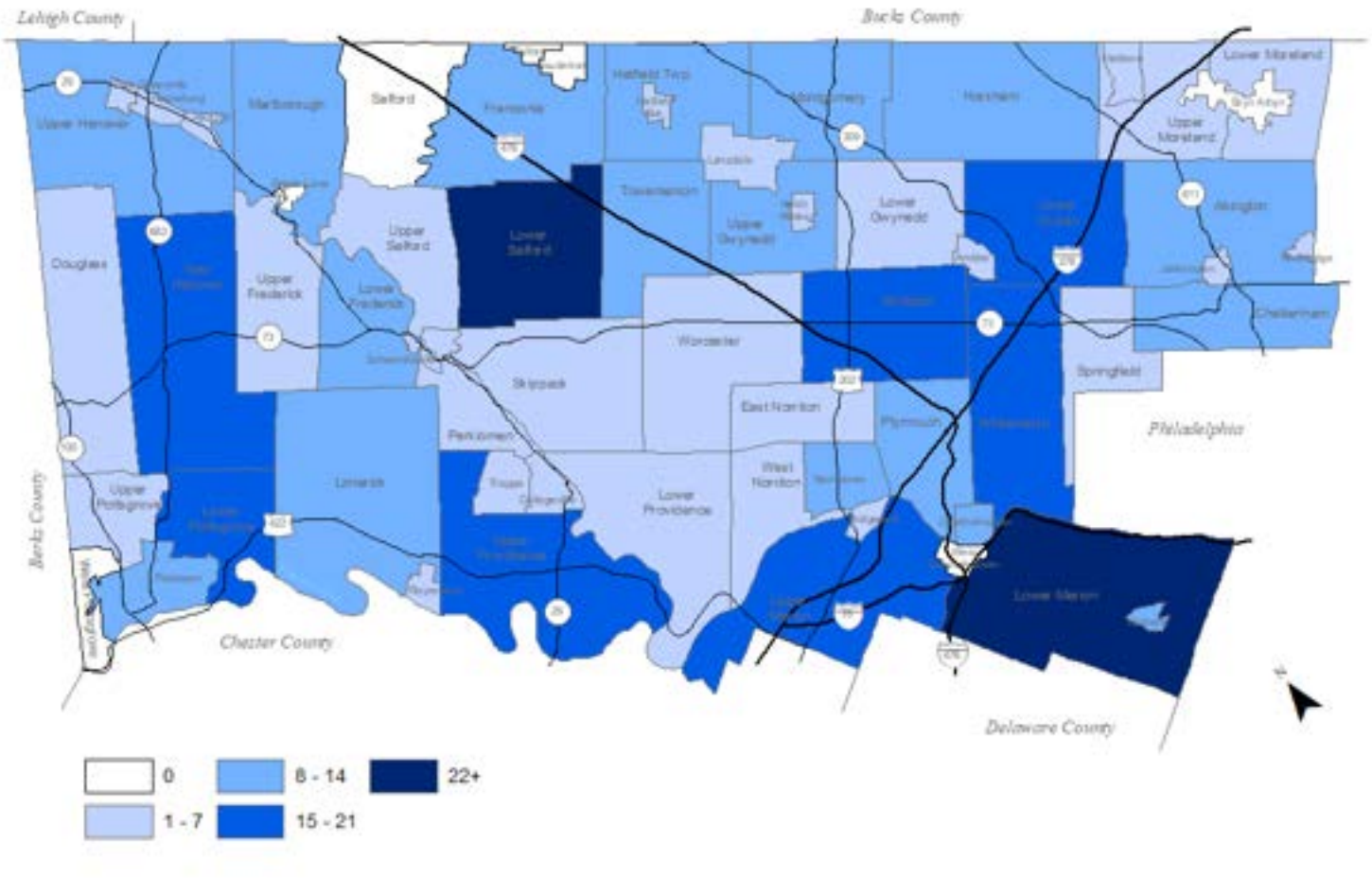
Number of Submissions

In 2021, the Planning Commission received 473 submissions for subdivision, land development, and zoning ordinance and map amendments. This was an increase of 17.4% compared to 2020. The 2021 submissions included 188 new proposals for land developments or subdivisions that had not been previously submitted with similar land use and density components.

Total Annual Submissions, 2012 to 2021



Number of Submissions by Municipality, 2021



A look at the county map above reveals that submission activity in 2021 was relatively evenly spread throughout the county, but a bit more frequent in the southeastern and western sections of the county. By far, Lower Merion had the most submissions with a total of 48. Lower Salford ranked second with a total of 24.

Montgomery County Submissions by Municipality, 2021

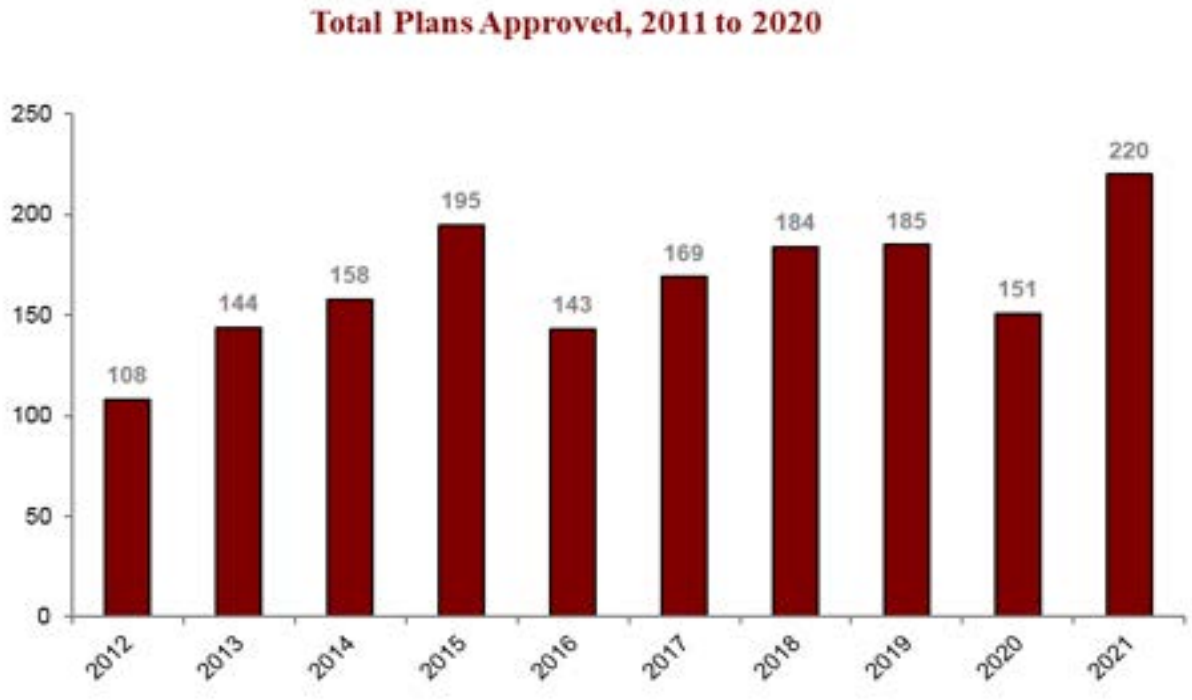
Municipality	Total	Land Developments	Subdivisions
Abington	8	4	1
Ambler	6	1	1
Bridgeport	5	2	2
Bryn Athyn	0	0	0
Cheltenham	8	3	2
Collegeville	6	4	2
Conshohocken	10	5	1
Douglass	5	3	3
East Greenville	4	0	0
East Norriton	6	4	0
Franconia	9	5	4
Green Lane	0	0	0
Hatboro	6	4	2
Hatfield Borough	2	2	2
Hatfield Township	14	10	3
Horsham	12	7	4
Jenkintown	1	1	0
Lansdale	3	3	0
Limerick	13	8	6
Lower Frederick	8	2	1
Lower Gwynedd	4	4	1
Lower Merion	48	37	17
Lower Moreland	5	4	1
Lower Pottsgrove	15	9	4
Lower Providence	4	4	2
Lower Salford	24	9	2
Marlborough	9	1	0
Montgomery	11	6	3
Narberth	11	10	9
New Hanover	17	6	6
Norristown	8	5	2

Municipality	Total	Land Developments	Subdivisions
North Wales	1	0	0
Pennsburg	2	2	2
Perkiomen	4	3	2
Plymouth	9	6	3
Pottstown	8	4	1
Red Hill	3	2	2
Rockledge	1	1	1
Royersford	4	3	0
Salford	0	0	0
Schwenksville	4	0	0
Skippack	6	5	2
Souderton	0	0	0
Springfield	7	4	1
Telford	0	0	0
Towamencin	12	8	1
Trappe	3	2	0
Upper Dublin	19	13	3
Upper Frederick	1	0	0
Upper Gwynedd	8	4	1
Upper Hanover	10	6	1
Upper Merion	18	8	3
Upper Moreland	6	1	1
Upper Pottsgrove	2	2	2
Upper Providence	19	14	10
Upper Salford	1	0	0
West Conshohocken	0	0	0
West Norriton	2	0	0
West Pottsgrove	0	0	0
Whitemarsh	16	9	7
Whitpain	18	11	9
Worcester	7	2	7
Totals	***473***	***273***	***140***

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. The municipal total does not include submissions from outside of the county.

