



UPPER MERION TOWNSHIP
KING OF PRUSSIA • PENNSYLVANIA

Upper Merion Township

Act 209 Land Use Assumption Report

Introduction

Upper Merion Township is located in southeastern Pennsylvania, approximately 15 miles from center city Philadelphia. Over the last five decades, Upper Merion has developed into one of the most important ‘activity centers’ of the region. The township has approximately 28,395 residents, hosts over 50,000 jobs, and offers over 9.5 million square feet of office space.


Also located in Upper Merion are Valley Forge National Historic Park and the King of Prussia Mall, the nation’s largest shopping mall (ranked by square footage of retail space). The township is located at the junction of several major interstate and regional transportation routes. The primary interstate transportation routes in Upper Merion are the Schuylkill Expressway (I-76) and the Pennsylvania Turnpike (I-276), which give Upper Merion convenient access to Philadelphia and the New Jersey/New York area. A second major interstate route, though located just outside of Upper Merion, is the “Blue Route” (I-476), which provides access to the Philadelphia International Airport, Northern Delaware, and the Baltimore/Washington area via I-95. Regional transportation routes include U.S. Route 202 and U.S. 422, which provides access to locations throughout southeastern Pennsylvania. Transit service in Upper Merion is provided both on the local and regional level.

In 2010, the business community in Upper Merion formed the King of Prussia Business Improvement District (KOP BID). The KOP BID includes over 490 properties, totaling more than 1,800 acres, with an assessed value of over \$1.3 billion. The KOP BID provides services such as physical improvements, improving the land use and township ordinances and acting as an advocate for improved transit.

High speed rail from the Southeastern Pennsylvania Transportation Authority (SEPTA) provides transit service to and from Philadelphia, while 7 SEPTA bus routes service the main business areas of the township. A secondary transit system, operated by the Greater Valley Forge Transportation Management Authority (GVFTMA), provides local service to Upper Merion residents. Although railroads played a significant role in the early industrial development of the township, their role has diminished over the years. There is currently an effort being undertaken by the KOP BID to extend the Norristown High Speed Line up to the King of Prussia Mall and into the Business Park.

















