

# BUILD **D** BUILD LEHIGH VALLEY LV

May 2015

Lehigh Valley Annual Development Report



## Lehigh Valley Planning Commission

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## I. INTRODUCTION

The Lehigh Valley Planning Commission (LVPC) reviews subdivision and land development plans relative to the policies of the *Comprehensive Plan The Lehigh Valley ... 2030*. Any plan or proposal that meets the definition of “land development” within the Municipalities Planning Code (MPC) must go to the county planning agency for review. Per Section 107 of the MPC, a land development includes the following:

- (1) The improvement of one lot or two or more contiguous lots, tracts or parcels of land for any purpose involving:
  - (i) a group of two or more residential or non-residential buildings, whether proposed initially or cumulatively, or a single non-residential building on a lot or lots regardless of the number of occupants or tenure; or
  - (ii) the division or allocation of land or space, whether initially or cumulatively, between or among two or more existing or prospective occupants by means of, or for the purpose of streets, common areas, leaseholds, condominiums, building groups or other features.
- (2) A subdivision of land.

Section 503(1.1) of the MPC details exceptions to this definition of land development, including accessory buildings and conversions of single family dwellings to three or fewer residential apartments. However, these exceptions are few, and the overwhelming majority of subdivision and land development activity must reach the county planning agencies for review. Whenever these actions take place within Lehigh or Northampton counties, the plan must come before the Lehigh Valley Planning Commission.

Through the review process, the LVPC tracks and maintains extensive data on subdivision and building activity within the two counties. Since 1972, the LVPC has published the annual development report to provide a general overview of activity during the year.

In 2014, 384 plans reached the LVPC. The year saw slightly lighter overall development activity over the previous year. However, the number of total approved lots within those plans was up significantly over the previous year, suggesting that, despite the lower number of plans, many of these individual plans had a higher number of subdivisions taking place within them, resulting in the creation and approval of more lots.

Unlike the previous decade, where single family homes were being proposed in great numbers, the recent trend saw more apartments and assisted living

## 2014 PLAN SUBMISSIONS

Stage	Lehigh County	Northampton County	Lehigh Valley
Sketch	7	0	7
Preliminary	103	101	204
Final	82	91	173
<b>Total</b>	<b>192</b>	<b>192</b>	<b>384</b>

units proposed by developers up through 2013. However, in 2014, that trend shifted somewhat: the percentage share of single family lots went from 12% of the Lehigh Valley’s total proposed lots in 2013 up to 26% in 2014, suggesting a rebound in interest for single family detached housing. While the demand for new single family homes, townhomes and duplex “twin” units remains weak in comparison to previous building “booms”, the continued low mortgage rates and a lower unemployment rate have allowed the demand for single family detached residential, the most common housing type nationwide, to regain considerable footing. Meanwhile, the rental market appears highly favorable, with the demand for apartments continuing to surge.

While non-residential development dropped sharply from 2013 (40%), with a nearly 41% decrease in square footage approved by local municipalities for warehouses, office space and retail development, the 2014 count was still higher than any figure in the non-residential sector since 2008, suggesting a general trend toward recovery from the recession-era lows.

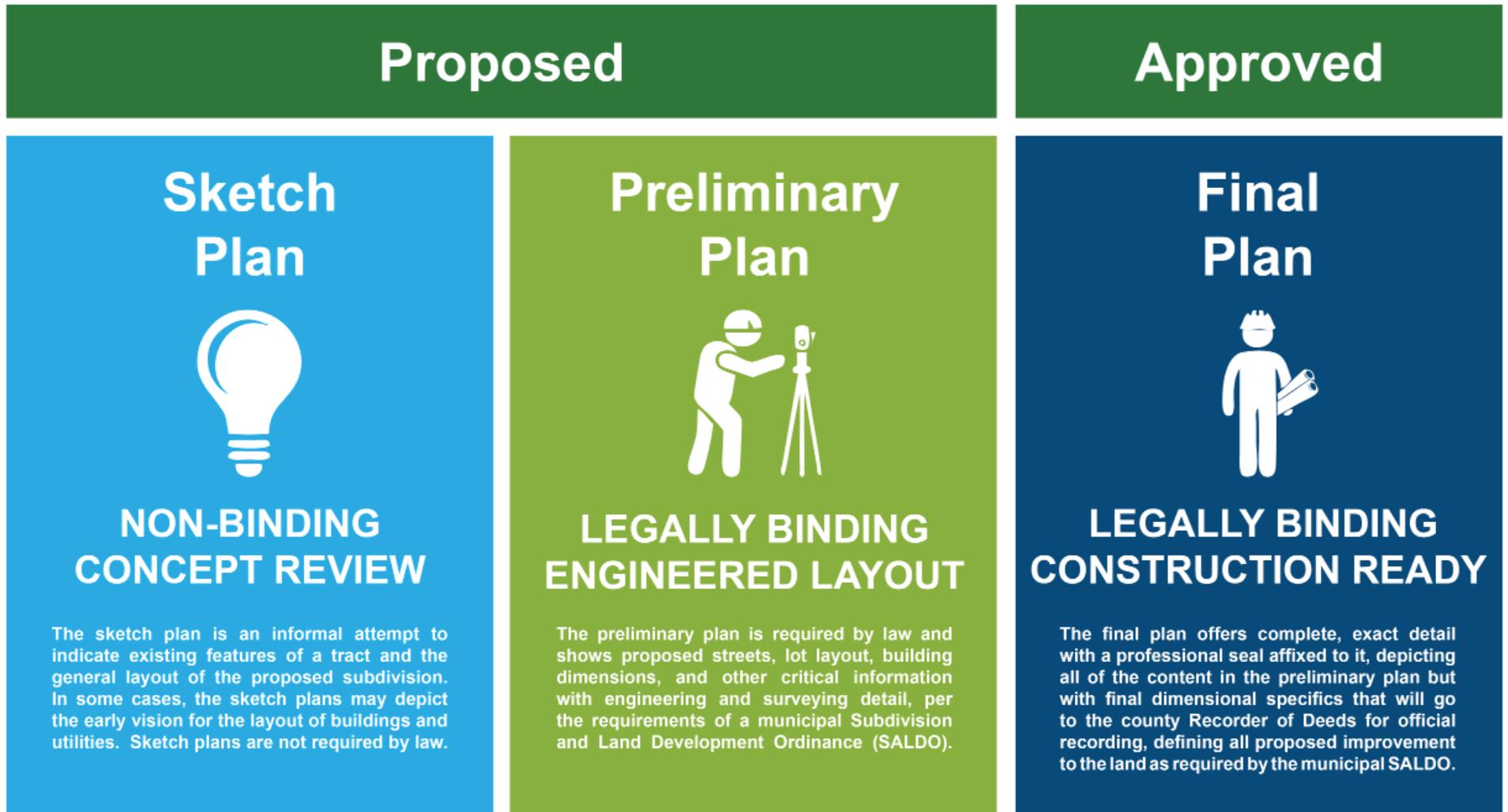
The following chapters will explore building activity, first in terms of plans, then in terms of the lots created through those plans. It will separate residential from non-residential activity, showing differences in development trends between these two primary classifications. Through this broad survey of subdivision and land development data, the report will conclude with what the LVPC identifies as the most critical observations, all drawn from 2014 activity, and how it compares to preceding years.

## II. PLAN ACTIVITY

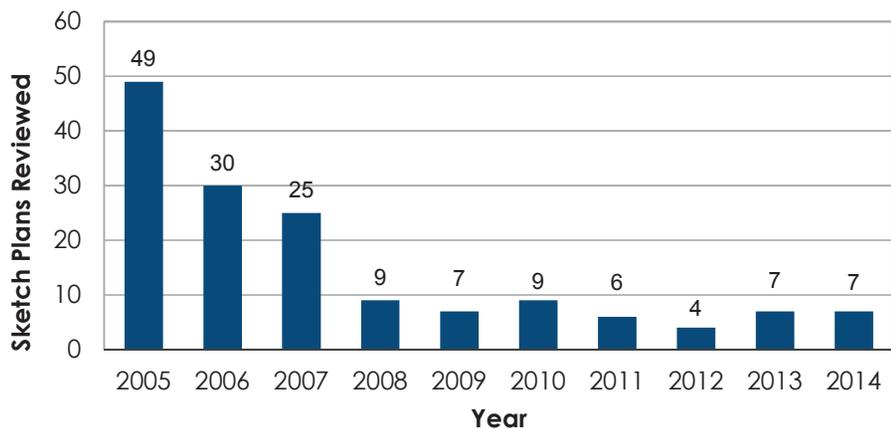
In 2014, 384 subdivision/land development plans were submitted to the LVPC, a decrease of 10.3% from 428 plans in 2013. They come in three categories, based on how far along they are in the overall process: sketch, preliminary and final. The *sketch plan* is an informal attempt to indicate existing features of a tract and the general layout of the proposed subdivision. In some cases, sketch plans may depict the early vision for the layout of buildings and utilities.

Sketch plans are not required by law. The *preliminary plan* is required by law and shows proposed streets, lot layout, building dimensions and other critical information with engineering and surveying detail, per the requirements of a municipal Subdivision and Land Development Ordinance (SALDO). The *final plan* offers complete, exact detail with a professional seal affixed to it, depict-

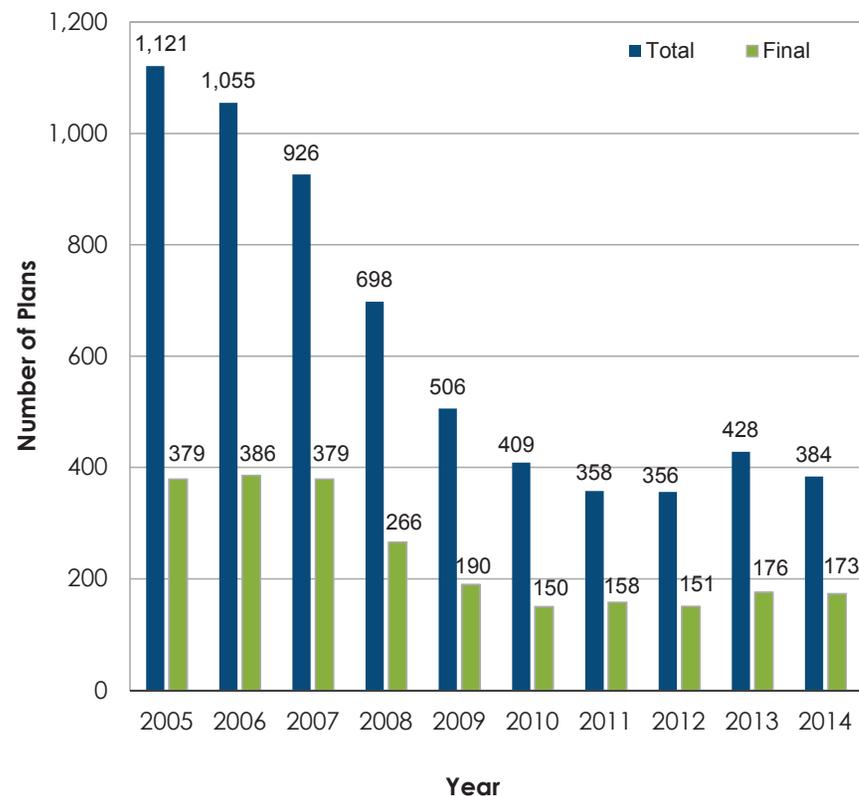
ing all of the content in the preliminary plan but with final dimensional specifics that will go to the county Recorder of Deeds for official recording, defining all proposed improvement to the land as required by the municipal SALDO. On smaller proposals, a preliminary plan may double as the final plan.



When the LVPC receives a new plan, it enters the proposal in a database as one of the three categories listed above. Sketch plan activity continued at the same rate as in 2013; the LVPC reviewed seven sketch plans during each year. The sketch plan process allows the LVPC to evaluate a proposed subdivision or development concept against the *County Comprehensive Plan* earlier in the development process than preliminary plan submission allows. While a relatively small number of sketch plans, it is noteworthy that this remains the highest number of sketch plans submitted for review since 2010. Prior to the economic downturn, the LVPC was often reviewing 25 or more sketch plans in a given year.