Approved Plans

In 2021, 220 plans were recorded as a final plan by their respective municipalities for the first time. The highest amount in a decade. These plans were not necessarily submitted in 2021. 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.

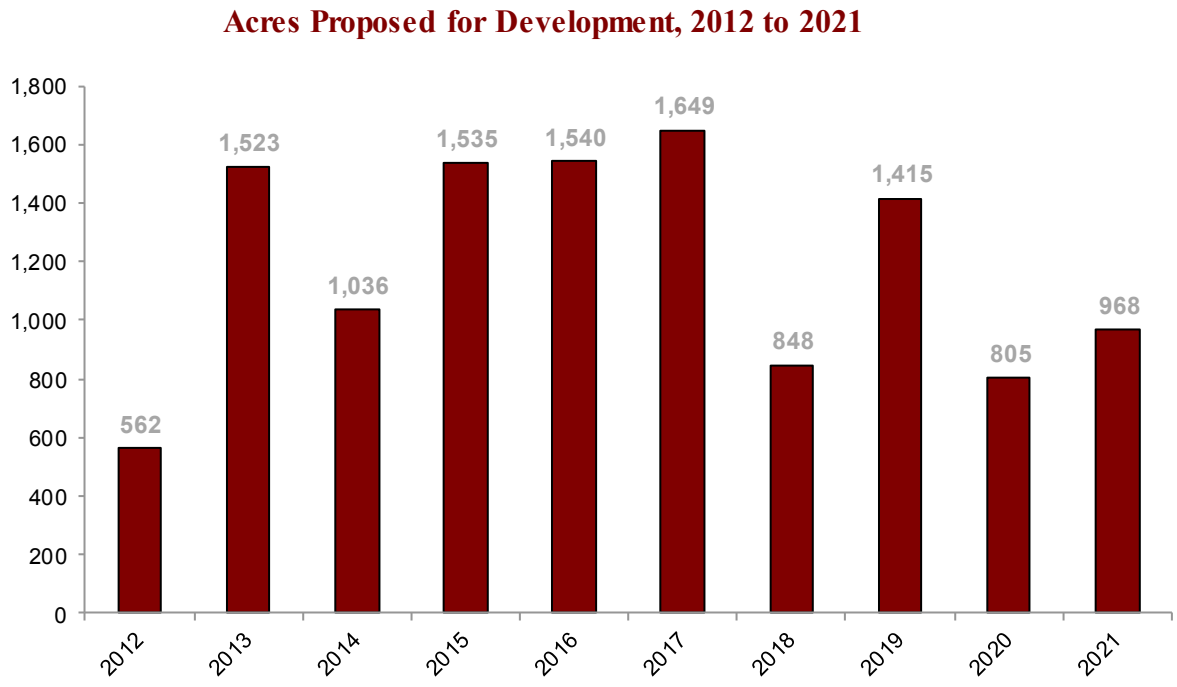


Section Two

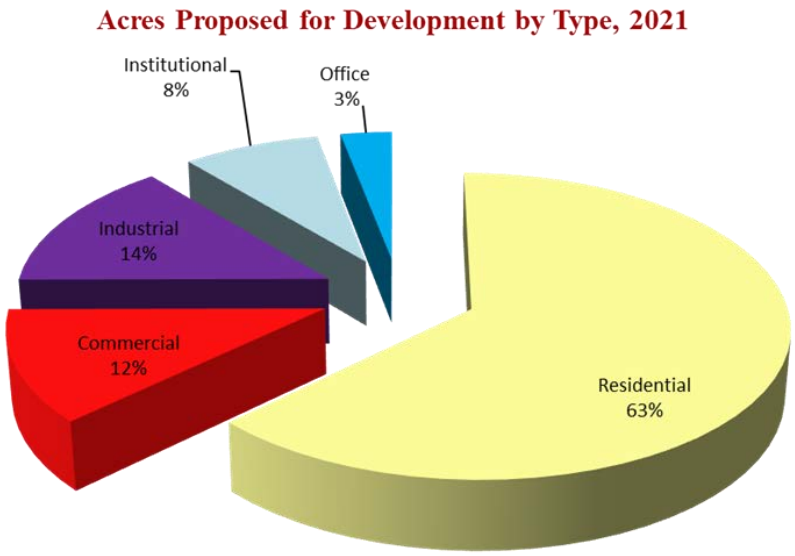
Acreage of Submissions

Countywide Acres Proposed for Development

The total amount of land proposed for development in 2021, which excludes land set aside for municipal use, open space, agricultural lands, recreation areas, transportation or utilities, was 968 acres. This is a an increase from the previous year. Going forward, fewer impacted acres are still likely due to the trends of redevelopment, infill, and expansions on existing sites.



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 2021 with 63% of acreage proposed going toward residential uses. This is a slight percentage increase from last year. Nonresidential land uses remain popular, especially industrial uses which have been growing in recent years. Office proposals accounted for 3% in 2021, an increase from the prior year, even with continued uncertainty due to the Covid-19 pandemic's effect on the office market. Despite residential land use being the single largest type proposed in terms of acreage, nonresidential land uses still accounted for 37% of total acreage proposed.



The amount of land proposed in 2021 for residential use (608 acres) represents a significant increase from the previous year. A rebound in residential activity occurred 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.

Total nonresidential acreage proposed amounted to 360 acres in 2021 which is a slight increase from the year prior at 344. This figure, while lower than previous years, still represents a significant amount of nonresidential square footage proposed mainly due to large-scale industrial proposals.

Acres Proposed for Development by Municipality

The table on the opposite page shows the distribution of proposed acres throughout the county. In 2021, New Hanover and Lower Merion led the county with 151 acres and 79 acres proposed for development, respectively. Other leading municipalities included Hatfield Township, Franconia, and Upper Merion.

