# MCPC

Montgomery County Data: Nonresidential

2015 Nonresidential Construction
Montgomery County, Pennsylvania

In 2015, nonresidential construction in Montgomery County increased by over 380,000 SF. This represents an increase of 51 percent from the prior year. Continuing economic growth, both at the national level and locally, contributed to this increase as some institutions, municipalities, and businesses are in a better financial position to expand their built assets. In years past, the most significant growth of nonresidential square footage was attributed to commercial and institutional uses. The drivers of nonresidential growth this year were more evenly spread across a number of categories as opposed to being concentrated within a few.
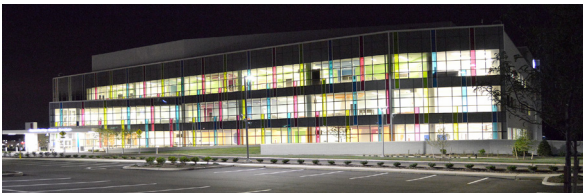
CHOP Specialty Care & Surgery Center King of Prussia

While no one category dominated 2015 in terms of built square footage, commercial accounted for the most construction at 298,053 square feet. The next highest category was institutional, the majority of which came from two sources, the new CHOP facility in King of Prussia and Wyncote Elementary School in Cheltenham. Also of note is the rise in municipal facility construction. A number of boroughs and townships built new town halls, police stations, and ambulance facilities.

Commercial development, which includes retail, consumer services, and hotels was the largest category for construction this year but still well below absolute totals from previous years. The retail industry is evolving and adding new formats each year. Many older shopping centers in the county have welcomed new services and businesses into them that would have traditionally been seen outside of the strip mall format. Also, the upcoming King of Prussia mall expansion and new mixed-use developments with retail are signs that commercial development is evolving to meet new needs.
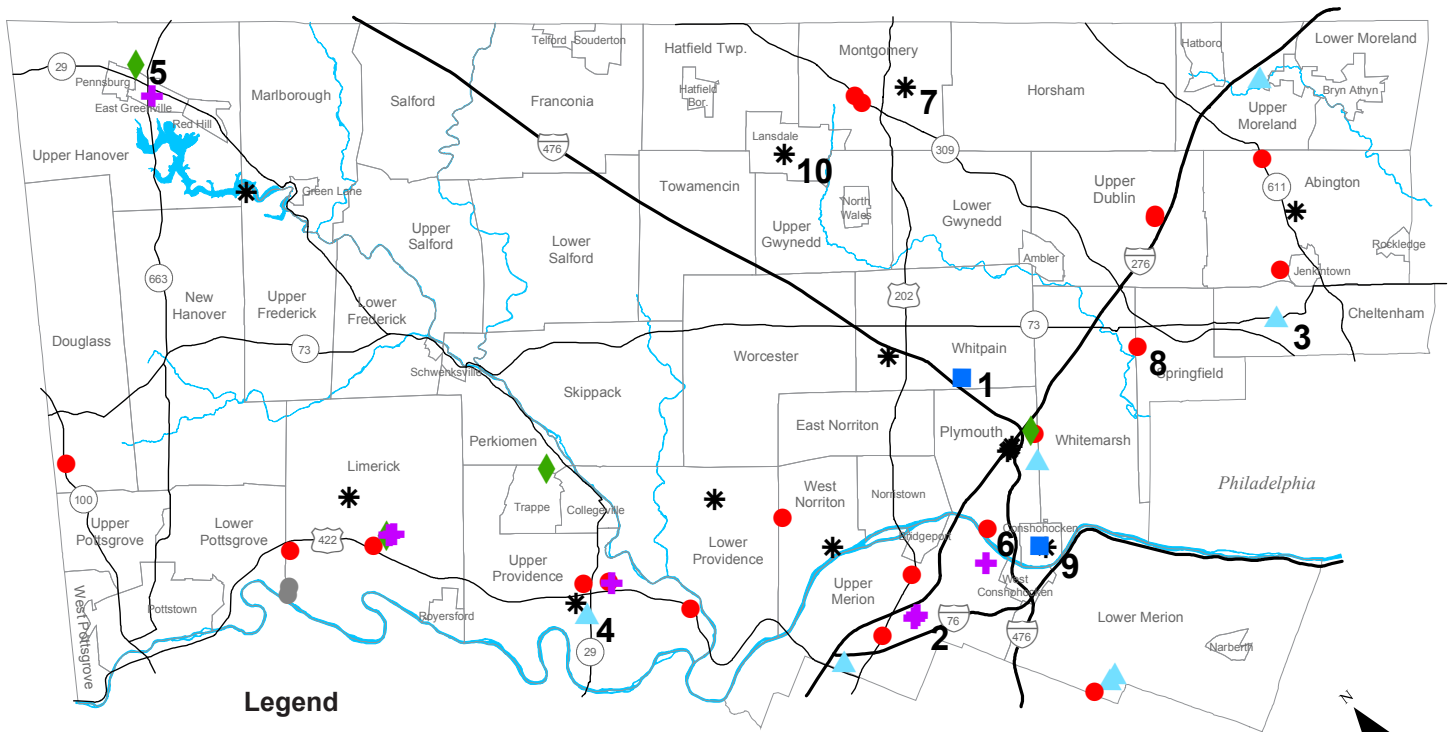
Nonresidential Square Footage by Land Use from 2009 to 2015