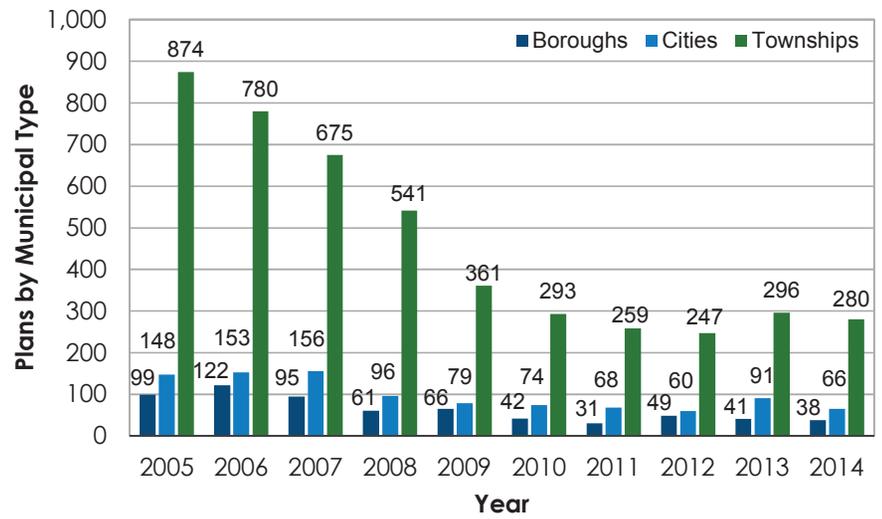


When comparing final plans in isolation with the overall total number of plans reviewed in one year, where final plans are a subset within the total plans, it becomes clear that approximately 45% of plans (173 out of the 384) submitted in 2014 were final. In comparison, this percentage of the total is somewhat larger than 2013 levels (41%). Although both 2013 and 2014 saw more plans come to the LVPC than 2011 and 2012, the total number of plans reaching the LVPC is still at less than half of the 2005 and 2006 peak.



Examining the volume of plans by municipality type provides a good indication of where development is occurring in the Lehigh Valley. Based on the distribution of plans across the Lehigh Valley in 2014, Allentown, the largest city in the region, submitted the highest number of plans (27), though Bethlehem, with city limits that stretch across both counties, submitted almost as many (24). Despite these relatively high numbers for the largest cities, plans submitted in the townships continue to outnumber those submitted in the boroughs and three cities significantly.



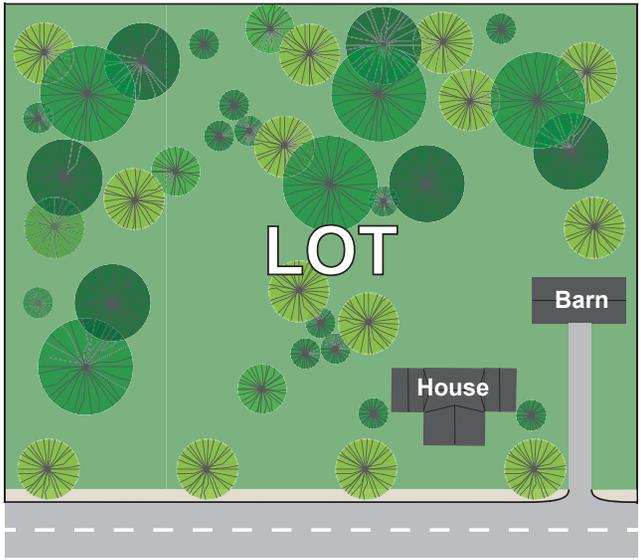


### III. TOTAL LOTS

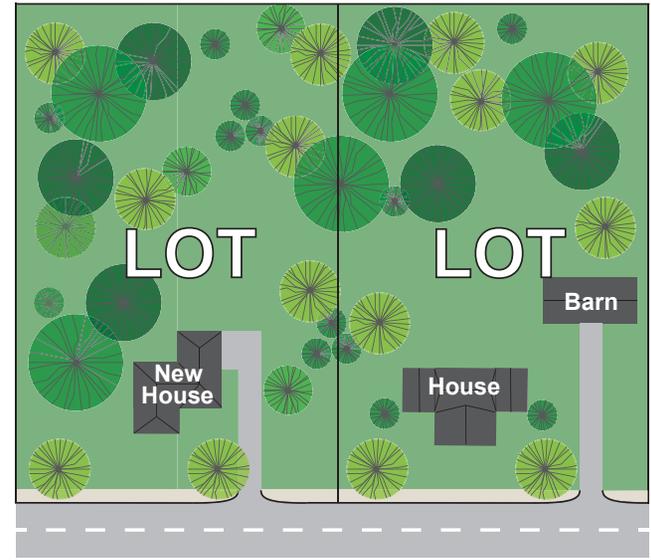
The LVPC’s count of lots includes numbers embedded in the recordkeeping for plans. For the purpose of this report, the term *lot* may refer to any of the following: a new lot that is proposed in a sketch or preliminary plan or approved in a final plan; a lot on which a lot line adjustment is proposed in a sketch or preliminary plan; or a new dwelling unit that is proposed in a sketch or preliminary plan or approved in a final plan regardless of whether or not it will be placed on its own individual lot/parcel (e.g., condominium and apartment units). The six diagrams help to clarify the action that takes place during a simple subdivision, a lot line adjustment and a lot consolidation—all of which depend on their respective plans to increase, decrease or change the dimensions to lots.

Each type of plan will have a certain number of lots associated with it. If a plan proposes nothing more than a building or parking lot expansion on an existing, developed lot, that number will be zero. For purposes of this report, lots associated with sketch or preliminary plans are classified as *proposed lots*. Lots associated with final plans are classified as *approved lots*. Finally, *total lots* represent the sum of proposed and approved lots. The LVPC reviewed 3,184 total lots during 2014, a decrease of 16.9% from 2013 totals (3,833 total lots). The 2013 and 2014 numbers are less than one-third of the lots that reached the LVPC in 2005 and 2006, prior to the downturn, but they are considerably higher than the lots received from 2009 to 2012.

#### SIMPLE SUBDIVISION

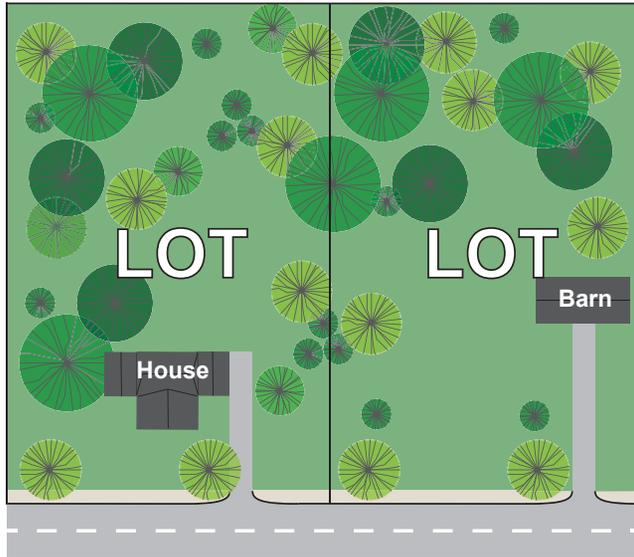


ORIGINAL LOT

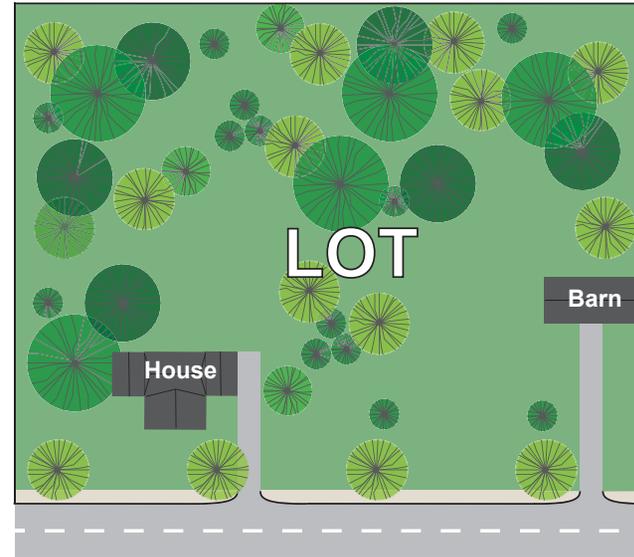


SUBDIVIDED LOT

**LOT CONSOLIDATION**

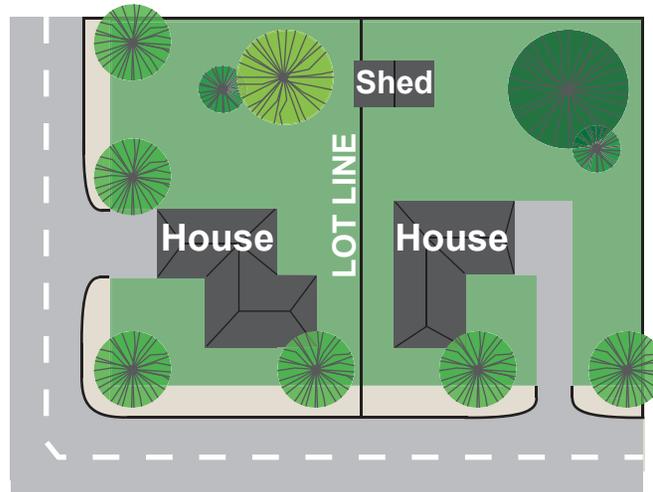


**TWO LOTS**

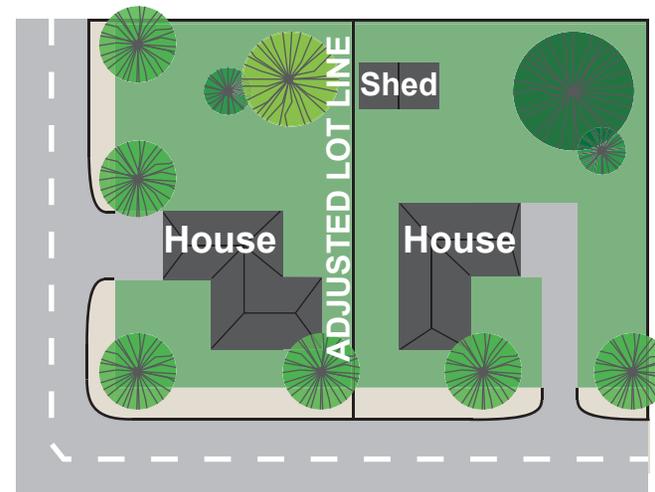


**CONSOLIDATED LOT**

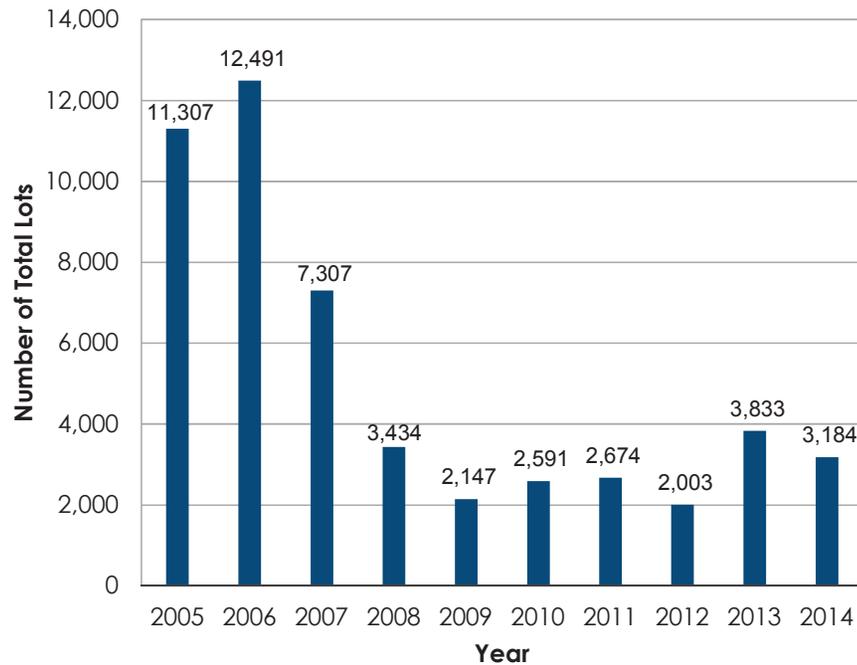
**LOT LINE ADJUSTMENT**



**SHED BUILT OVER LOT LINE**



**LOT LINE ADJUSTED SO SHED  
CONTAINED ON ONE PROPERTY**



Based on the distribution of total lots across the Lehigh Valley in 2014, the townships often display the highest level of activity, particularly South Whitehall in Lehigh County and Forks in Northampton County. Generally, the number of total lots, coupled with residential building permits (covered in Section XI), are indicators of potential residential growth and a reading of developers' confidence in the market.

#### IV. PROPOSED LOTS

Of the Lehigh Valley's 3,184 total lots, 1,948 (61.2%) were proposed in sketch and preliminary plans. This percentage of proposed lots is considerably lower than 2013 levels, when 74.4% of the total lots were proposed. In keeping with past trends, the majority (1,784 out of 1,948, or 91.6%) of the proposed lots are for residential uses. Of the proposed lots, 58% are for apartments, 2% for assisted living and 24% for single family houses. Apartments have been the number one housing type proposed in the region since 2008. Meanwhile, assisted living proposed lots dropped precipitously, from 15% of the total in 2013 to only 2% in 2014.