Montgomery County Acres Proposed For Development by Municipality, 2021

Municipality	Total	Nonresidential	Residential
Abington	2	2	0
Ambler	0	0	0
Bridgeport	0	0	0
Bryn Athyn	0	0	0
Cheltenham	9	1	8
Collegeville	1	0	1
Conshohocken	19	0	19
Douglass	9	0	9
East Greenville	0	0	0
East Norriton	18	18	0
Franconia	59	29	30
Green Lane	0	0	0
Hatboro	2	2	0
Hatfield Borough	3	0	3
Hatfield Township	61	60	1
Horsham	38	34	4
Jenkintown	1	0	1
Lansdale	2	0	2
Limerick	53	23	30
Lower Frederick	31	11	20
Lower Gwynedd	29	19	10
Lower Merion	79	35	44
Lower Moreland	3	1	2
Lower Pottsgrove	12	11	1
Lower Providence	10	2	8
Lower Salford	14	8	6
Marlborough	2	2	0
Montgomery	3	1	2
Narberth	0	0	0
New Hanover	151	5	146
Norristown	4	0	4

Municipality	Total	Nonresidential	Residential
North Wales	0	0	0
Pennsburg	1	0	1
Perkiomen	1	0	1
Plymouth	15	1	14
Pottstown	5	5	0
Red Hill	0	0	0
Rockledge	0	0	0
Royersford	20	7	13
Salford	0	0	0
Schwenksville	0	0	0
Skippack	33	1	32
Souderton	0	0	0
Springfield	3	1	2
Telford	0	0	0
Towamencin	12	9	3
Trappe	28	1	27
Upper Dublin	23	3	20
Upper Frederick	0	0	0
Upper Gwynedd	7	1	6
Upper Hanover	14	13	1
Upper Merion	59	34	25
Upper Moreland	3	3	0
Upper Pottsgrove	38	0	38
Upper Providence	57	12	45
Upper Salford	0	0	0
West Conshohocken	0	0	0
West Norriton	0	0	0
West Pottsgrove	0	0	0
Whitemarsh	5	2	3
Whitpain	16	3	13
Worcester	13	0	13
Totals	**968**	**360**	**608**

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

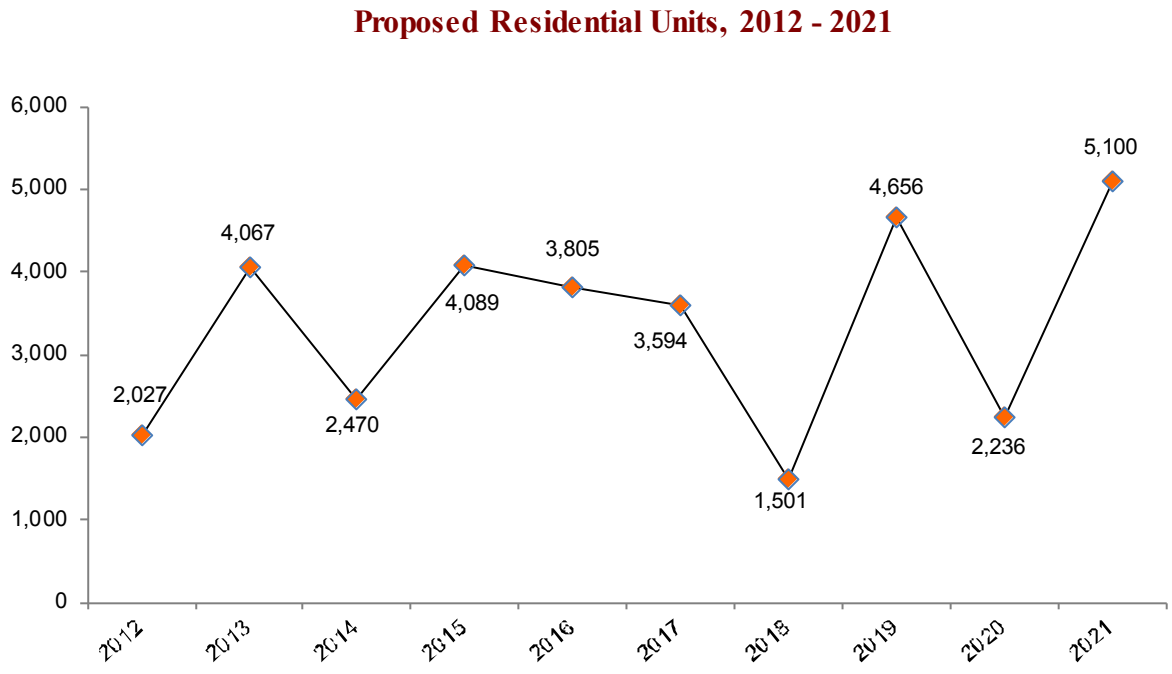
Acreage Proposed for Development on Previously Developed Sites

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 2021, 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. This percentage is the same as the decade average.

Section Three
Residential Submissions

Proposed Residential Development

There were 5,100 units proposed in 2021, which marks a sharp increase from the previous year. This year's total was the highest since 2005 and reflects a market that has rebounded from the Covid-19 pandemic. In addition, historically low inventories of homes for sale has further stoked the homebuilding industry. The amount proposed in 2021 is also the third highest proposed since 1995 and represents a strong addition to an already deep pipeline of residential development proposals within Montgomery County.

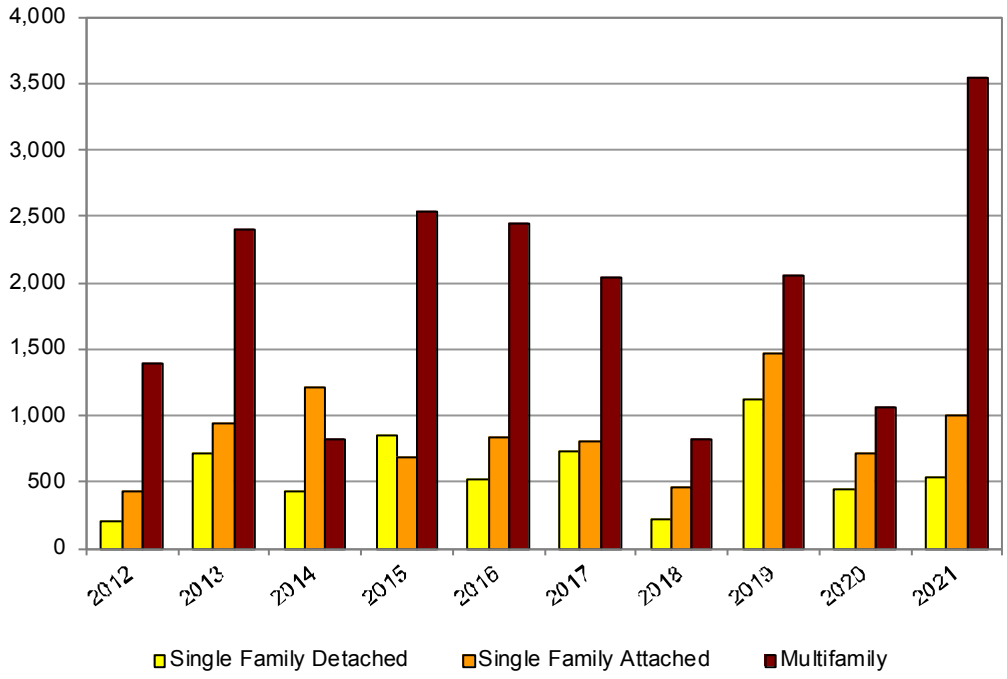


Residential Proposals by Type

Since 2006, the densest housing type, multifamily, has frequently accounted for nearly half of all the units proposed in a given year. The booming rental apartment market has certainly held an influence, but other changes also drive this trend. Market preference has shifted towards walkability and urbanized lifestyles which incorporate mixed-uses. New zoning changes have permitted new multifamily development in different areas like business parks, commercial corridors, and transit-oriented developments.

All housing types saw an increase in units from last year. Single family housing types continue to gain higher percentages than a few years prior. Multifamily has surged in proposals to represent a majority of all residential development proposed, but in general, the market for new multifamily units may start to soften while demand for single family housing types increases.