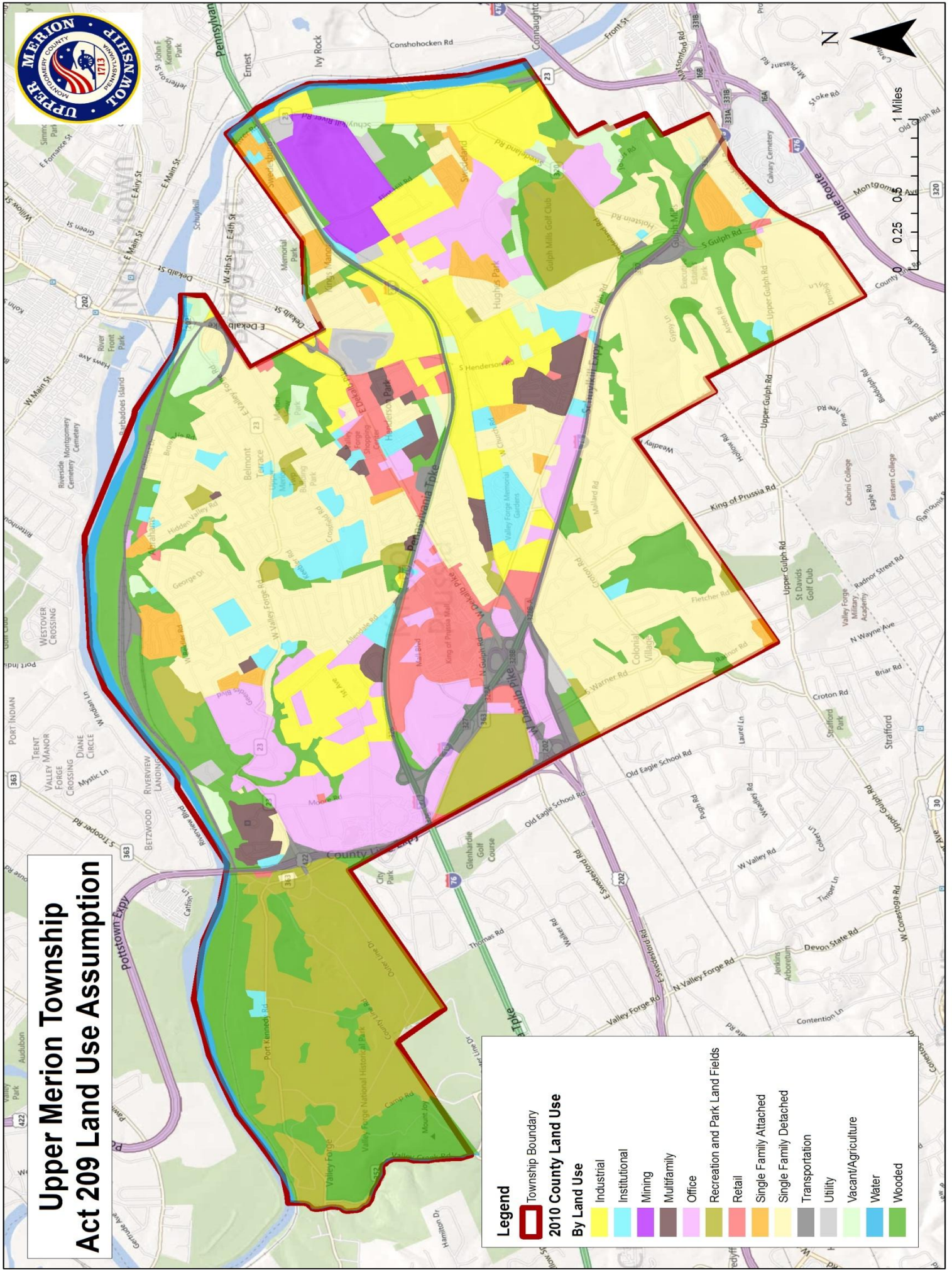
Upper Merion Township Act 209 Land Use Assumption

Legend
 Township Boundary

2010 County Land Use

By Land Use

-  Industrial
-  Institutional
-  Mining
-  Multifamily
-  Office
-  Recreation and Park Land Fields
-  Retail
-  Single Family Attached
-  Single Family Detached
-  Transportation
-  Utility
-  Vacant/Agriculture
-  Water
-  Wooded



Areas of Potential Development

Land uses in Upper Merion are atypical of many suburban townships, which are primarily residential. Over the years, Upper Merion has developed a land use pattern that more closely resembles an urban center. Upper Merion is 95% developed, but there are still some potential areas for new development, while there is a greater potential for redevelopment of some of the existing uses. With the efforts of the King of Prussia BID, new zoning ordinances and the potential for rail to be extended further into the township, higher density uses are a strong possibility.

King of Prussia Business Park



The King of Prussia Business Park is the largest area for potential redevelopment. Comprising of 675 acres and 109 individual parcels. The area is bounded by US 422 on the west, I-276 on the south, Allendale Road on the east and US Route 23 on the north.

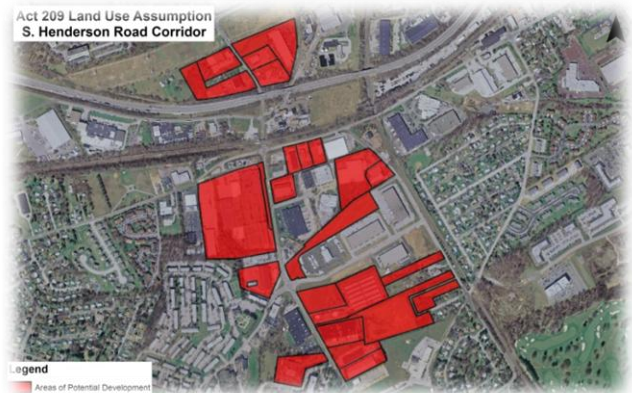
The area was originally developed in the late 1950's and 1960's as the King of Prussia