#### PROPOSED LOTS BY DEVELOPMENT TYPE

	Lehigh County		Northampton County		Lehigh Valley	
	No.	%	No.	%	No.	%
<b>Total Residential</b>	<b>1,105</b>	<b>92.2%</b>	<b>679</b>	<b>90.5%</b>	<b>1,784</b>	<b>91.6%</b>
Single Family	386	32.2%	82	10.9%	468	24.0%
Twins	4	0.3%	20	2.7%	24	1.2%
Townhouses	34	2.8%	66	8.8%	100	5.1%
Apartments	658	54.9%	479	63.9%	1,137	58.4%
Condominiums	23	1.9%	0	0.0%	23	1.2%
Mobile Home Parks	0	0.0%	0	0.0%	0	0.0%
Assisted Living	0	0.0%	32	4.3%	32	1.6%
Planned Residential Development	0	0.0%	0	0.0%	0	0.0%
<b>Total Non-Residential</b>	<b>93</b>	<b>7.8%</b>	<b>71</b>	<b>9.5%</b>	<b>164</b>	<b>8.4%</b>
Industrial/Warehousing	6	0.5%	9	1.2%	15	0.8%
Commercial (includes Retail)	10	0.8%	16	2.1%	26	1.3%
Other (Transportation, Recreation, Public/Quasi Public, Office, Agriculture)	7	0.6%	5	0.7%	12	0.6%
Non-Development	70	5.8%	41	5.5%	111	5.7%
<b>Total</b>	<b>1,198</b>	<b>100.0%</b>	<b>750</b>	<b>100.0%</b>	<b>1,948</b>	<b>100.0%</b>



The primary use for these lots can vary, depending on the municipality. The majority of the proposed lots in Bethlehem and South Whitehall Township are for apartments, though in Upper Milford Township, the majority are single family detached homes.

In both counties, the top three most active municipalities comprise over 65% of the total proposed lots, based on a “top ten” ranking of municipalities by county.

**MUNICIPAL RANKING - PROPOSED LOTS**

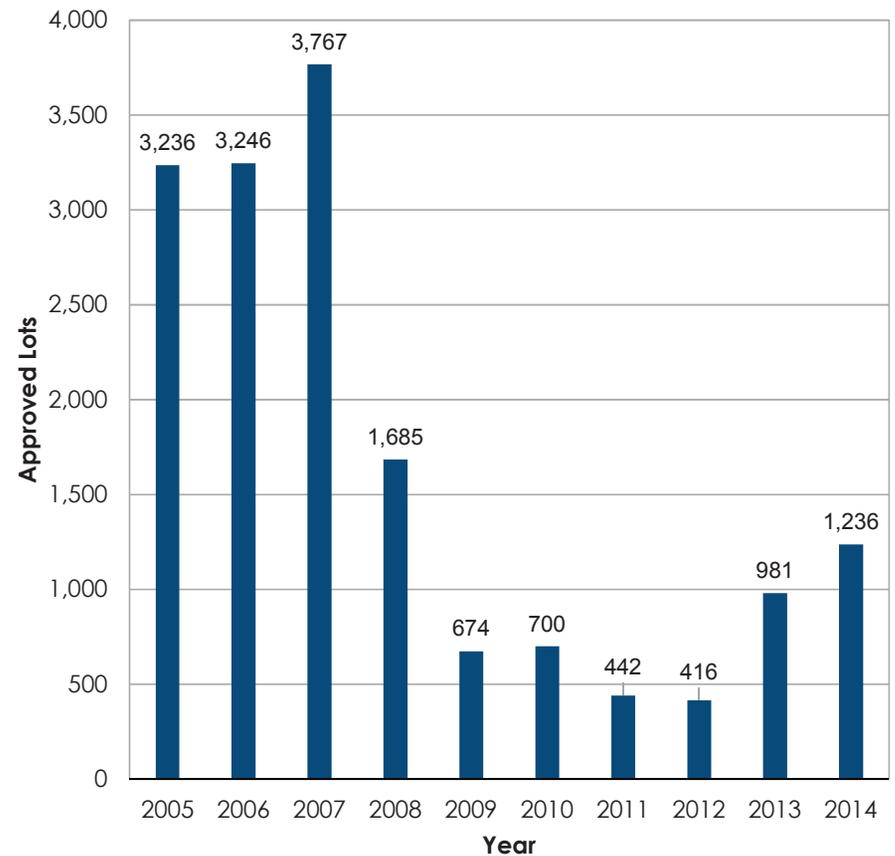
<b>Lehigh County</b>			
		<b>Lots</b>	<b>% of total*</b>
1	South Whitehall Township	453	37.8%
2	Upper Milford Township	223	18.6%
3	Lower Macungie Township	216	18.0%
4	Upper Saucon Township	102	8.5%
5	Allentown City	68	5.7%
6	Whitehall Township	54	4.5%
7	Coopersburg Borough	24	2.0%
8	Washington Township (LC)	10	0.8%
9	Lynn Township	8	0.7%
10	North Whitehall Township	8	0.7%

<b>Northampton County</b>			
		<b>Lots</b>	<b>% of total*</b>
1	Bethlehem City (NC)	236	27.9%
2	Easton City	172	20.4%
3	Wind Gap Borough	170	20.1%
4	Forks Township	58	6.9%
5	Lower Saucon Township	13	1.5%
6	Moore Township	13	1.5%
7	Nazareth Borough	10	1.2%
8	Washington Township (NC)	9	1.1%
9	East Bangor Borough	8	0.9%
10	Palmer Township	7	0.8%

\*Percentages show total for all lots in the county, not just from among the top ten municipalities listed here.

**V. APPROVED LOTS**

In 2014, 1,236 lots, or 38.8% of the Lehigh Valley’s total lots, received final approval from the municipalities. This represents a substantial 25.9% increase from the previous year’s 981 approved lots. Though still only about one-third of the number approved in 2007 before the downturn, this figure is still nearly three times greater than in 2012, the low point for approving lots. The majority of the approved lots in the Lehigh Valley (1,117 of 1,236, or 90.4%) were for residential uses. Of the total approved lots, 17% were for single family houses and 53% were for apartments. Less than 10% of approved lots went to non-residential uses, the majority of which were “non-development”, meaning that the subdivision process created new lots but involved no new proposed construction.





## APPROVED LOTS BY DEVELOPMENT TYPE

	Lehigh County		Northampton County		Lehigh Valley	
	No.	%	No.	%	No.	%
<b>Total Residential</b>	<b>255</b>	<b>82.3%</b>	<b>862</b>	<b>93.1%</b>	<b>1,117</b>	<b>90.4%</b>
Single Family	47	15.2%	168	18.1%	215	17.4%
Twins	0	0.0%	54	5.8%	54	4.4%
Townhouses	0	0.0%	8	0.9%	8	0.6%
Apartments	168	54.2%	481	51.9%	649	52.5%
Condominiums	0	0.0%	0	0.0%	0	0.0%
Mobile Home Parks	0	0.0%	0	0.0%	0	0.0%
Assisted Living	40	12.9%	151	16.3%	191	15.5%
Planned Residential Development	0	0.0%	0	0.0%	0	0.0%
<b>Total Non-Residential</b>	<b>55</b>	<b>17.7%</b>	<b>64</b>	<b>6.9%</b>	<b>119</b>	<b>9.6%</b>
Industrial/Warehousing	4	1.3%	9	1.0%	13	1.1%
Commercial (includes Retail)	7	2.3%	4	0.4%	11	0.9%
Other (Transportation, Recreation, Public/Quasi Public, Office, Agriculture)	2	0.6%	6	0.6%	8	0.6%
Non-Development	42	13.5%	45	4.9%	87	7.0%
<b>Total</b>	<b>310</b>	<b>100.0%</b>	<b>926</b>	<b>100.0%</b>	<b>1,236</b>	<b>100.0%</b>

As shown on the municipal rankings, the City of Allentown represented more than half of all approved lots in Lehigh County, while in Northampton County, three municipalities captured 60% of the approved lots: Palmer Township, the City of Easton and Lower Nazareth Township. Please note that a single development plan can impact the rankings significantly from one year to the next, both in terms of municipal activity and the type of housing involved.

For example, 85 of the 89 approved lots in Forks Township come from a single assisted living plan (*Country Meadows*), and 306 of the 315 lots for Palmer Township were apartments from one subdivision initially proposed in 2012 (*Palmer View*). Meanwhile, 40 of the 54 approved lots for twins throughout the Lehigh Valley come from a single proposal in Allen Township (*Quarry Hill Estates*), which comprised all but one of that township's approved lots for 2014, and that final lot was a single family detached unit also associated with Quarry Hill Estates.

## MUNICIPAL RANKING - APPROVED LOTS

Lehigh County	Lots	% of total		Northampton County	Lots	% of total
Allentown City	177	57.1%	1	Palmer Township	315	34.0%
Salisbury Township	41	13.2%	2	Easton City	140	15.1%
Lower Macungie Township	30	9.7%	3	Lower Nazareth Township	103	11.1%
Weisenberg Township	10	3.2%	4	Forks Township	89	9.6%
Lynn Township	6	1.9%	5	Bethlehem Township	67	7.2%
Upper Saucon Township	6	1.9%	6	Bethlehem City (NC)	52	5.6%
Whitehall Township	6	1.9%	7	Allen Township	41	4.4%
North Whitehall Township	5	1.6%	8	Upper Nazareth Township	41	4.4%
Upper Macungie Township	5	1.6%	9	Bushkill Township	17	1.8%
Washington Township (LC)	5	1.6%	10	Moore Township	12	1.3%



For nearly three decades, development within the Lehigh Valley has concentrated on the rural and suburban townships, where development is relatively dispersed. The predominant character of this development is low density single family dwellings. However, recent trends show less demand for that type of development, as evidenced by the relatively small share of approved lots in 2014 for single family houses.

An aggregation of approved lots by municipality from 2005-2014 is a good general indicator of where development activity has been most intense. The most active municipalities were Upper Macungie Township, Lower Macungie Township, the City of Allentown and Forks Township, all of which had over 1,000 approved lots during this time period.

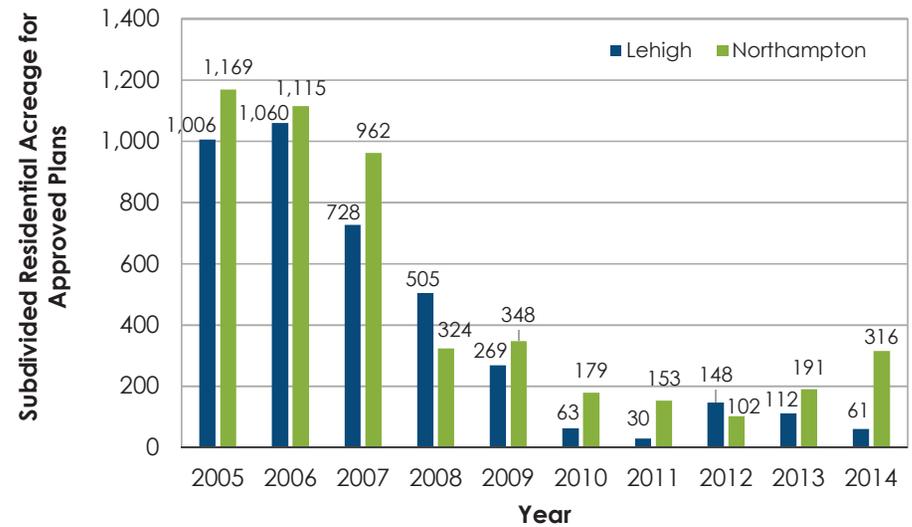
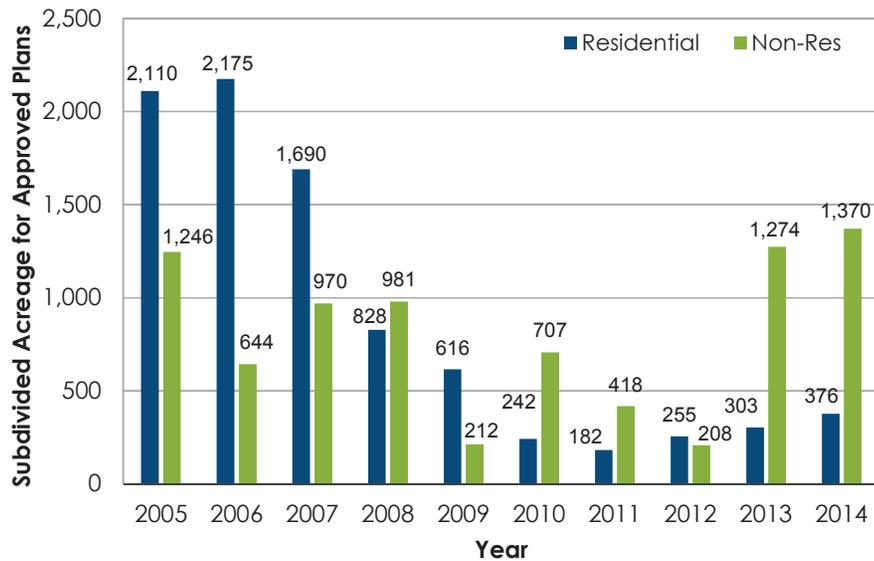
**VI. ACREAGE WITHIN SUBDIVISIONS OR LAND DEVELOPMENTS**

The sum total of residential and non-residential lands approved by Lehigh Valley municipalities for subdivision or land development during 2014 would consume nearly 1,746 acres, or 2.73 square miles.