Proposed Residential Units by Type, 2012 - 2021

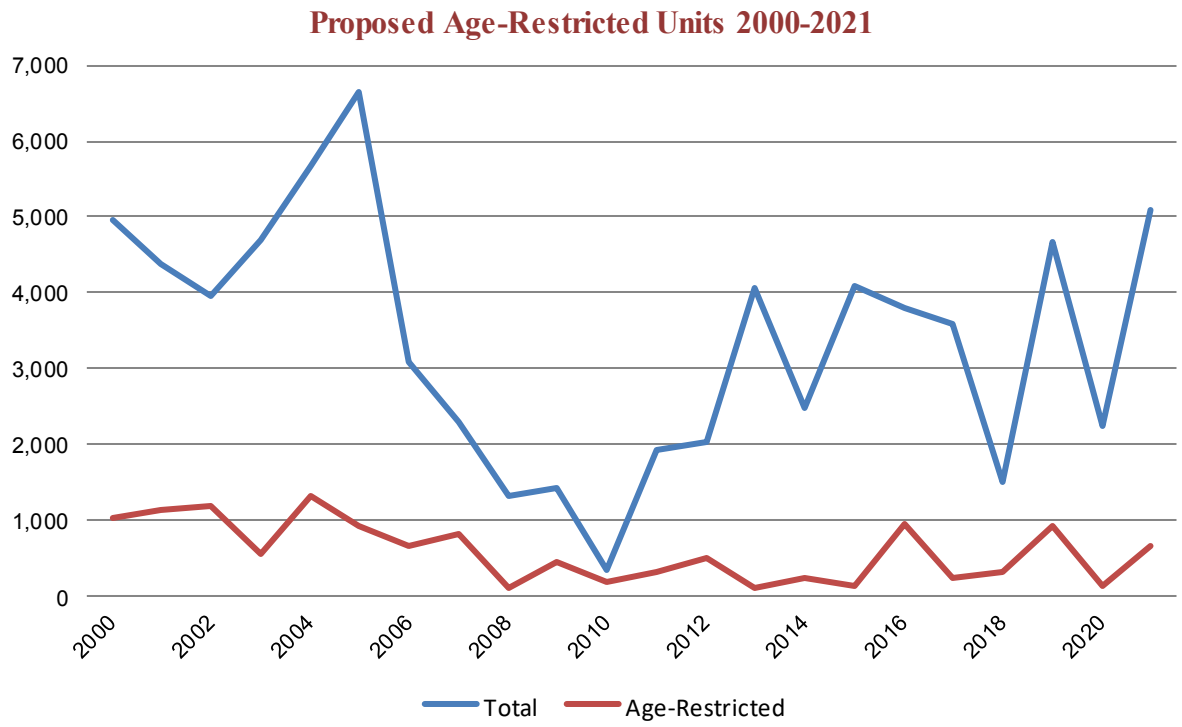


Proposed Development of Residential Housing Units, 2020- 2021

Housing Type	2020	2021	Change
Single Family Detached	453	540	19%
Single Family Attached	723	1,009	40%
Multifamily	1,060	3,551	235%

Age-Restricted Housing Development

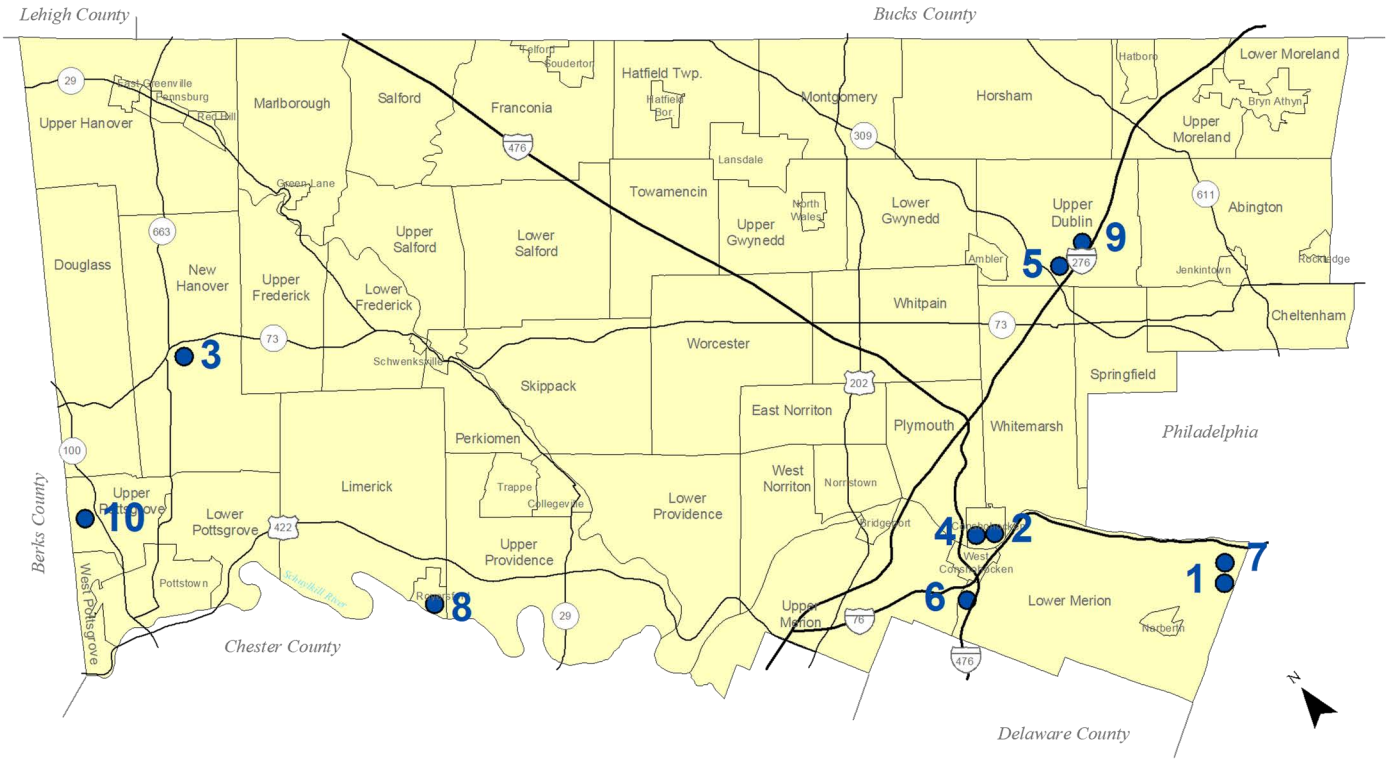
There were two proposals that accounted for 654 age-restricted units proposed in 2021 — one multi-type and one attached. The largest development, Hanover Meadows in New Hanover, accounted for 520 units split amongst the three types with the most units proposed being attached. The percent of all housing proposed attributed to age-restricted units was 13% in 2021. While this does represent an increase in percentage, it often fluctuates from year to year. Developers and municipalities may also give 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.



Largest Residential Proposals

The list of the largest residential proposals on the following page emphasizes how multifamily housing types were yet again the strongest category in 2021. Nine out of the top ten residential proposals in 2021 included multifamily structures. One proposal constituted a mix of housing types rather than just one. Lower Merion had the most units proposed at 1,558 total units, consisting of 12 different developments with the vast majority being multifamily units. Conshohocken had the second most units proposed at 928 units, with nearly all of those units being multifamily except for two attached units. The largest developments proposed in 2021 were spread across the county and represented the continued trend of denser development being placed in various environments from greenfields to more urbanized boroughs.

Location of Top Ten Largest Residential Proposals, 2021



Montgomery County Largest Residential Proposals, 2021

	Development Name	Units	Type	Municipality
1.	One, Two, and Three Bala Plaza	757	MF	Lower Merion
2.	401-433 Washington Street	598	MF	Conshohocken
3.	Hanover Meadows *	520	MF, SFA, SFD	New Hanover
4.	400 West Elm Street	352	MF	Conshohocken
5.	J @ Dresher	310	MF	Upper Dublin
6.	104,108,114,120,124,130,150 & 198 W. Lancaster Ave	279	MF	Lower Merion
7.	121 E City Ave	220	MF	Lower Merion
8.	The Riverfront at Royersford	188	MF	Royersford
9.	1250 Virginia Drive	171	MF	Upper Dublin
10.	Kummerer Parcel—Phase 2B *	134	SFA	Upper Pottsgrove