Industrial Park for manufacturing and warehousing. The area would eventually evolve to include office and Research & Development uses. The average parcel size is 6.89 acres, with the average property assessment being \$758,348. The business park is serviced by three, four lane surface roads including First Avenue, Allendale Road and Moore Road. The park is also serviced by the SEPTA 99 and 125 bus routes. There is currently an effort to extend the Norristown High Speed Line into the business park, at a location that is still to be determined. This increases the potential for higher density and mixed used developments in the business park.

A majority of the above parcels are zoned SM and are currently used for warehousing and older industrial uses. As the dynamic of the office park continues to shift, it is possible that these parcels will be redeveloped into office and mixed use retail/residential.

South Henderson Road Corridor

The South Henderson Road Corridor is located along Henderson Road, between the Pennsylvania Turnpike and South Gulph Road. Existing land uses include mostly industrial, with a small amount of retail/services. With the expanding of Henderson Road and the addition of slip-ramps from I-76, it is expected that some of the primary industrial uses of the area may be redeveloped to include retail, office and service use. The parcels highlighted in Red in Figure 1-2 display where areas of redevelopment are expected over the next 10 years.



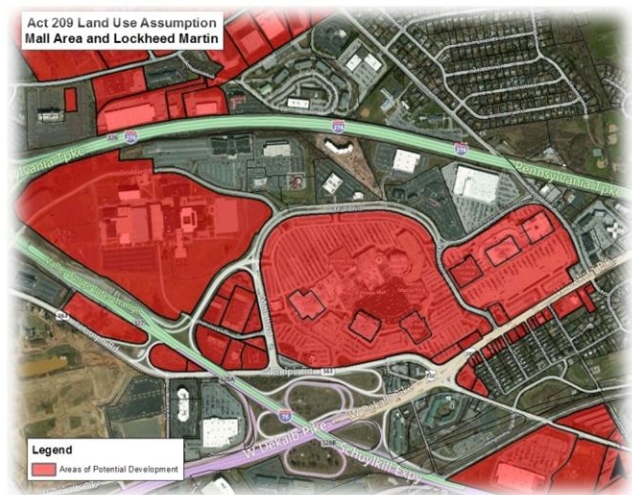
South Gulph Road Corridor

The South Gulph Road Corridor extends along South Gulph Road from Route 202, southward to Henderson Road. This area has seen redevelopment from primarily residential use, to some higher density office use. This trend is expected to continue over the next 10 years. It is expected that many of the existing residential parcels will be combined to create larger lots. This would increase the potential for office and residential developments.



KOP Mall and Lockheed Martin Area

The potential extension of the Norristown High Speed Line continues to make the King of Prussia Mall area a viable candidate for redevelopment. This potential also includes the Lockheed Martin property, immediately to the northwest of the mall site. This area has high accessibility from 202, 76, 422, and the Pennsylvania Turn Pike, as well as many SEPTA bus routes. The potential exists for higher density office, retail and mixed use developments.



Summary and Results

In order to prepare a forecast of potential land development, the township as a whole was evaluated to better understand where potential areas for development exist. Upper Merion Township is over 95% developed, with little vacant space left for development. The real opportunity lies in re-development of existing parcels.

The main areas of interest include the King of Prussia Business Park, the South Gulph Road Corridor, the South Henderson Road Corridor and the King of Prussia Mall area (including the Lockheed Martin Parcel). All of these areas include aging developments which could possibly see major redevelopment over a 10 year time span. It is also possible that a majority of the industrial uses within the township will transform into more intensive uses, such as office, retail and residential developments.