The land subdivided for non-residential development is a mixture of “brown-field” and “greenfield” development, with brownfield redevelopment in the City of Bethlehem through additional phases of the Lehigh Valley Industrial Park 7 project, and greenfield development in Lower Nazareth Township (First Park 33), Palmer Township (Chrin Commerce Centre) and Upper Macungie Township (West Park Lot #8). The total number of 1,746 represents a 10.7% increase from 2013 total acreage for residential and non-residential development. A sustained lag exists in the demand for new residential development, when compared to the 2005 to 2007 levels. In almost every year, Northampton County has comprised the majority of developed residential acreage.

**VII. SEWER AND WATER SYSTEMS**

In both counties, the majority of lots will use community (public) water and sewer, though close to 15% of approved lots in Northampton County will use on-lot (septic) systems. Central water or sewer systems, in which a system either distributes drinking water or processes wastewater to two or more lots in a distinct service area limited to particular land developments, rarely appear in approved lots in the Lehigh Valley; none featured them in 2014.





The data from the sewer and water approvals are positive indicators since most approved lots in the Lehigh Valley are served by public utilities and are in areas recommended for urban development by the *County Comprehensive Plan*, where existing infrastructure can support it. The *County Comprehensive*

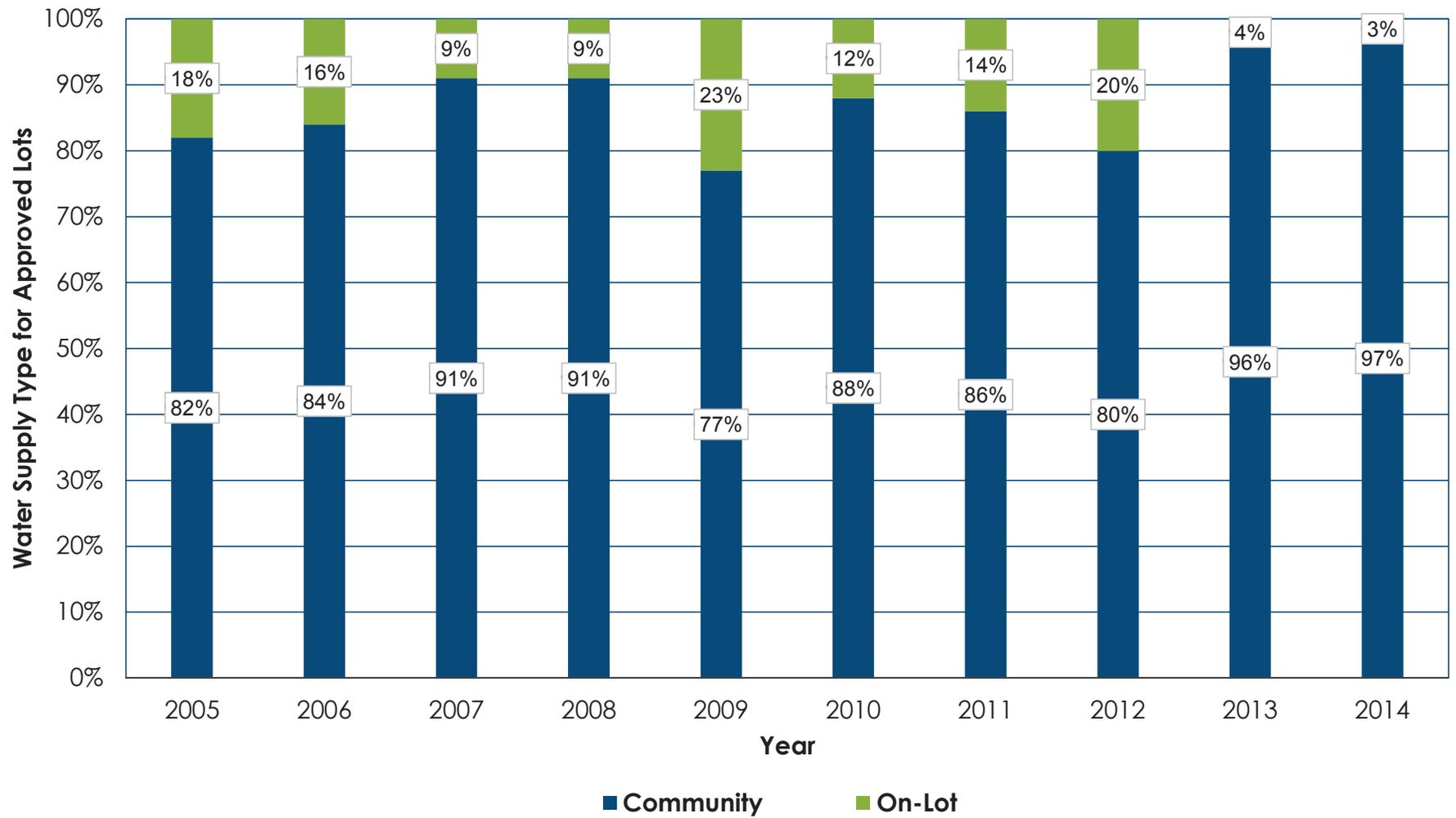
*Plan* recommends new growth to locate in these areas as opposed to the rural and farmland areas of the Lehigh Valley, where the provision of public water/sewer is much more costly.

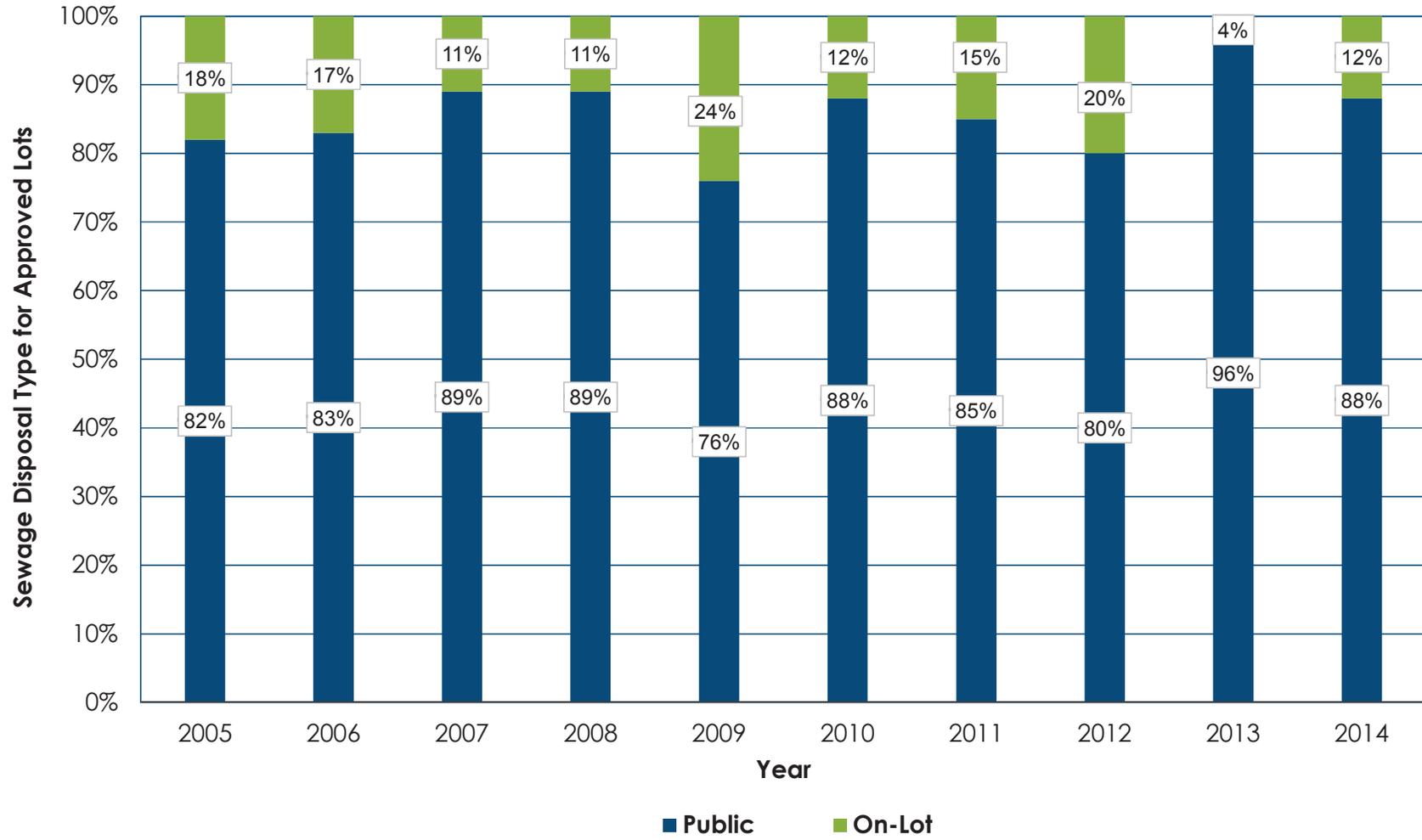
#### TYPE OF WATER SUPPLY- APPROVED LOTS 2014

	Community		Central		On-Lot		Total
	No.	%	No.	%	No.	%	
Lehigh	253	94.4%	0	0%	15	5.6%	268
Northampton	860	97.8%	0	0%	19	2.2%	879
Lehigh Valley	1,113	97.0%	0	0%	34	3.0%	1,147

#### TYPE OF SEWAGE DISPOSAL- APPROVED LOTS 2014

	Public		Central		On-Lot		Total
	No.	%	No.	%	No.	%	
Lehigh	256	95.5%	0	0%	12	4.5%	268
Northampton	750	85.3%	0	0%	129	14.7%	879
Lehigh Valley	1,006	87.7%	0	0%	141	12.3%	1,147



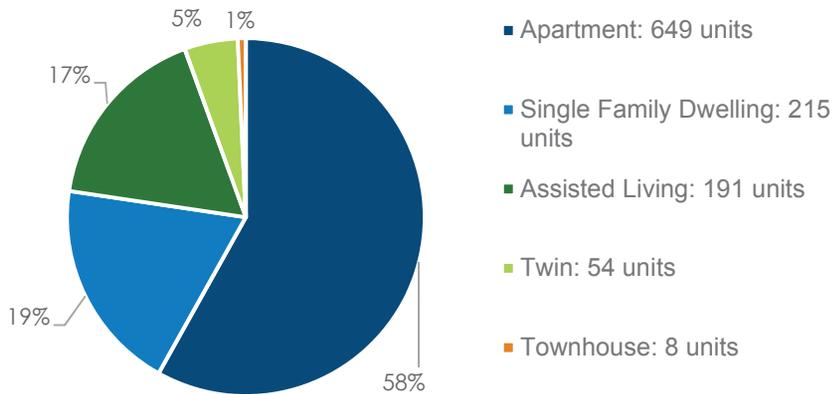


## VIII. RESIDENTIAL DEVELOPMENT

In comparison to the years before the economic downturn, approved residential lots did not cover as great a variety of housing types. In 2014, apartments comprised over 58% of the total approved residential units. The percentage for assisted living was nearly as high as single family dwellings. No condominiums, planned residential developments or mobile homes were approved across the Valley in 2014.

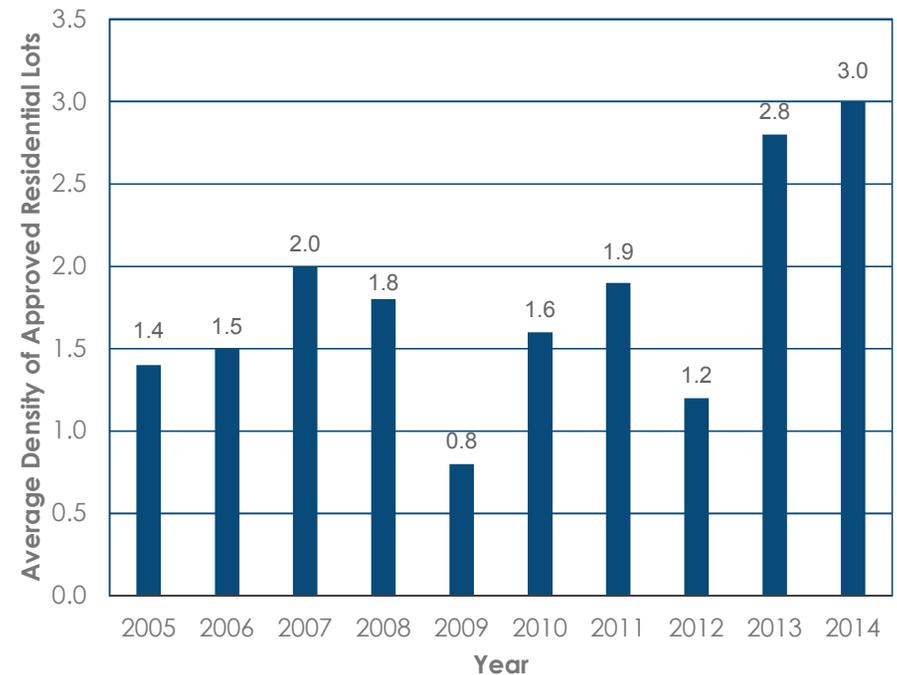
The LVPC quantifies the lots of residential development through units. For most owner occupied, single family detached dwellings, one lot will equate to one unit. For a multi-family apartment building, however, one lot can equate to a great number of units, since all the dwelling units still fall under a unified ownership.