	2009	2010	2011	2012	2013	2014	2015
Commercial	1,699,508	699,970	436,156	821,010	359,877	520,477	298,053
Industrial	250,054	248,199	22,698	69,629	98,542	31,282	29,727
Institutional	938,387	1,026,802	437,959	795,034	643,289	41,214	277,194
Institutional Elderly	62,666	61,703	0	200,201	63,466	0	105,975
Municipal	20,078	7,272	127,084	14,712	1,025	5,297	231,916
Office	635,418	360,980	66,442	229,853	218,942	116,270	160,512
Recreation	11,556	24,899	5,796	13,442	12,829	21,518	16,148
Transportation	1,244	0	0	24,418	0	0	0
Utilities	7,889	0	9,373	3,000	0	13,890	16,507
Total	**3,626,800**	**2,429,825**	**1,105,508**	**2,171,299**	**1,397,970**	**749,948**	**1,136,032**

The data was derived from county tax records available from the Board of Assessment Appeals and includes not only new buildings but additions to existing structures. Instead of using the exact date of the completion of construction, this database assigns a year built value to each property on the date which it was originally assessed. This is typically after the completion of construction and can sometimes be several months to a year later. Therefore, construction completed in 2015 may not appear in the 2015 recordset, although it would be accounted for in next year's report. Past years are also updated to account for development not entered into the system at the time of this report.

2015 Nonresidential Land Development by Land Use

Legend

- 🔴 Commercial
- ➕ Industrial
- 🔺 Institutional
- ✳ Municipal
- 🟦 Office
- 🔷 Recreation
- 🟡 Transportation
- ⚫ Utility

Top Ten projects noted by numeral (see table below).

	TOP TEN LARGEST NONRESIDENTIAL PROJECTS IN 2015			
Rank	**Project Name**	**Municipality**	**Land Use**	**Total Square Feet**
1	Hillcrest III	Whitpain	Office	144,354
2	Children's Hospital of Philadelphia - KOP	Upper Merion	Institutional	124,720
3	Wyncote Elementary School	Cheltenham	Institutional	92,965
4	Brandywine Living at Upper Providence	Upper Providence	Institutional Elderly	91,633
5	Upper Perkiomen YMCA	Upper Hanover	Commercial	68,931
6	Norris Sales	Plymouth	Commercial	45,880
7	Montgomery Township Recreation Center	Montgomery	Municipal	38,713
8	Movie Tavern	Springfield	Commercial	38,616
9	Conshohocken Borough Hall and Police Department	Conshohocken	Municipal	37,251
10	Lansdale Borough Municipal Building	Lansdale	Municipal	34,193