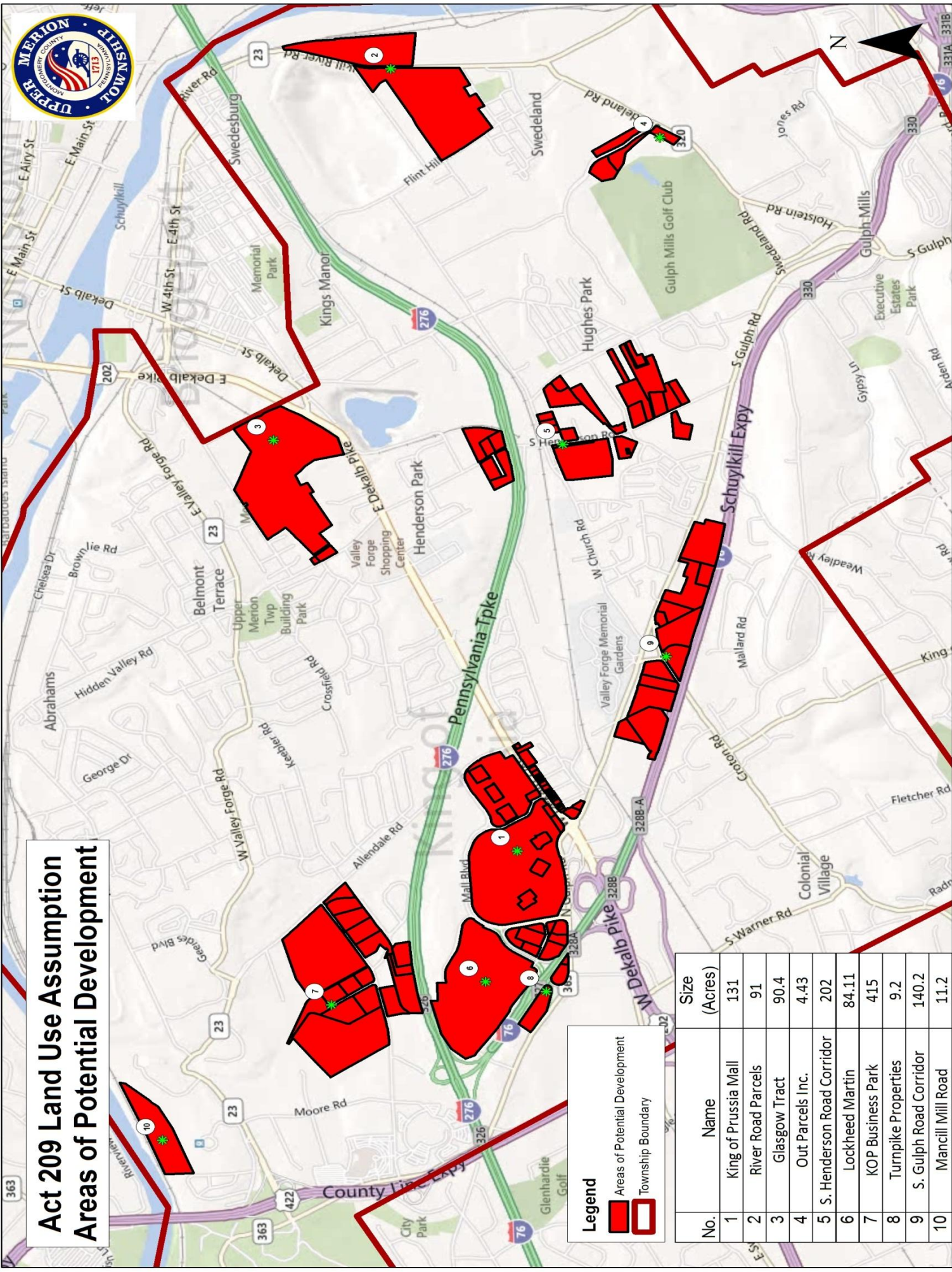
Creating a forecast of potential development is a difficult task, especially with the unknowns that exist with the current economy and real-estate market. For the sake of this study, calculations for potential development were taken from the Upper Merion Horizons study, which conducted a yield analysis for parcels based on their current zoning districts. Calculating the yield for each district was completed to determine the potential intensity of development per acre. These calculations were then used to analyze the vacant developable and re-developable parcels to determine the minimum and maximum potential development for each parcel.