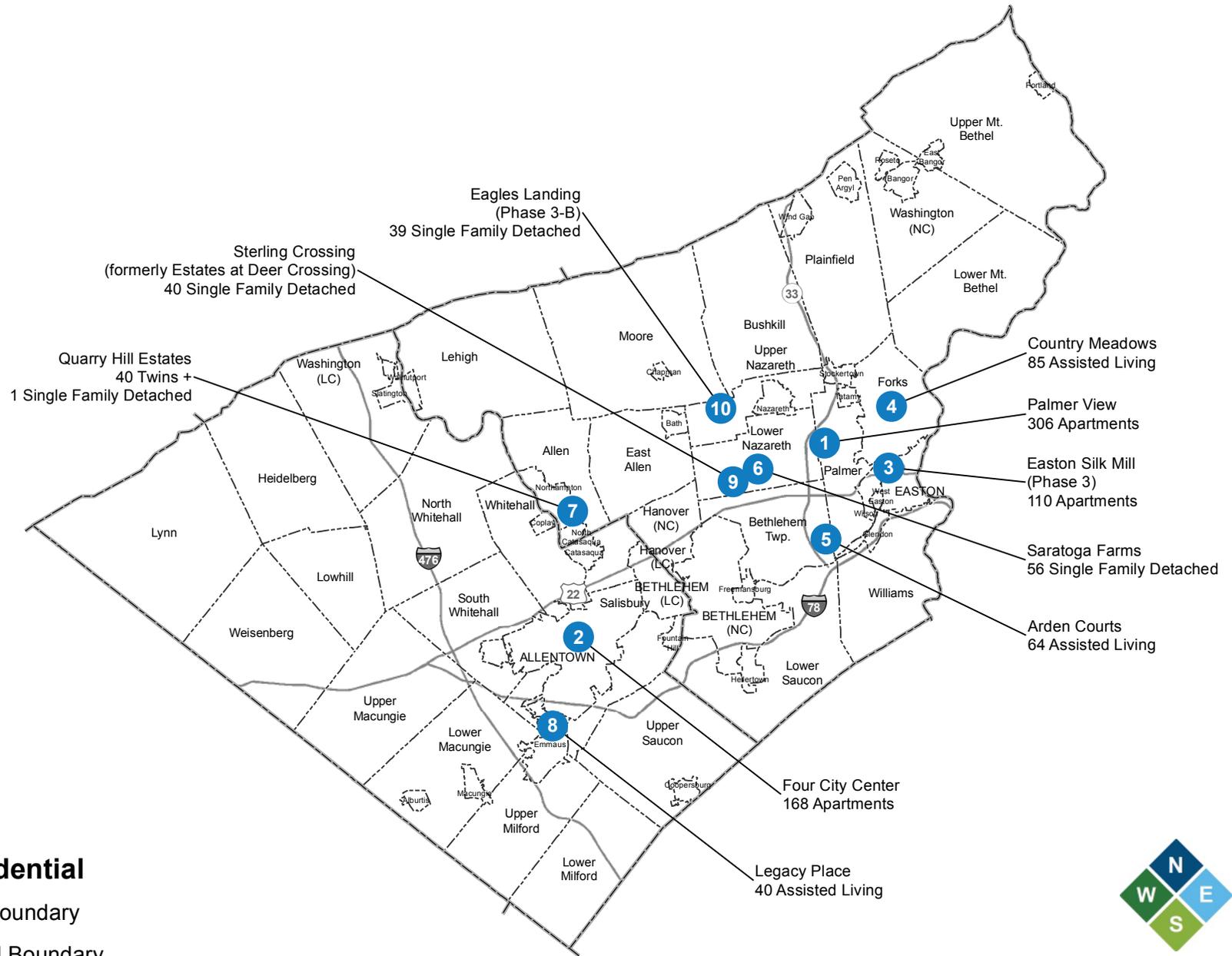
From the 2014 top ten residential developments, measured in terms of approved lots, three developments with over 100 units were all apartments, and an additional three developments were assisted living. Only one proposal featured more than 50 approved lots going to a single family detached use: *Saratoga Farms*, with 56 lots (or 56 units). All but two of the top ten are in Northampton County.



In 2014, the average density of approved residential development increased to 3.0 units per acre. The average residential densities for 2013 and 2014 were significantly higher than any of the preceding years, when approved residential lots typically averaged below 2.0 units per acre.

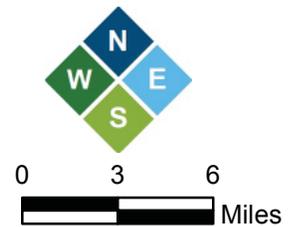
The approval of the Four City Center development, in which 168 units will rest on a .7-acre parcel in downtown Allentown, skews the density numbers for Lehigh County, since no other apartment lots were approved in the county that year. During 2014, the average density of approved residential development was 4.2 units per acre in Lehigh County (again, largely influenced by the Four City Center development) and 2.7 units per acre in Northampton County. For comparison purposes, the *County Comprehensive Plan* classifies four units per acre as “urban development”. However, the density for single family dwellings, historically the most popular kind of housing type, remains at well below 1 unit per acre across the region.





### Top 10 Residential

- County Boundary
- - - - Municipal Boundary
- Major Roads

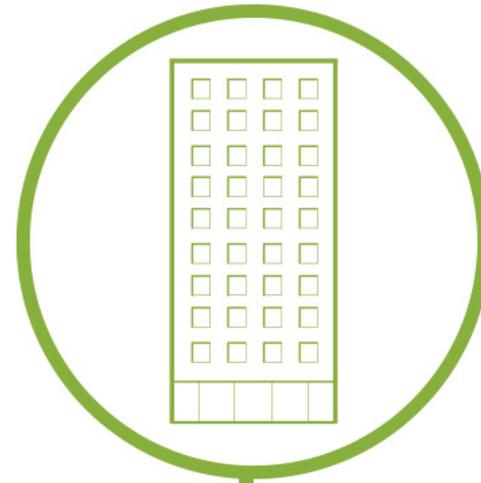


# Examples of Residential Lot Developments

Multi-Family Apartment  
One Lot = 480 Units

Single Family Attached  
Three Lots = Three Units

Single Family Detached  
One Lot = One Unit



**DENSITIES BY RESIDENTIAL HOUSING TYPES 2014**

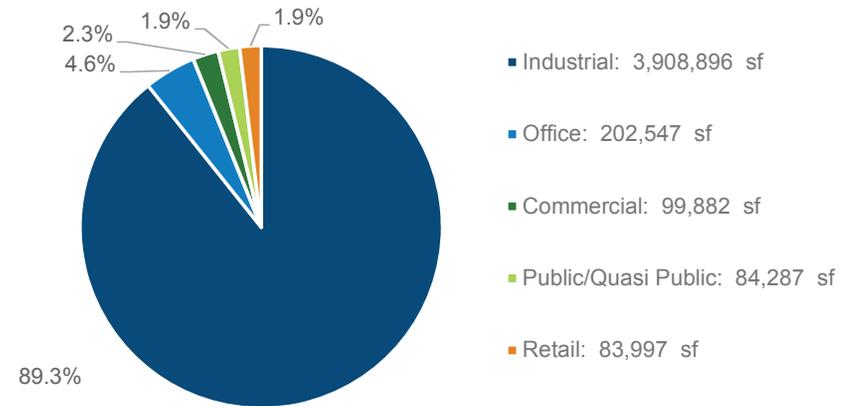
Lehigh County	Units	Acres	Density (units per acre)
Apartment	168	0.7	240.0
Assisted Living	40	2.5	16.0
Condominium	0	0	0.0
Mobile Home Park	0	0	0
Planned Residential Development	0	0	0
Single Family Dwelling	47	57.6	0.8
Townhouse	0	0	0
Twin	0	0	0
<b>Total</b>	<b>255</b>	<b>60.8</b>	<b>4.2</b>

Northampton County	Units	Acres	Density (units per acre)
Apartment	481	36.6	13.1
Assisted Living	151	32.4	4.7
Condominium	0	0	0
Mobile Home Park	0	0	0
Planned Residential Development	0	0	0
Single Family Dwelling	168	225.4	0.7
Townhouse	8	0.7	11.4
Twin	54	20.5	2.6
<b>Total</b>	<b>862</b>	<b>315.6</b>	<b>2.7</b>

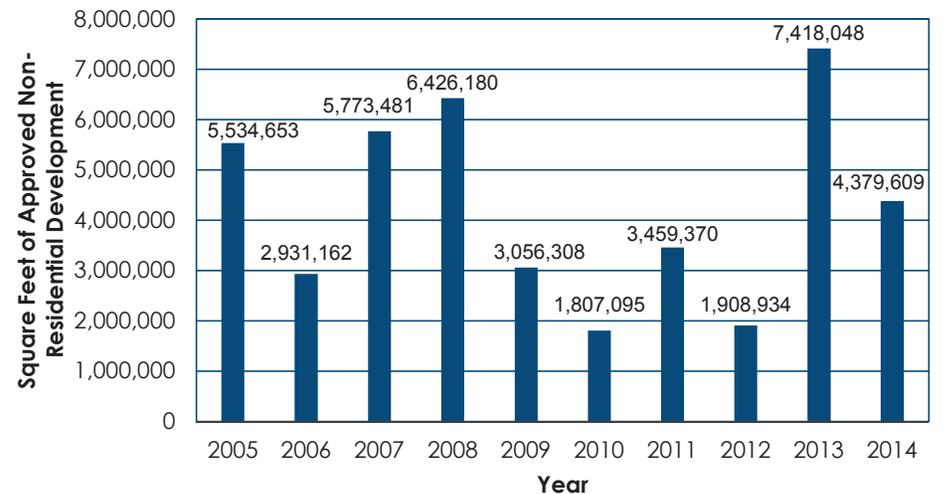
Lehigh Valley	Units	Acres	Density (units per acre)
Apartment	649	37.3	17.4
Assisted Living	191	34.9	5.5
Condominium	0	0	0
Mobile Home Park	0	0	0
Planned Residential Development	0	0	0
Single Family Dwelling	215	283	0.8
Townhouse	8	0.7	11.4
Twin	54	20.5	2.6
<b>Total</b>	<b>1,117</b>	<b>376.4</b>	<b>3.0</b>

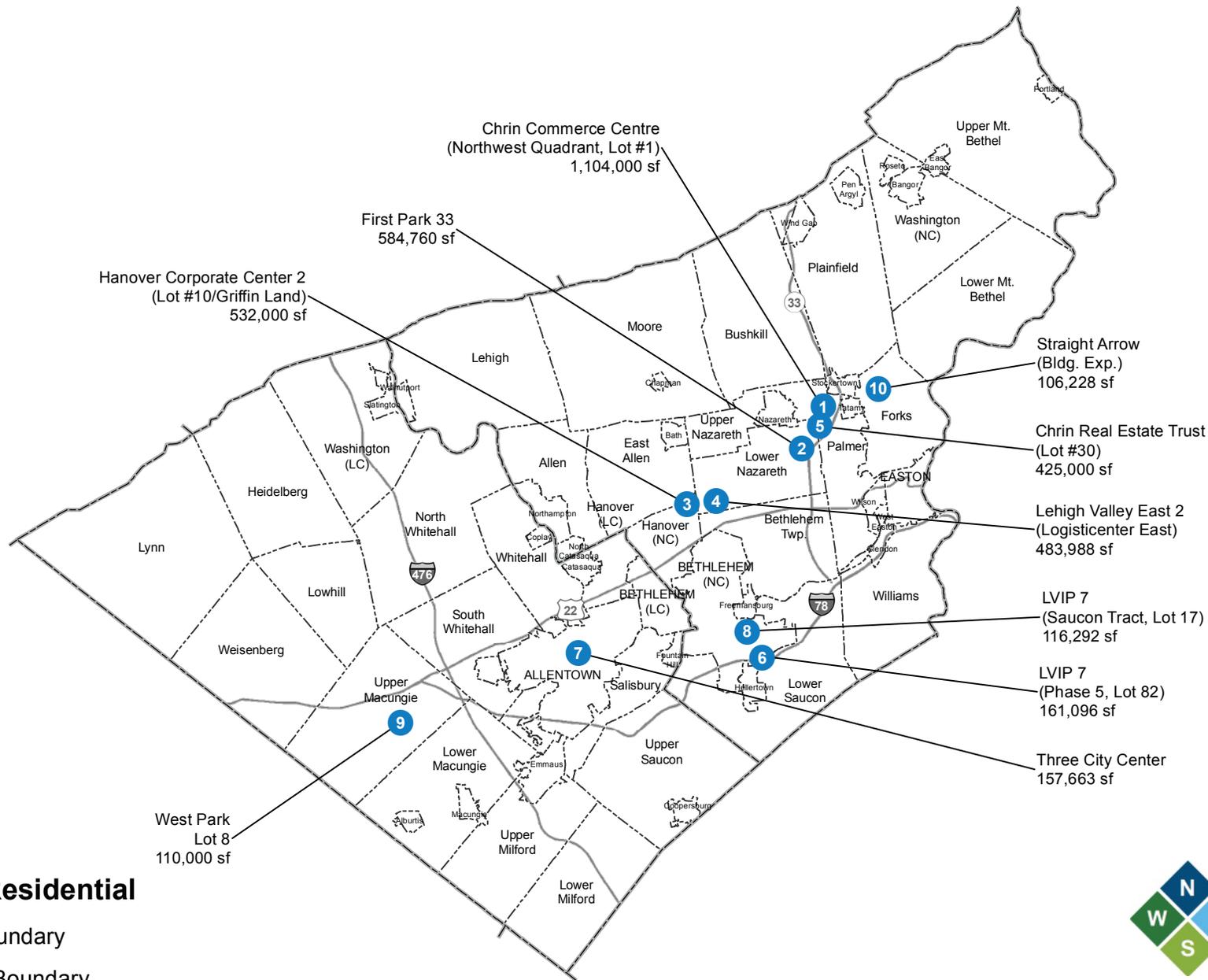
**IX. NON-RESIDENTIAL DEVELOPMENT**

The LVPC quantifies the lots of non-residential development through square footage. For example, if a plan subdivides one lot into three lots with 80,000 square feet in each lot, the total square footage for those lots is 240,000. During 2014, 4,379,609 square feet of non-residential development was approved, the vast majority of which (almost 90%) falls within the Industrial classification. Office was the second most common use, at a distant 202,547 square feet, or 4.6% of the total for non-residential square footage.