Square Feet by Land Use and Municipality

Municipality	Commercial	Industrial	Institutional Elderly	Institutional	Municipal	Office	Recreation	Transportation	Utility	Total
					LAND USE TYPES					
Abington	6,752	0	0	0	3,400	0	0	0	0	10,152
Ambler	0	0	0	0	0	0	0	0	0	0
Bridgeport	0	0	0	0	0	0	0	0	0	0
Bryn Athyn	0	0	0	0	0	0	0	0	0	0
Cheltenham	0	0	0	92,965	0	0	0	0	0	92,965
Collegeville	0	0	0	0	0	0	0	0	0	0
Conshohocken	0	0	0	0	37,251	16,158	0	0	0	53,409
Douglass	5,525	0	0	0	0	0	0	0	0	5,525
East Greenville	0	0	0	0	0	0	0	0	0	0
East Norriton	0	0	0	0	0	0	0	0	0	0
Franconia	0	0	0	0	0	0	0	0	0	0
Green Lane	0	0	0	0	0	0	0	0	0	0
Hatboro	0	0	0	0	0	0	0	0	0	0
Hatfield Borough	0	0	0	0	0	0	0	0	0	0
Hatfield Township	0	0	0	0	0	0	0	0	0	0
Horsham	0	0	0	0	0	0	0	0	0	0
Jenkintown	0	0	0	0	0	0	0	0	0	0
Lansdale	0	0	0	0	34,193	0	0	0	0	34,193
Limerick	32,267	9,864	0	0	24,204	0	4,902	0	16,507	87,744
Lower Frederick	0	0	0	0	0	0	0	0	0	0
Lower Gwynedd	0	0	0	0	0	0	0	0	0	0
Lower Merion	11,335	0	0	54,543	0	0	0	0	0	65,878
Lower Moreland	0	0	0	0	0	0	0	0	0	0
Lower Pottsgrove	0	0	0	0	0	0	0	0	0	0
Lower Providence	0	0	0	0	6,732	0	0	0	0	6,732
Lower Salford	0	0	0	0	0	0	0	0	0	0
Marlborough	0	0	0	0	0	0	0	0	0	0
Montgomery	7,493	0	0	0	38,713	0	0	0	0	46,206
Narberth	0	0	0	0	0	0	0	0	0	0
New Hanover	0	0	0	0	0	0	0	0	0	0
Norristown	0	0	0	0	0	0	0	0	0	0
North Wales	0	0	0	0	0	0	0	0	0	0
Pennsburg	0	7,500	0	0	0	0	0	0	0	7,500
Perkiomen	15,335	0	0	0	0	0	0	0	0	15,335
Plymouth	54,063	0	0	4,966	67,128	0	11,246	0	0	137,403
Pottstown	0	0	0	0	0	0	0	0	0	0
Red Hill	0	0	0	0	0	0	0	0	0	0
Rockledge	0	0	0	0	0	0	0	0	0	0
Royersford	0	0	0	0	0	0	0	0	0	0
Salford	0	0	0	0	0	0	0	0	0	0
Schwenksville	0	0	0	0	0	0	0	0	0	0
Skippack	0	0	0	0	0	0	0	0	0	0
Souderton	0	0	0	0	0	0	0	0	0	0
Springfield	38,616	0	0	0	0	0	0	0	0	38,616
Telford	0	0	0	0	0	0	0	0	0	0
Towamencin	0	0	0	0	0	0	0	0	0	0
Trappe	0	0	0	0	0	0	0	0	0	0
Upper Dublin	19,459	0	0	0	0	0	0	0	0	19,459
Upper Frederick	0	0	0	0	324	0	0	0	0	324
Upper Gwynedd	0	0	0	0	0	0	0	0	0	0
Upper Hanover	68,931	0	0	0	0	0		0	0	68,931
Upper Merion	20,299	11,138	0	124,720	0	0	0	0	0	156,157
Upper Moreland	0	0	14,342	0	0	0	0	0	0	14,342
Upper Pottsgrove	0	0	0	0	0	0	0	0	0	0
Upper Providence	9,978	1,225	91,633	0	13,427	0	0	0	0	116,263
Upper Salford	0	0	0	0	0	0	0	0	0	0
West Conshohocken	0	0	0	0	0	0	0	0	0	0
West Norriton	8,000	0	0	0	544	0	0	0	0	8,544
West Pottsgrove	0	0	0	0	0	0	0	0	0	0
Whitemarsh	0	0	0	0	0	0	0	0	0	0
Whitpain	0	0	0	0	6,000	144,354	0	0	0	150,354
Worcester	0	0	0	0	0	0	0	0	0	0
Total	**298,053**	**29,727**	**105,975**	**277,194**	**231,916**	**160,512**	**16,148**	**0**	**16,507**	**1,136,032**