** Indicates Age-Restricted*

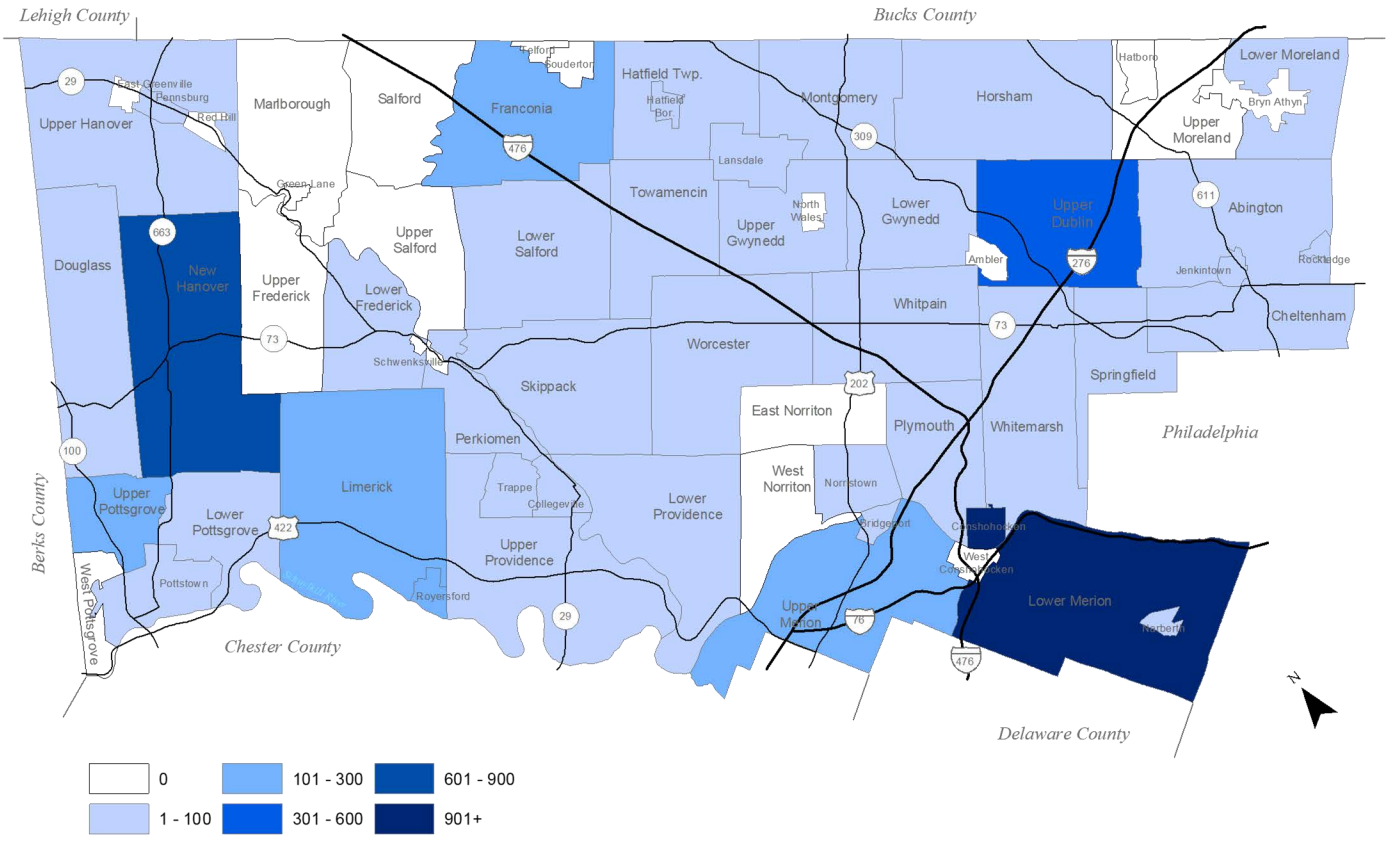
Residential Units Proposed for Development by Municipality

The table on the following page lists proposed residential unit totals by type for each municipality. Lower Merion received a total of 1,558 units proposed, making it the only municipality to receive over 1,000 units. Conshohocken, Franconia, Limerick, New Hanover, Royersford, Upper Dublin, Upper Merion, and Upper Pottsgrove all had totals above 100 units.

Geographically, the countywide map below shows the distribution of residential activity that has been received by municipalities. It still shows that major projects and smaller scale infill development proposals are being made in eastern and central areas of the county. The western end of the county showed more proposal activity this year.

Nearly a third of the county's municipalities were quiet in terms of new residential activity, with 18 of the county's 62 municipalities not receiving a new residential proposal in 2021.

Proposed Housing Units by Municipality, 2021



Montgomery County Proposed Residential Units by Municipality, 2021

Municipality	Total	Detached	Attached	Multifamily
Abington	1	1	0	0
Ambler	0	0	0	0
Bridgeport	4	1	3	0
Bryn Athyn	0	0	0	0
Cheltenham	9	9	0	0
Collegeville	4	1	0	3
Conshohocken	973	0	2	971
Douglass	5	5	0	0
East Greenville	0	0	0	0
East Norriton	0	0	0	0
Franconia	106	64	42	0
Green Lane	0	0	0	0
Hatboro	0	0	0	0
Hatfield Bor	22	0	22	0
Hatfield Twp	5	1	4	0
Horsham	3	3	0	0
Jenkintown	26	0	0	26
Lansdale	35	0	8	27
Limerick	143	14	129	0
Lower Frederick	42	42	0	0
Lower Gwynedd	6	6	0	0
Lower Merion	1,558	8	0	1,550
Lower Moreland	1	1	0	0
Lower Pottsgrove	1	1	0	0
Lower Providence	28	28	0	0
Lower Salford	48	0	0	48
Marlborough	0	0	0	0
Montgomery	3	3	0	0
Narberth	3	1	2	0
New Hanover	687	139	452	96
Norristown	70	0	34	36

Municipality	Total	Detached	Attached	Multifamily
North Wales	0	0	0	0
Pennsburg	8	2	6	0
Perkiomen	4	2	0	2
Plymouth	55	23	0	32
Pottstown	2	0	2	0
Red Hill	0	0	0	0
Rockledge	1	1	0	0
Royersford	266	0	0	266
Salford	0	0	0	0
Schwenksville	0	0	0	0
Skippack	67	59	8	0
Souderton	0	0	0	0
Springfield	2	2	0	0
Telford	0	0	0	0
Towamencin	2	2	0	0
Trappe	26	26	0	0
Upper Dublin	481	0	0	481
Upper Frederick	0	0	0	0
Upper Gwynedd	26	9	17	0
Upper Hanover	2	2	0	0
Upper Merion	131	2	123	6
Upper Moreland	0	0	0	0
Upper Pottsgrove	136	2	134	0
Upper Providence	57	57	0	0
Upper Salford	0	0	0	0
West Conshohocken	0	0	0	0
West Norriton	0	0	0	0
West Pottsgrove	0	0	0	0
Whitemarsh	28	2	19	7
Whitpain	15	13	2	0
Worcester	8	8	0	0
Totals	**5,100**	**540**	**1,009**	**3,551**

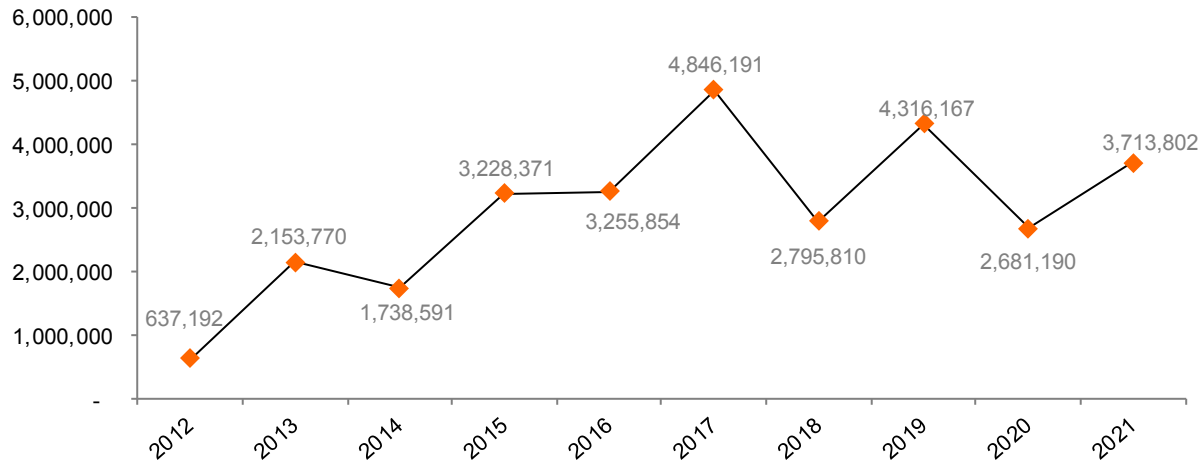
Section Four
Nonresidential Submissions

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 the 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 2021, the amount of nonresidential square feet proposed for development increased from the prior year. The total, 3,713,802 square feet is well above the post-recession era numbers of the previous decade and reflects that the economy is relatively solid within Montgomery County despite the lingering effects of the Covid-19 pandemic.