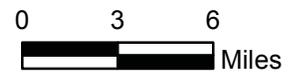
Note: No Recreation or Transportation approvals in 2014





### Top 10 Non-Residential

- County Boundary
- - - - Municipal Boundary
- Major Roads

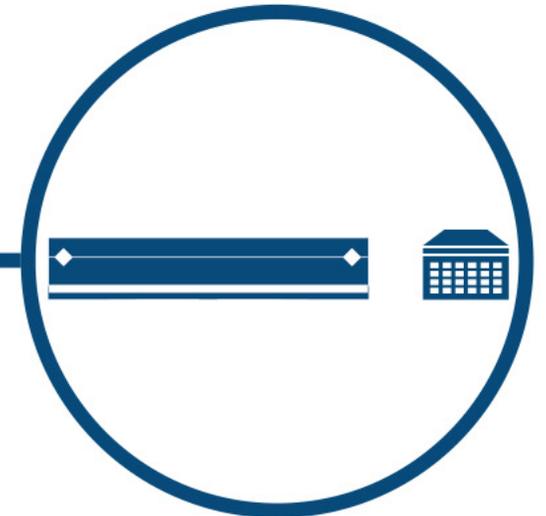


# Examples of Non-Residential Lot Developments

One Lot = 120,000 SF Manufacturing

One Lot with 1,800,000 SF Warehouse  
+ 100,000 SF Office  
Total Development = 1,900,000 SF

One Lot Subdivided into Three Lots  
One 80,000 SF Office Building per Lot  
Total Development = 240,000 SF Office



Based on a ten-year perspective, this total square footage is a decrease of 41% from 2013 levels. While such a drop is significant, the 2014 total remains higher than any count of non-residential square footage since 2008.

Of the ten largest approved projects, all are industrial developments except Allentown's Three City Center, which is office development. Many of the industrial projects are warehouses located in close proximity to the region's major highways. Among these include the three developments straddling S.R. 33 in Lower Nazareth and Palmer townships, while the redevelopment of the Bethlehem Steel site through the various phases of Lehigh Valley Industrial Park (LVIP) sit close to the Interstate 78 interchange with S.R. 412. Though 2014

was less busy for Lehigh County, the western edge of U.S. Highway 22 in Upper and Lower Macungie townships is often a popular site for the expansion of new industry, evidenced by the West Park Lot #8 development from last year.

Of the remaining non-residential development across the two counties, the other office developments are considerably smaller than Three City Center in Allentown, and only two retail developments from 2014 exceed 20,000 square feet. Clearly, industrial development has been the most active non-residential approved use, both in terms of size of the developments and the number of proposals.

		Square Feet	
Municipality	Development Name		
COMMERCIAL	Lower Nazareth Township	Keystone Real Estate Mgmt (Milham Auto Expansion)	36,338
	Hanover Township (LC)	A. Duie Pyle (New Garage)	13,541
	Lower Nazareth Township	Brown Daub Dealership (Fiat Showroom)	12,807
	Upper Macungie Township	The Goddard School	11,219
	Allentown City	McDonald's Rebuild (1432 South 4th St)	5,155
	South Whitehall Township	Dorney Park (Locker Building)	5,000
	Forks Township	McDonald's (Town Center Blvd)	3,896
	South Whitehall Township	Cooper, Peter (Proposed Carwash Facility)	3,034
	Bethlehem City (NC)	Car Service Center	3,024
	Upper Macungie Township	Dan's Auto Repair	2,688
	Allentown City	Dunkin' Donuts (Parkway Shopping Center)	2,022
	Whitehall Township	A-Team Auto Center (Bldg. Exp.)	1,158
	<b>TOTAL COMMERCIAL</b>		<b>99,882</b>

INDUSTRIAL	Palmer Township	Chrin Commerce Centre (Northwest Quadrant, Lot #1)	1,104,000
	Lower Nazareth Township	First Park 33	584,760
	Hanover Township (NC)	Hanover Corporate Center 2 (Lot #10/Griffin Land)	532,000
	Lower Nazareth Township	Lehigh Valley East 2 (Logisticenter East)	483,988
	Palmer Township	Chrin Real Estate Trust (Lot #30)	425,000
	Bethlehem City (NC)	LVIP 7 (Phase 5, Lot 82)	161,096
	Bethlehem City (NC)	LVIP 7 (Saucon Tract, Lot 17)	116,292
	Upper Macungie Township	West Park (Lot #8)	110,000
	Forks Township	Straight Arrow (Bldg. Exp.)	106,228
	Lower Macungie Township	IIT Valley Crossings (Lehigh Valley South IP, Lot 21)	106,080
	Bethlehem Township	Flexicon Corp. (2013 Bldg. Exp.)	75,196
	Bethlehem Township	BGSD, Inc. (LVIP 6, Lot #9)	43,200
	Lower Nazareth Township	Keystone Foods (Warehouse Additions)	29,600
	Upper Milford Township	Yext, Walter (Tank Farm Ind. Park)	12,000
	Allentown City	Schneider & Sons (801 N. Meadow St)	10,040
	Hanover Township (NC)	Freshpet Building Expansion #2	9,416
<b>TOTAL INDUSTRIAL</b>		<b>3,908,896</b>	

		Square Feet	
Municipality	Development Name		
OFFICE	Allentown City	Three City Center	157,663
	Easton City	Easton Silk Mill (Phase 1 & 2)	20,221
	Bethlehem Township	Freemansburg Dental Office	9,303
	Hanover Township (NC)	Luis and Christine, LLC (Hanover Highlands, Lot #3)	5,824
	Bethlehem Township	People First Federal Credit Union	4,976
	Lower Macungie Township	Williams, Thomas (4536 Hamilton Blvd)	4,560
<b>TOTAL OFFICE</b>		<b>202,547</b>	

PUBLIC & QUASI PUBLIC	Easton City	Lafayette College (Film & Media Studies Bldg)	14,675
	Lower Macungie Township	Faith Evangelical Free Church (Phase 1)	14,250
	Bethlehem City (LC)	Notre Dame of Bethlehem Parish Center Exp.	13,500
	Upper Nazareth Township	Northampton County EOC (Garage Addition)	13,123
	Washington Township (LC)	Living-Stone Christian Conf. Center (Building Exp.)	11,436
	Washington Township (NC)	Calvary Church of the Nazarene (Bldg. Exp.)	6,617
	Easton City	Lafayette College (Oechsle Center)	5,475
	Moore Township	Emmanuel's Evangelical Lutheran Church (Bldg. Exp.)	5,211
<b>TOTAL PUBLIC &amp; QUASI PUBLIC</b>		<b>84,287</b>	

RETAIL	Allentown City	Four City Center	39,906
	Easton City	Easton Silk Mill (Phase 1 & 2)	27,873
	Allentown City	Three City Center	6,982
	Walnutport Borough	Blue Ridge Auto Service & Tire	6,895
	Easton City	Redevelopment Authority of Easton (Northampton St.)	2,341
<b>TOTAL RETAIL</b>		<b>83,997</b>	

## X. ADDITIONAL HISTORICAL DATA

The following tables and graphs provide more detailed information on how the subdivision and land development activity that took place in the Lehigh Valley during 2014 compares to the past, with metrics dating back 15 to 30 years. Although the peak land development activity since 1985 occurred in the late 1980s, the mid-2000s were nearly as strong. Meanwhile, the last few years are slowly inching up to levels that still don't approach the previous trough in subdivision activity during the early 1990s. At any rate, 2014 was among the most favorable years of all in terms of the proportion of total lots that were approved.

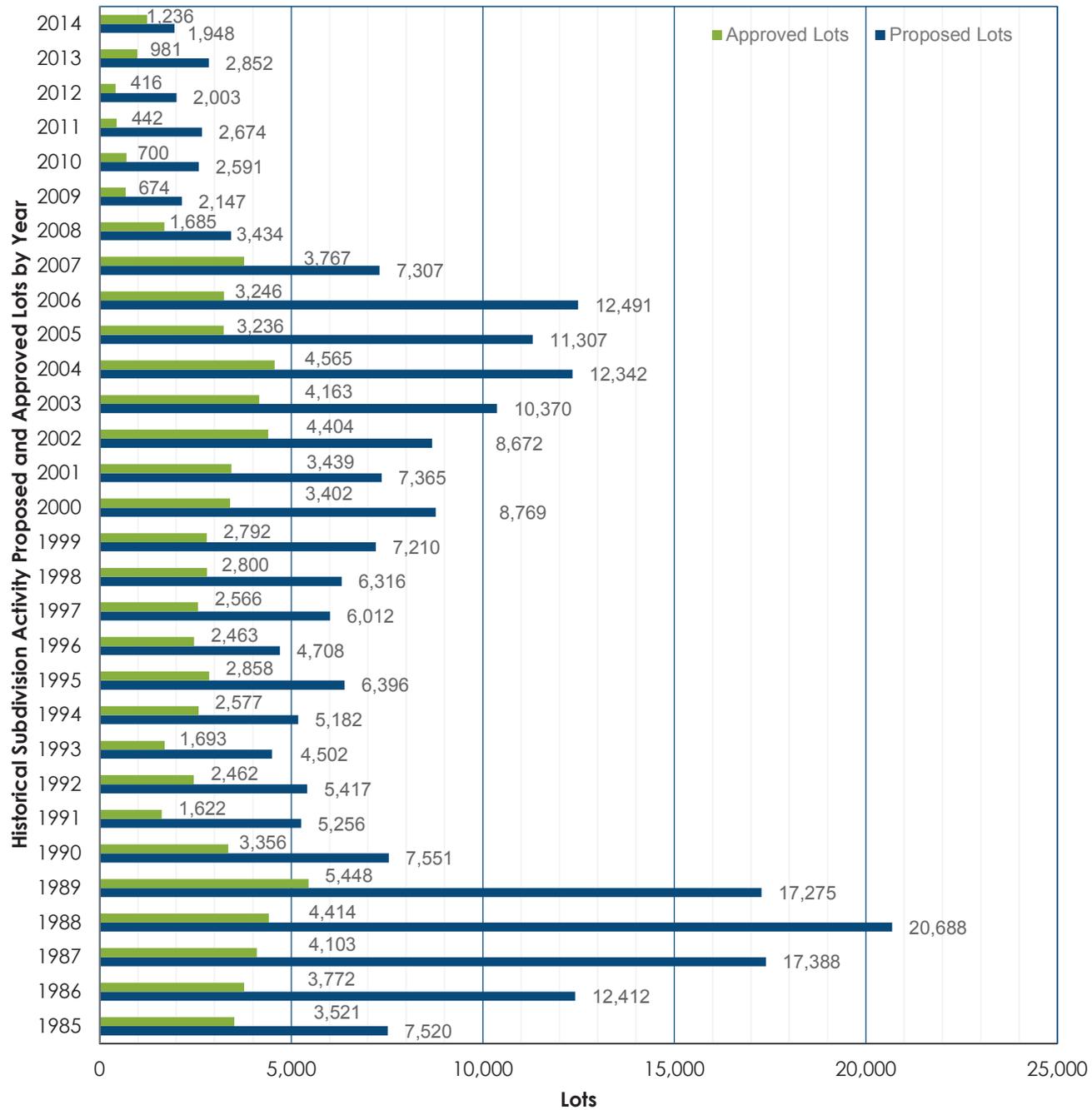
The correlation between the unemployment rate and subdivision activity reveals that the Lehigh Valley has returned to the unemployment levels of the early 2000s, but development activity still lags. However, the combination of development spurred in the City of Allentown by the Neighborhood Improvement Zone and a steadily declining unemployment rate (annual 7.0% in 2013, annual 5.3% in 2014) should bode well for sustained regional subdivision activity in the years ahead.