Consistency of 2015 Nonresidential Location
with the County Comprehensive Plan

The Planning Commission tracks where new construction is located in relation to the county's Development Potential map, which is part of our adopted county comprehensive plan. The map classifies all land within the county according to one of three broad categories, Growth Areas, Rural Resource Areas, and Open Space Preservation Areas. Each has its own list of recommended land use policies. One of the goals of the plan is to guide new development, at sufficient densities, into the Growth Areas, which include both developed land and undeveloped land, usually adjacent to existing development and able to be served by public infrastructure, including sewers, water, and road improvements.

The plan also recommends that development should be minimized in areas identified as Rural Resource Areas, which should retain a rural character. When development does occur in these areas it should be at lower densities, utilize land preservation guidelines and be aimed at preserving open space and natural resources.

Almost all of the nonresidential development in 2015 was constructed in Growth Areas, and most of that development occurred as infill or expansions within already developed areas, as shown in the table below. The few developments which did take place within the existing open space area were either municipal or recreational facilities.

SQUARE FOOTAGE BY GROWTH AND RURAL RESOURCE CATEGORIES		
Category	Sum of Square Footage	Percentage
Growth Areas - Developed Land	861,446	76%
Growth Areas - Developable Land	229,005	20%
Rural Resources Areas - Developed Land	0	0%
Rural Resources Areas - Developable Land	0	0%
Existing Preserved Open Space	45,581	4%
Conservation Opportunity Areas	0	0%

Glossary

Commercial
This includes all forms of retail development like banks, restaurants, clothing stores, hardware stores, and drug stores. It also includes personal services, hotels, mini-storage facilities, health spas, and fitness centers.

Industrial
This includes all forms of light and heavy manufacturing. It also includes warehouses and flex space.

Institutional
This includes churches, hospitals, schools, and universities. Some fee for service recreational uses like the YMCA are considered an institutional land use.

Institutional Elderly
This includes skilled nursing facilities with inpatient care, assisted living facilities, and senior centers. In a continuing care facility, independent living suites would not be considered nonresidential development, but any skilled nursing facility, doctor's office, community center, dining hall, or assisted living suite would.

Municipal
This includes any land development carried out by a municipal government. The construction of police stations, fire houses, municipal libraries, communication facilities, and warehouses on municipal property are considered a municipal land use.

Office
This includes all sizes of offices. It also includes research and development facilities.

Recreation
This includes facilities associated with outdoor recreational uses such as golf courses, camps, swim clubs, mini-golf courses, soccer clubs, etc. It also includes community centers within residential developments.

Square Feet
This is the total amount of net leasable floor space in a building, not necessarily the gross building area, which may include common areas or facilities.

Transportation
This includes train stations, airports, and other facilities associated with the movement of goods or people.

Utilities
This includes any land development involving the construction of public or private utilities. Utility construction incidental to nonresidential or residential construction is not included in this figure unless a separate building or other type of facility is constructed. Cell phone towers are also included in this land use.