Proposed Nonresidential Square Footage, 2012 to 2021



Nonresidential Proposals by Type

Proposed commercial development square footage grew in 2021 and increased by 24%. Commercial activity is usually the most active category but it has been more moderate the past few years as other categories continue to gain momentum. The largest single commercial development proposal was for a self-storage facility in Upper Dublin at 118,094 square feet. Another major commercial development is the proposed addition of retail and restaurants to the extensive redevelopment of One, Two, and Three Bala Plaza in Lower Merion.

Proposed Development of Nonresidential Square Footage, 2020 - 2021

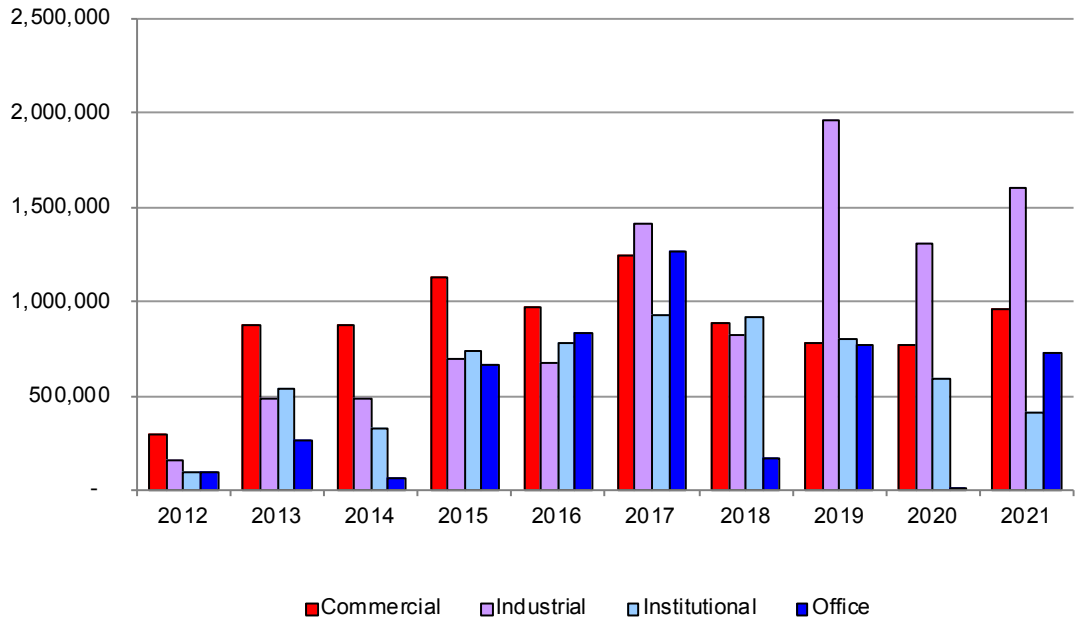
Type	2020	2021	Change
Commercial	771,963	960,291	**24%**
Industrial	1,308,287	1,606,548	**23%**
Institutional	590,451	414,406	**-30%**
Office	10,489	732,557	**6,884%**
Total	**2,681,190**	**3,713,802**	**39%**

Industrial continued its growing dominance in terms of nonresidential square footage proposed relative to the other uses. Six of the ten largest nonresidential submissions were industrial in 2021. Speculative warehouse construction continues to increase in Montgomery County as e-commerce rises and distribution networks intensify—a trend accelerated by the Covid-19 pandemic. The total square footage of these six proposals make up over 63% of all industrial square footage proposed in 2021. The largest was 2501 & 2901 Renaissance Boulevard with 362,200 square feet of flex space.

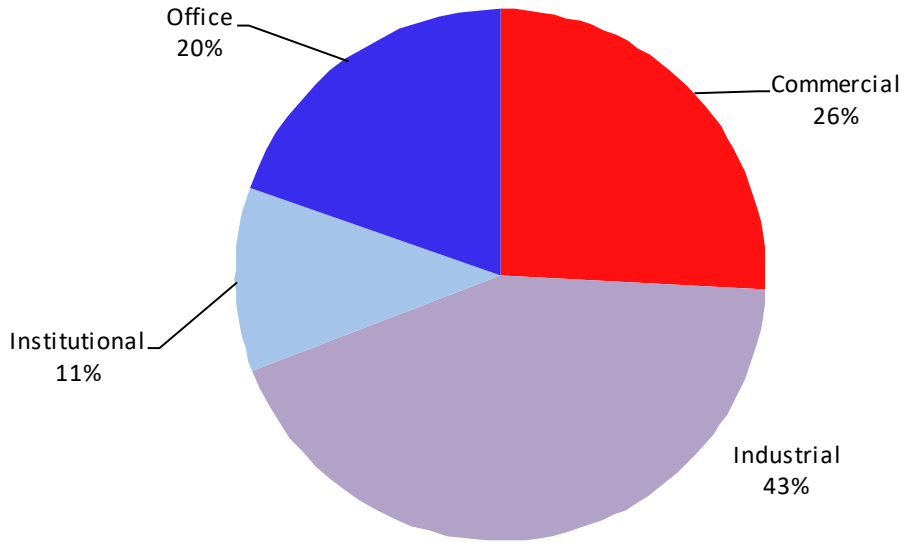
Institutional decreased by 30% in 2021 to a total of 414,406 square feet proposed. The largest proposal was for the 158,954 square foot Keith Valley Middle School and District Administrative Offices in Horsham which was followed by the new St. Charles Borromeo Seminary with 104,052 square feet in Lower Gwynedd. An expansion of the Souderton Mennonite Home in Franconia was a distant third with 37,644 square feet.

Office square footage increased dramatically since 2020, a significant rebound from the acute effect on office proposals as a result of the ongoing Covid-19 pandemic. There were a total of 8 office proposals in 2021 totaling 732,557 square feet. The largest proposal was an office building in the One, Two, and Three Bala Plaza redevelopment. Working from home is likely to continue in some form after the pandemic subsides. However, this slate of proposals shows that there is still a market for new office spaces within Montgomery County.

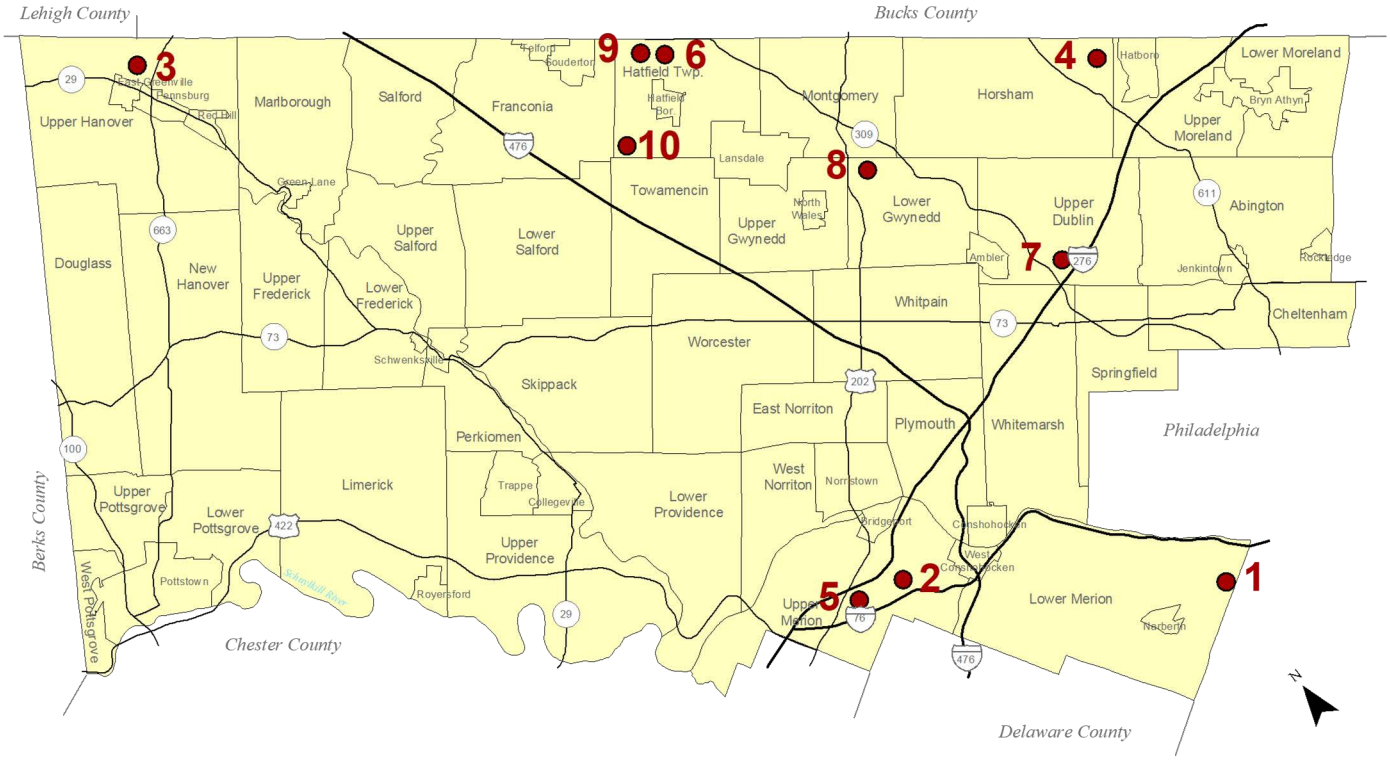
Proposed Nonresidential Square Feet by Development Type, 2012 - 2021