The yield analysis calculations used the following assumptions. At least 20% of the site would remain open space, with building and parking not taking up more than 80% of an individual site. It also assumed an average parking requirement and a minimum footprint of 5,000 SF. Calculations created a minimum and maximum yield, with the minimum being based on surface parking and the maximum based on decked parking.

Zone	Building Coverage	Minimum Yield/ Acre	Maximum Yield/ Acre
AR	25%	28,000	38,115
AR-1	No Limit	28,000	99,000
CO	25%	23,400	38,115
C-1	No Limit	22,000	22,000
C-2	No Limit	28,000	99,000
C-3	No Limit	28,000	99,000
SC	No Limit	22,000	86,900
SM	50%	25,180	65,000
SM-1	50%	25,180	65,000
LI	75%	28,000	92,810
HI	75%	28,000	123,810



Act 209 Land Use Assumption Areas of Potential Development



Legend

- Areas of Potential Development
- Township Boundary

No.	Name	Size (Acres)
1	King of Prussia Mall	131
2	River Road Parcels	91
3	Glasgow Tract	90.4
4	Out Parcels Inc.	4.43
5	S. Henderson Road Corridor	202
6	Lockheed Martin	84.11
7	KOP Business Park	415
8	Turnpike Properties	9.2
9	S. Gulph Road Corridor	140.2
10	Mancill Mill Road	11.2

The acreage of a parcel was multiplied by the proposed building coverage limits and then again multiplied by the proposed minimum/maximum yields to provide an estimate of new development for the property. Since most of the anticipated development in the township over the 10 year forecast period is expected to be redevelopment, the calculations subtracted the existing commercial area of parcels, to only show the addition of new development.

Development Area	Potential Yield (SF)
KOP Business Park	500,000
KOP Mall Area	410,500
South Gulph Road Corridor	200,000
South Henderson Road Corridor	400,000

The same calculations were applied to the additional parcels which were designated as potential areas of development in the map above. The Act 209 Committee then evaluated the potential yields and made necessary adjustments to properly reflect the current economy and land development potential in the township. Members of the Act 209 committee include both residents and representatives from the business community with backgrounds in business, land development and engineering.

Using the above methodology, it is predicted that if all of the identified parcels were to develop into higher density uses, the township could see **2,424,500 SF** of new commercial development and the construction of **892 new residential units**.

Upper Merion Township, while already heavily developed, continues to see new commercial projects and residential construction. It is expected with the formation of the Business Improvement District, new zoning regulations and the possible extension of rail service into the heart of the township that this trend will continue for the next 10 years, as well as decades to come. The township is ripe for potential mixed use, higher density development, which is expected to make up a large portion of the forecasted development.

No.	Name	Size (Acres)	Proposed Commercial Development (SF)	Proposed Residential Development (SF)	Type of Development
1	King of Prussia Mall	131	410,500	**	Retail
2	River Road Parcels	91	600,000	**	Office
3	Glasgow Tract	90.4	**	379 Residential Units	Residential
4	Out Parcels Inc.	4.43	50,000	**	Office
5	S. Henderson Road Corridor	202	400,000	**	Retail
6	Lockheed Martin	84.11	250,000	**	Office
7	KOP Business Park	415	500,000	**	Office
8	Turnpike Properties	9.2	14,000	**	Retail
9	S. Gulph Road Corridor	140.2	200,000	**	Office
10	Mancill Mill Road	11.2	**	513 Residential Units	Residential
	Total:	1178.54	2,424,500	892 New Residences	**