Breaking the data into the key components of residential and non-residential development can show how the economy's ups and downs can affect certain development types disproportionately. For the purpose of clarity, some of the smaller categories have been grouped together: for example, "Townhouse" and "Twin" are together, while "Other" includes "Mobile Home" and "Planned Development"—categories that are so uncommon that years can pass without a single approved lot receiving this classification. Lastly, the "no construction" classification refers to lots that were approved without development proposed.

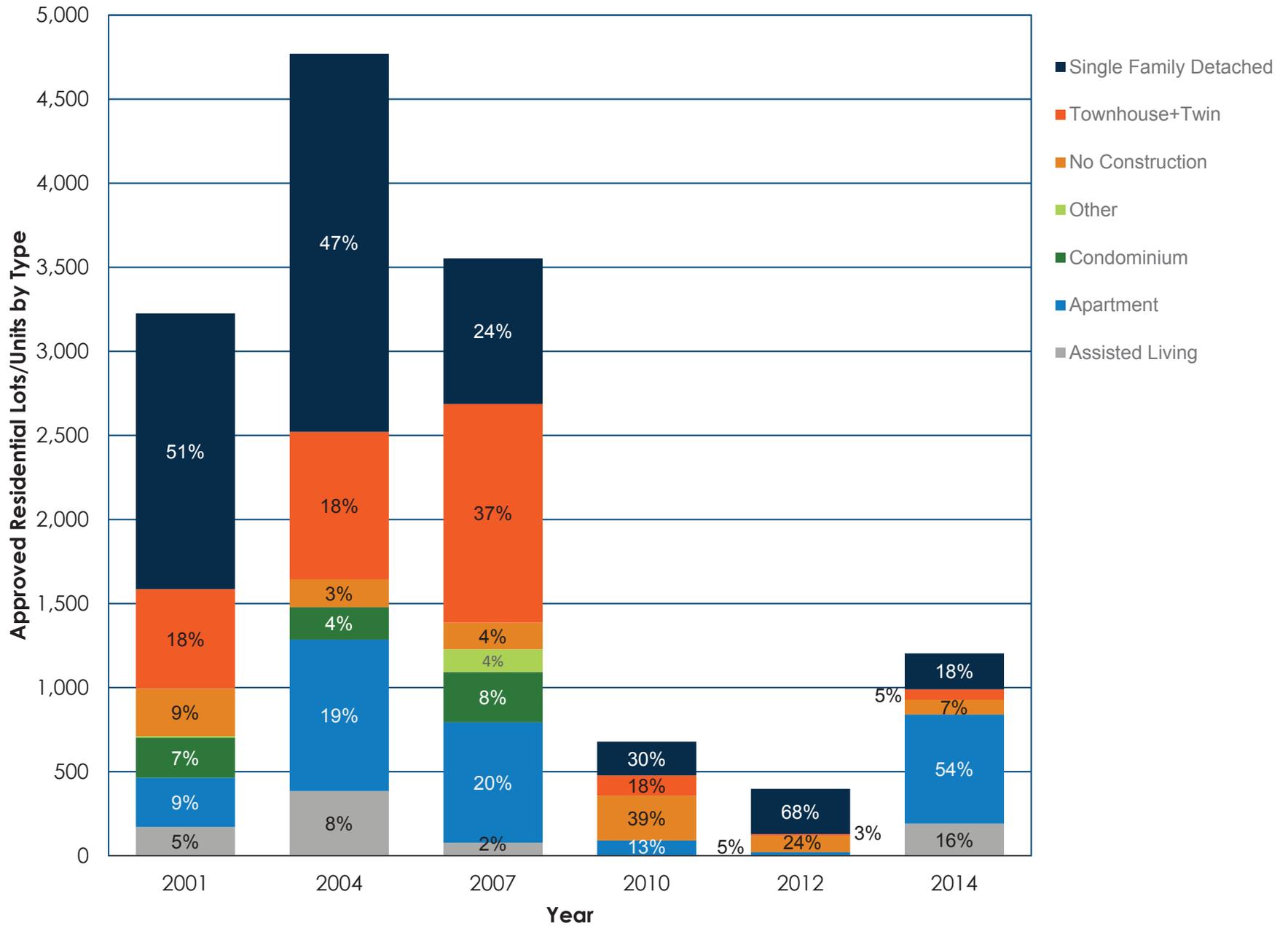
This tactic was particularly common during the peak of the recession in 2010 and 2011, when developers began subdividing but did not yet build, often because they chose to wait for market conditions to improve.

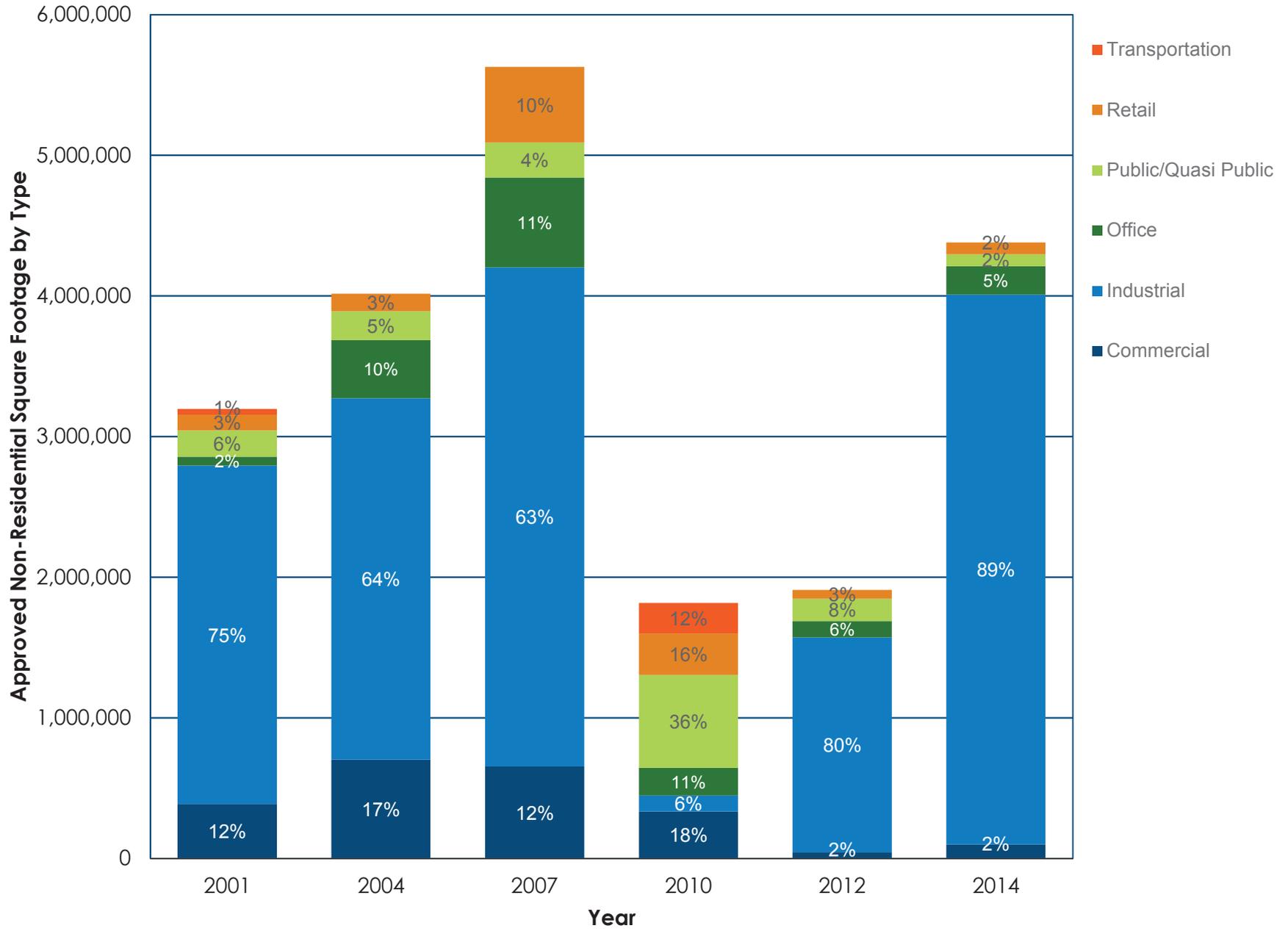
As the graph indicates, apartments remain the most commonly approved housing type—a trend that has emerged only since 2013. Approved single family detached lots continue to comprise a modest share of the total, and the portion of approved condominiums has remained at zero or close to zero for the past few years. During the peak of the recession, approved apartment units were low in number, in keeping with the contraction of approvals across all housing types. In 2013 and 2014, apartments experienced a resurgence, with approved levels on par with the pre-recession era; however, since most other housing types (particularly single family detached and townhomes) have not rebounded, apartments now comprise a much greater share of approved residential units than they ever have in the last 15 years.

Industrial development has dominated the development scene for most of the 21<sup>st</sup> century—with the exception of the peak recession year of 2010, when it only comprised 6% of a much smaller total. That year was also the only year when other, less common uses, such as transportation and public/quasi public, became more prevalent. During the economic recovery, approved non-residential seems to have rebounded much more substantially than residential development, with a higher proportion going to industrial uses than ever before. Meanwhile, retail and commercial are both particularly small fragments of the non-residential totals, just as they were in 2012.









## XI. RESIDENTIAL BUILDING PERMITS

In addition to subdivision activity data, which provides a “macro” overview of development, residential building permits can provide a “micro” overview.

The number of building permits and where those permits are being approved are good companion indicators, showing where development is occurring most intensely in the Lehigh Valley. An approved subdivision shows that the developer has satisfied the zoning and subdivision requirements. A building permit shows that the developer has satisfied the necessary paperwork to build a house or apartment building on the micro level. Both sets of data can demonstrate, generally, the perceived health of the housing market.

This year, the LVPC procured building permit data for the two counties from the Governor’s Center for Local Government Services within the state’s Department of Community and Economic Development (DCED). While historically the LVPC has used U.S. Census Bureau figures, the DCED data is available at an earlier point in the year and involves direct reporting of the municipalities’ permit data to this centralized, state repository.

This data source, only recently available and only vetted by the State’s tech team for 2013 and 2014, accounts for all Pennsylvania municipalities that have elected to enforce the Uniform Construction Code (UCC) locally, making them

“opt-in” municipalities. Other municipalities—the “opt-outs”—have relinquished UCC enforcement authority to either the Pennsylvania Department of Labor and Industry or certified third-party agencies. The vast majority of municipalities in the state are opt-ins, and their data are easily available. The opt-out municipalities are not required to file, though most of them do. In Lehigh County, all municipalities are opt-in, but Northampton County has several opt-out municipalities, indicated by an asterisk. For the municipalities with permits listed for 2013 but not 2014, the DCED had not yet received 2014 data at the time of this report’s publication.

Similar to subdivision activity, permits for new construction are generally in the townships, although with the rise in proposed apartments, urban areas—namely the cities—will see increases in the coming years in building permits in their municipalities. The three cities—Allentown, Bethlehem and Easton—have some of the oldest housing stock in the region, and residential building permits for new construction (which includes single family detached and townhouse units not exceeding 3 stories in height) are, not surprisingly, fairly low. However, the permits in the three cities for “other residential” (which includes additions, accessory structures, demolitions, electrical, mechanical, plumbing, etc.) are among the highest in the region, indicating that a large volume of modifications and renovations are taking place among this older housing in the cities.