Proposed Nonresidential Square Footage, 2021



Location of Top Ten Largest Nonresidential Proposals, 2021



Montgomery County Largest Nonresidential Proposals, 2021

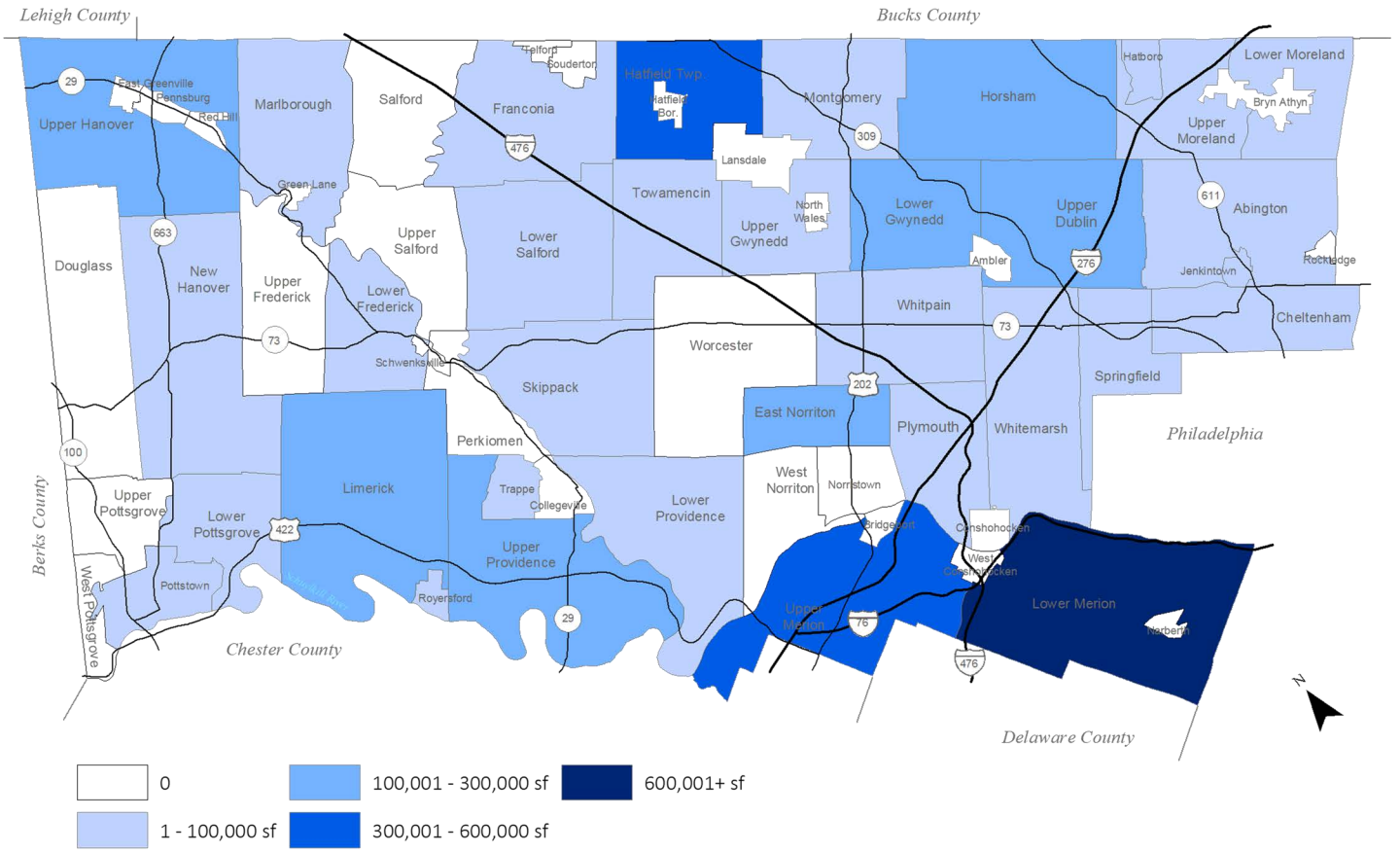
	Development Name	Square Feet	Type	Municipality
1.	One, Two, and Three Bala Plaza	989,329	C, PO	Lower Merion
2.	2501 & 2901 Renaissance Blvd	362,200	IND	Upper Merion
3.	2512 Quakertown Road	166,255	IND	Upper Hanover
4.	Keith Valley Middle School and District Administrative Offices	158,954	INS	Horsham
5.	201 South Gulph Road	144,040	IND	Upper Merion
6.	Campus Drive Building Expansion	140,353	IND	Hatfield Township
7.	1055 Virginia Drive	118,094	C	Upper Dublin
8.	ST. Charles Borromeo Seminary	104,052	INS	Lower Gwynedd
9.	Sterling Business Center-Lot 1B	100,800	IND	Hatfield Township
10.	Derstine Business Center	100,340	IND	Hatfield Township

Nonresidential Square Footage Proposed for Development by Municipality

The table on the following page lists nonresidential square footage totals by type for each municipality. Lower Merion received the most square feet in proposals (1,093,820 square feet) while Upper Merion and Hatfield Township were the only other municipalities to receive more than 400,000 square feet. East Norriton, Horsham, Limerick, Lower Gwynedd, Upper Dublin, Upper Hanover, and Upper Providence followed with over 100,000 square feet proposed in each municipality.

The countywide map below shows that nonresidential development proposals in 2021 were spread throughout the county, but heaviest in the southeastern and north central sections. Nonresidential activity is strongest around areas with good access to the regional highway network.

Proposed Nonresidential Square Footage by Municipality, 2021



Proposed Nonresidential Square Footage by Municipality, 2021

Municipality	Total	Commercial	Industrial	Institutional	Office
Abington	8,192	0	0	8,192	0
Ambler	0	0	0	0	0
Bridgeport	0	0	0	0	0
Bryn Athyn	0	0	0	0	0
Cheltenham	20,678	0	0	20,678	0
Collegeville	0	0	0	0	0
Conshohocken	0	0	0	0	0
Douglass	0	0	0	0	0
East Greenville	0	0	0	0	0
East Norriton	123,120	123,120	0	0	0
Franconia	90,906	35,262	0	37,644	18,000
Green Lane	0	0	0	0	0
Hatboro	5,585	5,585	0	0	0
Hatfield Bor	0	0	0	0	0
Hatfield Twp	481,974	24,361	440,274	17,339	0
Horsham	164,022	5,068	0	158,954	0
Jenkintown	1,351	1,351	0	0	0
Lansdale	0	0	0	0	0
Limerick	136,805	50,805	86,000	0	0
Lower Frederick	66,400	0	66,400	0	0
Lower Gwynedd	122,533	4,760	0	114,997	2,776
Lower Merion	1,093,820	394,666	0	4,862	694,292
Lower Moreland	7,600	0	7,600	0	0
Lower Pottsgrove	85,738	60,738	25,000	0	0
Lower Providence	22,200	0	0	22,200	0
Lower Salford	49,636	0	49,636	0	0
Marlborough	13,976	0	13,976	0	0
Montgomery	7,315	7,315	0	0	0
Narberth	0	0	0	0	0
New Hanover	24,672	24,672	0	0	0
Norristown	0	0	0	0	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	4,452	3,352	0	0	1,100
Pottstown	14,756	9,685	788	0	4,283
Red Hill	0	0	0	0	,0
Rockledge	0	0	0	0	0
Royersford	31,146	28,146	0	0	3,000
Salford	0	0	0	0	0
Schwenksville	0	0	0	0	0
Skippack	928	928	0	0	0
Souderton	0	0	0	0	0
Springfield	2,100	2,100	0	0	0
Telford	0	0	0	0	0
Towamencin	64,185	6,445	40,200	17,540	0
Trappe	5,000	0	0	0	5,000
Upper Dublin	118,094	118,094	0	0	0
Upper Frederick	0	0	0	0	0
Upper Gwynedd	96,803	0	96,803	0	0
Upper Hanover	179,040	5,585	173,455	0	0
Upper Merion	516,124	9,884	506,240	0	0
Upper Moreland	18,745	18,745	0	0	0
Upper Pottsgrove	0	0	0	0	0
Upper Providence	114,282	10,000	100,176	0	4,106
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	6,442	6,442	0	0	0
Whitpain	15,182	3,182	0	12,000	0
Worcester	0	0	0	0	0
Totals	**3,713,802**	**960,291**	**1,606,548**	**414,406**	**732,557**

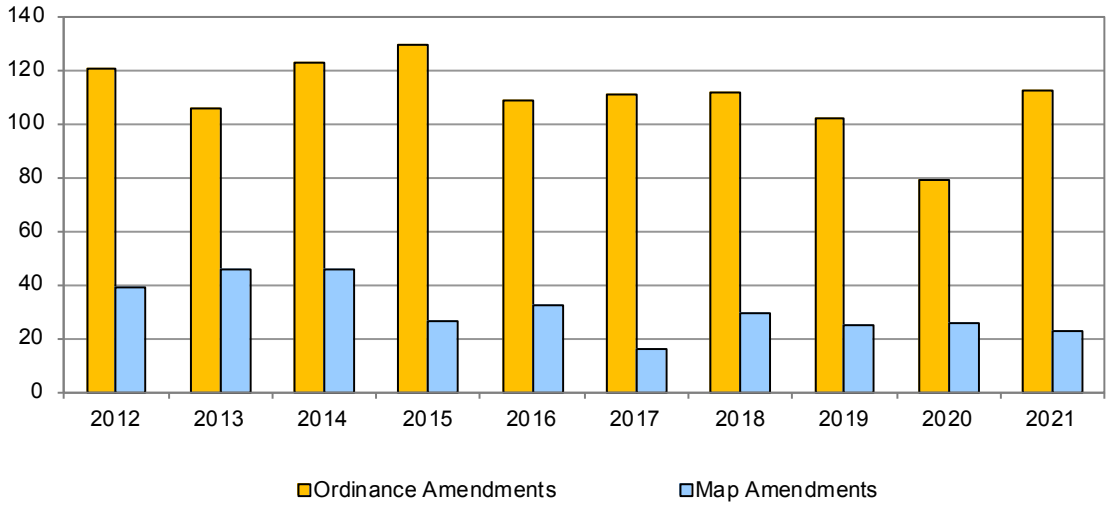
Section Five
Zoning Activity

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 136 proposed amendments to local zoning code ordinances and zoning maps. This was up from the total last year (105) and just below the ten year average of 141. There were 113 ordinance amendments and 23 zoning map proposals. Upper Merion and Lower Salford had the most amendments of all municipalities with 9 each. The county also reviews amendments to local Subdivision and Land Development Ordinances (SALDO), but these are not included in the zoning totals. Last year there were 14 SALDO amendments proposed.

Montgomery County Proposed Zoning Amendments: 2012 - 2021



Zoning Activity by Municipality, 2021

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

Municipality	Total	Map Amend.	Ordinance Amend.
North Wales	1	0	1
Pennsburg	0	0	0
Perkiomen	2	1	1
Plymouth	1	1	0
Pottstown	3	0	3
Red Hill	1	0	1
Rockledge	0	0	0
Royersford	0	0	0
Salford	0	0	0
Schwenksville	6	2	4
Skippack	1	0	1
Souderton	0	0	0
Springfield	1	0	1
Telford	0	0	0
Towamencin	4	1	3
Trappe	2	1	1
Upper Dublin	4	0	4
Upper Frederick	0	0	0
Upper Gwynedd	2	1	1
Upper Hanover	3	2	1
Upper Merion	9	0	9
Upper Moreland	2	0	2
Upper Pottsgrove	0	0	0
Upper Providence	4	2	2
Upper Salford	1	0	1
West Conshohocken	0	0	0
West Norriton	2	0	2
West Pottsgrove	0	0	0
Whitemarsh	4	1	3
Whitpain	1	0	1
Worcester	6	1	5
Total	**136**	**23**	**113**

Section Six
Conclusion

Submissions
The number of submissions to the Planning Commission (473) increased in 2021 from the previous year and was above the five year average of 440. Proposal activity, while variable, has been generally trending upwards for some time. However, as the county continues to be built-out, opportunities for new development become scarce and the volume of proposals has the potential to decrease. This year's total number of submissions was likely boosted by the ongoing recovery from the Covid-19 pandemic. Proposal activity is well above the post-recession lows seen last decade.

Acreage Consumed
The amount of acreage proposed for development in 2021 was 968 acres. Generally, smaller lot sizes and less unimproved land are driving average acreage totals down for new developments. 2021 saw an increase from the prior year's acreage proposed for development, mainly due to a few more large-scale developments which were proposed this year.

Residential
Residential land development proposals increased by over 128% from 2020 and the total number of units proposed was the highest since 2005. 5,100 units were proposed with multifamily housing continuing to be the dominant form. Multifamily units are still benefitting from the relatively robust market for apartment rentals in the Philadelphia Region. However, this trend seems to be cooling nationally, and other housing types are gaining popularity. As millennials age into their thirties and start to form families, the county continues to see a tightening in the market for single family detached and attached homes. These young families may not be seeking the large homes and lots of the few generations before them, but they seem to be driving a nascent return to single family home construction as evidenced by our local real estate dynamics and number of proposals.

As Upper Merion continues to wrap up large-scale construction projects at the Village at Valley Forge, the majority of multifamily housing proposals are now seen elsewhere. Lower Merion, Conshohocken, and Upper Dublin also saw major multifamily projects proposed near employment centers and major transportation corridors in 2021.

Nonresidential
Proposed nonresidential square footage also increased significantly in 2021 but still showed renewed

strength especially when it came to industrial, commercial, and office developments. The office sector has been facing numerous challenges for years and the challenges have been made more complicated by the Covid-19 pandemic, but as the economy continues to improve and municipalities address the changing needs and desires of companies, this sector seems to be rebounding with over 730,000 square feet proposed in 2021.

The industrial sector saw the highest square footage proposed in 2021. This type of development is in high demand in Montgomery County with five of the top ten largest nonresidential proposals in 2021 being industrial. In the last few years, speculative warehouse development has driven industrial sector growth. E-commerce's continued rise, accelerated by the pandemic, will continue to drive demand for more warehouse space in the county. In addition, the county has begun to see other types of industrial developments being proposed in recent years, such as purpose-built facilities and flex-spaces.

Zoning

The Planning Commission received 136 proposed amendments to either the zoning code or zoning map of local municipalities. This was an increase from the prior year.



Montgomery County Planning Commission

Montgomery County, Pennsylvania