## PENNSYLVANIA DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT BUILDING PERMIT DATA

		2013	2013	2013 New	2013	2013	2014 New	2014	2014	2014	2014
		New Res	Other Res	Comm	Other	Total	Res	Other	New	Other	Total
					Comm			Res	Comm	Comm	
Lehigh	Alburtis	7	30	1	10	48	42	41	0	5	88
Lehigh	Allentown	17	2,789	20	2,186	5,012	19	2,033	8	1,845	3,905
Lehigh	Catasauqua	0	95	0	26	121	1	45	0	7	53
Lehigh	Coopersburg	0	77	0	26	103	4	74	0	8	86
Lehigh	Coplay	0	109	0	12	121	0	135	0	13	148
Lehigh	Emmaus	1	166	1	49	217	2	192	0	72	266
Lehigh	Fountain Hill	0	59	0	17	76	1	64	1	21	87
Lehigh	Hanover	0	12	0	125	137	0	3	0	132	135
Lehigh	Heidelberg	7	44	0	20	71	N/A	N/A	N/A	N/A	N/A
Lehigh	Lower Macungie	69	908	15	163	1,155	26	835	53	167	1,081
Lehigh	Lower Milford	2	43	0	5	50	12	41	0	4	57
Lehigh	Lowhill	20	23	3	21	67	4	15	0	1	20
Lehigh	Lynn	7	63	0	15	85	9	57	1	7	74
Lehigh	Macungie	1	30	0	5	36	4	27	0	13	44
Lehigh	North Whitehall	22	138	0	29	189	20	126	0	37	183
Lehigh	Salisbury	8	306	2	218	534	3	237	4	162	406
Lehigh	Slatington	1	43	0	10	54	12	98	0	110	220
Lehigh	South Whitehall	20	444	3	495	962	15	320	2	327	664
Lehigh	Upper Macungie	137	258	9	200	604	137	298	3	193	631
Lehigh	Upper Milford	22	243	1	6	272	87	68	0	16	171
Lehigh	Upper Saucon	287	347	7	115	756	94	166	2	71	333
Lehigh	Washington	2	33	0	0	35	3	30	0	0	33
Lehigh	Weisenberg	28	63	19	36	146	46	56	22	28	152
Lehigh	Whitehall	46	813	1	546	1,406	N/A	N/A	N/A	N/A	N/A

**PENNSYLVANIA DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT BUILDING PERMIT DATA**

		2013 New Res	2013 Other Res	2013 New Comm	2013 Other Comm	2013 Total	2014 New Res	2014 Other Res	2014 New Comm	2014 Other Comm	2014 Total
Northampton	Allen	29	90	5	15	139	12	52	9	8	81
Northampton	Bangor	2	25	0	2	29	N/A	N/A	N/A	N/A	0
Northampton	Bath	0	10	1	4	15	N/A	N/A	N/A	N/A	0
Northampton	Bethlehem (city)**	10	1,475	7	1,406	2,898	20	2,249	9	1,306	3,584
Northampton	Bethlehem (township)	8	376	24	113	521	31	346	29	165	571
Northampton	Bushkill*	11	39	0	0	50	2	5	0	0	7
Northampton	Chapman*	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Northampton	East Allen	3	57	0	15	75	1	37	0	25	63
Northampton	East Bangor*	2	3	0	0	5	N/A	N/A	N/A	N/A	0
Northampton	Easton	2	1,096	4	274	1,376	0	934	3	279	1,216
Northampton	Forks	31	463	3	18	515	43	451	4	17	515
Northampton	Freemansburg	0	43	9	9	61	0	0	0	0	0
Northampton	Glendon	0	1	0	2	3	0	2	0	0	2
Northampton	Hanover	65	126	3	84	278	66	136	0	69	271
Northampton	Hellertown	16	155	1	53	225	5	82	0	11	98
Northampton	Lehigh	12	155	0	32	199	18	178	0	21	217
Northampton	Lower Mount Bethel	2	27	1	2	32	4	27	0	2	33
Northampton	Lower Nazareth	41	33	4	70	148	44	29	4	56	133
Northampton	Lower Saucon	1	143	1	24	169	10	103	0	31	144
Northampton	Moore*	6	25	0	0	31	2	7	0	0	9
Northampton	Nazareth	3	27	1	13	44	N/A	N/A	N/A	N/A	0
Northampton	North Catasauqua	0	23	0	2	25	0	32	0	2	34
Northampton	Northampton	5	62	1	14	82	1	56	0	22	79
Northampton	Palmer	29	564	2	49	644	31	553	22	46	652
Northampton	Pen Argyl	0	86	0	6	92	0	26	0	2	28
Northampton	Plainfield	7	69	0	25	101	5	69	1	17	92
Northampton	Portland	0	1	0	3	4	0	0	0	2	2
Northampton	Roseto	1	7	0	1	9	0	3	0	1	4
Northampton	Stockertown	0	7	0	2	9	0	0	0	0	0
Northampton	Tatamy	0	9	1	3	13	0	11	0	0	11
Northampton	Upper Mount Bethel	16	12	0	0	28	24	0	0	0	24
Northampton	Upper Nazareth	57	121	0	39	217	45	127	0	3	175
Northampton	Walnutport	2	10	0	2	14	N/A	N/A	N/A	N/A	0
Northampton	Washington*	5	22	0	0	27	2	6	0	0	8
Northampton	West Easton	2	12	0	4	18	1	14	1	1	17
Northampton	Williams	35	84	0	4	123	6	67	5	2	80
Northampton	Wilson	0	218	0	44	262	0	161	0	64	225
Northampton	Wind Gap*	0	3	0	0	3	0	2	0	0	2

\* Opt-Out Municipality

\*\* Bethlehem (city) includes the portions of the city in both Lehigh and Northampton counties

## XII. FINAL CONCLUSIONS

Based on the data collected and analyzed over the preceding chapters, the LVPC has devised several key “takeaways” about subdivision and building activity in 2014 and what it means for the years ahead:

### **Apartment construction will continue unabated for the foreseeable future.**

At the peak of the recession, apartment construction was in full retraction, along with just about every other residential type. However, it has rebounded more confidently than any of the others, with quantities of approved lots in 2014 on par with 2005 through 2007. Since none of the other housing types have experienced such a comeback, apartments now comprise a far greater share of approvals than ever before. Potential homebuyers from the past are showing continued apprehension toward getting a mortgage, due to the perception that homeownership is no longer as strong of an investment and to the diminished willingness to commit to residing in a region for the long term. As a result, rental units are likely to remain popular for quite some time, and developers will persistently respond to this demand.

### **Assisted living developments have also demonstrated renewed strength.**

The aging population, particularly the Baby Boomers approaching and entering retirement age, is likely to result in a sustained demand for assisted living units. Though the approval of this housing type plunged at the peak of the economic downturn, it had bounced back by 2014. Though the number of approved assisted living units remains at about the same level as it was in the early years of the previous decade, the total approved units remain much lower, so assisted living is occupying a much greater portion than in the past. While single family attached housing has recovered slightly, we may find that much of the demand for this housing type gets diverted into developments that offer some sort of life assistance.

**Non-residential (and particularly industrial growth) will cluster around key transportation arterials and nodes.** Trucking will remain a critical means of moving freight well into the future, and logistical operations have seized upon the Lehigh Valley’s critical location along key corridors, such as U.S. 22, I-78, S.R. 33 and I-476. The exits off these corridors—particularly those that are currently less developed, or those where two major arterials converge—will remain desirable for the construction of industrial buildings, particularly focusing on warehousing and trucking terminals. Such facilities will comprise the overwhelming majority of non-residential square footage, as demand for these structures rapidly outpaces demand for new office or commercial buildings. Furthermore, those office buildings do not depend as greatly on either large tracts of undeveloped land nor proximity to major vehicular corridors.

**Other classes of non-residential—particularly retail and commercial—are unlikely to resurge.** The rapid growth of warehousing space augurs the American consumers’ increasing dependency on the internet and shipping to meet basic shopping needs. This shift in how we shop has come at the expense of conventional retail and commercial outlets, for which the growth in leasable square footage has long outpaced demand. Demand for retail developments will continue to recede as more shopping takes place in front of a computer screen, leaving greater interest in the retail and commercial nodes with some competitive advantage: a distinctive design, a strategic location or the cultivation of a particular experience that transcends conventional shopping. The reinvention of underutilized commercial and retail space will likely become a greater priority for municipalities and a lucrative opportunity for enterprising developers.

**The majority of development activity will still take place in just a few townships, but the three cities should make a modest comeback.** The superior performance of school districts is probably the greatest impetus for growth in the townships surrounding Allentown, Bethlehem and Easton, spurring both residential and concomitant non-residential development. However, the renewed interest in the downtowns of the three cities is manifested by the considerable activity taking place—the greatest volume of approved lots and final plans that these city centers have seen in forty years. Furthermore, certain segments of the population—particularly young professionals, empty nesters—do not value high performance of school districts as greatly, because they do not have nor plan to have any children. Instead, these demographic groups often overtly seek environments with historic architecture, a mixture of uses and a core walkability that the townships generally cannot provide. Thus, it is likely that a portion of the residential and non-residential growth that previously had dominated the townships will shift to older neighborhoods near the center of the cities. How large this portion is will depend on whether the interest in old urban environments sustains itself among future generations of consumers.

In conclusion, the economic downturn that began around 2008 and 2009 has dramatically altered the intensity, the type and the key nodes for development and subdivision activity. While the last few years have shown modest evidence that the course is steering somewhat back to pre-recession paradigms, particularly with the gradual recovery of the market for single family detached homes, the preference for rental units and the re-emergence of old urban centers will likely prevent an all-out return to the patterns which, as recently as 2006, seemed unlikely to change. Rather than perceiving the 2008-2012 shift in building activity as an aberration, it may very well serve as the “new normal” by which the counties, municipalities and the private sector should gauge future growth.

### XIII. DEFINITIONS

**Approved Lots.** Approved lots are those that are illustrated in a plan approved by the municipality and signed by the LVPC during the year. They are associated with final plans.

**Building Permits.** Written governmental permission for the construction, alteration or demolition of an improvement, showing compliance with building codes and zoning ordinances.

**Central Water System.** A publicly or privately-owned system of piping, tanks, pumping facilities and treatment works for the treatment and distribution of drinking water serving two or more lots in a service area limited to specific lots, subdivisions or land developments, or domestic water use in excess of one equivalent dwelling unit (EDU) on a single lot.

**Central Sewage System.** A publicly or privately-owned system of piping, tanks, pumping facilities and treatment works which provides for collection, conveyance and treatment of sewage or process wastewater serving two or more lots in a service area limited to specific lots, subdivisions or land developments, or domestic sewage disposal in excess of one EDU on a single lot.

**Community Water System.** A system of piping, tanks, pumping facilities and treatment works which provides for treatment and distribution of drinking water serving a generalized service area and designed independently of specific land developments or subdivisions.

**Density.** The number of residential dwelling or housing units per gross acre (du/acre). Densities specified in this plan are gross residential densities. For calculating gross residential density, the total acreage of a development includes those lands to be used for residential uses, and includes land within the development proposed to be used for streets and street rights-of-way, utility rights-of-way, sewage and water, drainage, and existing man-made water bodies which are entirely contained within the residential development. Lands for commercial, office, industrial uses, parks, open space, navigable water bodies, and other non-residential uses are not included.

**Final Plan.** A complete and exact plan, with a professional seal affixed and prepared for official recording as required by a municipal SALDO to define property rights, streets and other proposed improvements.

**Infrastructure.** The basic facilities, equipment, services and installations needed to support the growth and functioning of an urban area or developing community. Infrastructure includes, but is not limited to, roads, sanitary sewers and water supply systems.

**Land Development.** Any of the following activities:

- (1) The improvement of one lot or two or more contiguous lots, tracts or parcels of land for any purpose involving:
  - (i) a group of two or more residential or non-residential buildings, whether proposed initially or cumulatively, or a single non-residential building on a lot or lots regardless of the number of occupants or tenure; or
  - (ii) the division or allocation of land or space, whether initially or cumulatively, between or among two or more existing or prospective occupants by means of, or for the purpose of streets, common areas, leaseholds, condominiums, building groups or other features.
- (2) A subdivision of land.
- (3) Development in accordance with Section 503(1.1) of the Pennsylvania Municipalities Planning Code.

**Lehigh Valley.** An area composed of Lehigh and Northampton counties, Pennsylvania.

**LVPC.** Lehigh Valley Planning Commission. The official planning commission for Lehigh County and Northampton County and the regional planning commission for the Lehigh Valley.

**On-lot Sewage System.** A system of piping, tanks or other facilities serving a single lot and collecting and disposing of sewage in whole or in part into the soil or into any waters of the Commonwealth or by means of non-fixed pipe conveyance to another site for final disposal.

**Preliminary Plan.** In lesser detail than a Final Plan, a “proposal” showing proposed streets and lot layout and such other information as required by a municipal SALDO.

**Proposed Lots.** Proposed lots are those that are illustrated in a sketch or preliminary plan reviewed by the LVPC during the year.

**Public Sewage System.** A system of publicly-owned piping, tanks, pumping facilities and treatment works which provides for collection, conveyance and treatment of sewage and process wastewater serving a generalized service area and designed independently of specific land developments or subdivisions.

**Rural.** A sparsely developed area where the land is primarily used for farming, forestry, resource extraction, very low-density residential uses or open space uses.

**Sketch Plan.** An informal plan, indicating existing features of a tract and its surroundings and the general layout of the proposed subdivision. A sketch plan is not mandatory and is not a preliminary plan.

**Sprawl.** A haphazard and disorderly form of urban development with the following characteristics: residences far removed from stores, parks, and other activity centers; scattered or “leapfrog” development that leaves large tracts of undeveloped land between developments; commercial strip development along major streets; large expanses of low-density or single-use development; major form of transportation is the automobile.

**Subdivision.** The division or redivision of a lot, tract or parcel of land by any means into two or more lots, tracts, parcels or other divisions of land including changes in existing lot lines for the purpose, whether immediate or future, of lease, partition by the court for distribution to heirs or devisees, transfer of ownership or building or lot development.

**Total Lots.** Total lots are the combination of proposed and approved lots. The total number of lots is an indicator of the perceived strength of the Lehigh Valley housing market, as they represent “inventory” for developers. A reduction in the number of total lots would represent a perceived “cooling” of the housing market, and an increase in the number of lots would represent a perceived “warming” of the housing market.

**Urban Development.** Residential, commercial, industrial, institutional or other development which produces process wastes or sewage in excess of one EDU per acre, or which, by its nature and size, does not require a rural location or is designed to mainly serve a widespread or urban area.

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