



WINDSOR TOWNSHIP CORRIDOR
LAND USE ASSESSMENT:
RIGHT-SIZING THE COMMERCIAL
DISTRICT ALONG CAPE HORN &
WINDSOR ROADS

ABSTRACT

This study evaluates whether approximately 229 acres currently zoned Commercial along the Cape Horn–Windsor Road corridor remains the highest and best use, given Windsor Township’s population growth, housing needs, and market conditions.

Jessica M. Fieldhouse, AICP
Planning Department Manager

Contents

Executive Summary.....	2
Introduction	5
Zoning Analysis and Existing Land Use.....	6
Demographic and Housing Analysis	12
York County Market Analysis	15
Transportation Analysis	19
Conclusion – Suggested Strategy	27
Appendix.....	30

Executive Summary

Windsor Township is evaluating whether the 229-acre Commercial zoning district along Cape Horn Road and Windsor Road remains appropriate in light of updated demographic, market, land-use, and transportation conditions. This study provides a data-driven basis for future zoning, development, and infrastructure decisions ahead of a Comprehensive Plan update.

Key Findings

1. Land Use & Zoning: Commercial Acreage Is Oversized for Market Conditions

- Windsor Township is overwhelmingly rural or low-density; 88% of land is zoned Agricultural, Rural Residential, or Low-Density Residential.
- Only 3% of the Township is zoned General Commercial—yet nearly half of that is concentrated in one location: the 229-acre Cape Horn/Windsor Road district.
- Of the 229 acres zoned General Commercial:
 - 98% is currently farmed.
 - Only 1.6% is in active commercial use.
- Analysis shows this district is disproportionately large, out of scale with other commercial nodes, and larger than the local retail or office market can support, reinforcing a need to *right-size* this general commercial zoning district.

2. Housing & Demographics: Strong Growth and a Significant Shortage of Diverse Housing

- Population is projected to grow by 6,133 residents (according to DEP) between 2020 and 2050.
- Housing demand through 2050: 2,314 new units.
- Only 2% of existing housing is multifamily—dramatically lower than neighboring municipalities (14–24%).
- Very little new housing (1%) has been built since 2010.
- Fair-share housing expectations¹ identify a need for roughly 350 multifamily units.
- Housing costs have increased for renters by 51%, and those with mortgages by 6%.
- There is pronounced demand for “missing-middle” housing (townhomes, duplexes, triplexes, apartments), particularly in walkable, service-connected locations like the Cape Horn/Windsor corridor.

¹ In Pennsylvania, “Fair Share Housing” refers to the court-developed obligation—grounded in the MPC and the *Surrick* line of cases- that each municipality must zone enough land to provide a realistic opportunity for a reasonable range of multifamily and higher-density housing, so that zoning does not become exclusionary.

3. Market Analysis: Retail & Office Are Soft; Industrial Is Strong but Small-Bay

Focused Retail

- Both absorption and rents declined in 2025; vacancy rose slightly.
- No market demand exists for additional large-scale retail acreage.
- Recommendation: consolidate retail into 1–2 compact nodes and integrate ground-floor commercial into mixed-use buildings.

Office

- Vacancy is low, but demand is shifting to small, flexible suites—not new suburban office parks.
- Upper-floor offices in mixed-use environments are the most viable format.

Industrial

- Strongest-performing sector in the region.
- Market favors small-bay flex spaces (under 15,000 SF), not mega-warehouses.
- A large 1,000,000 SF distribution center is neither market-supported nor transportation-feasible.

4. Transportation: SR 24 Is Already Overburdened

- Cape Horn Road carries 32,000+ vehicles/day north of Windsor Road, with 13% trucks—exceptionally high for a mixed-use corridor.
- Crash data show three intersections on Cape Horn Road account for 72% of all crashes in the study area.
- Local roads (Ruppert, Belle) already experience unexpectedly high truck percentages.

Development Scenarios

- Warehouse (1 million SF):
 - Generates 1,618 daily trips, including 547 trucks—nearly all routed through SR 24.
 - Would push truck percentages far beyond safe thresholds and overwhelm critical intersections.
- Traditional Neighborhood Development (TND):
 - Depending on scale, generates 8,600–30,000 daily trips but far fewer trucks.
 - Traffic disperses in all directions, requiring intersection upgrades, multimodal improvements, and local connectivity planning.

5. Recommended Corridor Direction

The evidence supports rezoning the 229-acre site from an oversized commercial zone to a mixed-use district with varied commercial uses and housing types, such as:

- Missing-middle and multi-family housing
- Neighborhood-scale retail nodes (limited and walkable)
- Upper-floor office
- Small-bay flex industrial in limited, buffered locations
- Connected street networks and multimodal infrastructure

6. Conceptual Land Budget

Housing-Led, Walkable Mixed-Use TND Spine With Targeted Employment

- Residential TND Blocks 160-190 acres
- Mixed-Use/Main Street 25-35 acres
- Flex/Clean Industrial 40-80 acres
- Parks/Stormwater/Schools/Greenways 30-45 acres

This strategy aligns with real housing needs, moderates the risk of retail oversupply, reduces future truck traffic (compared to a new industrial district), supports fiscal resilience, and aligns with community character.

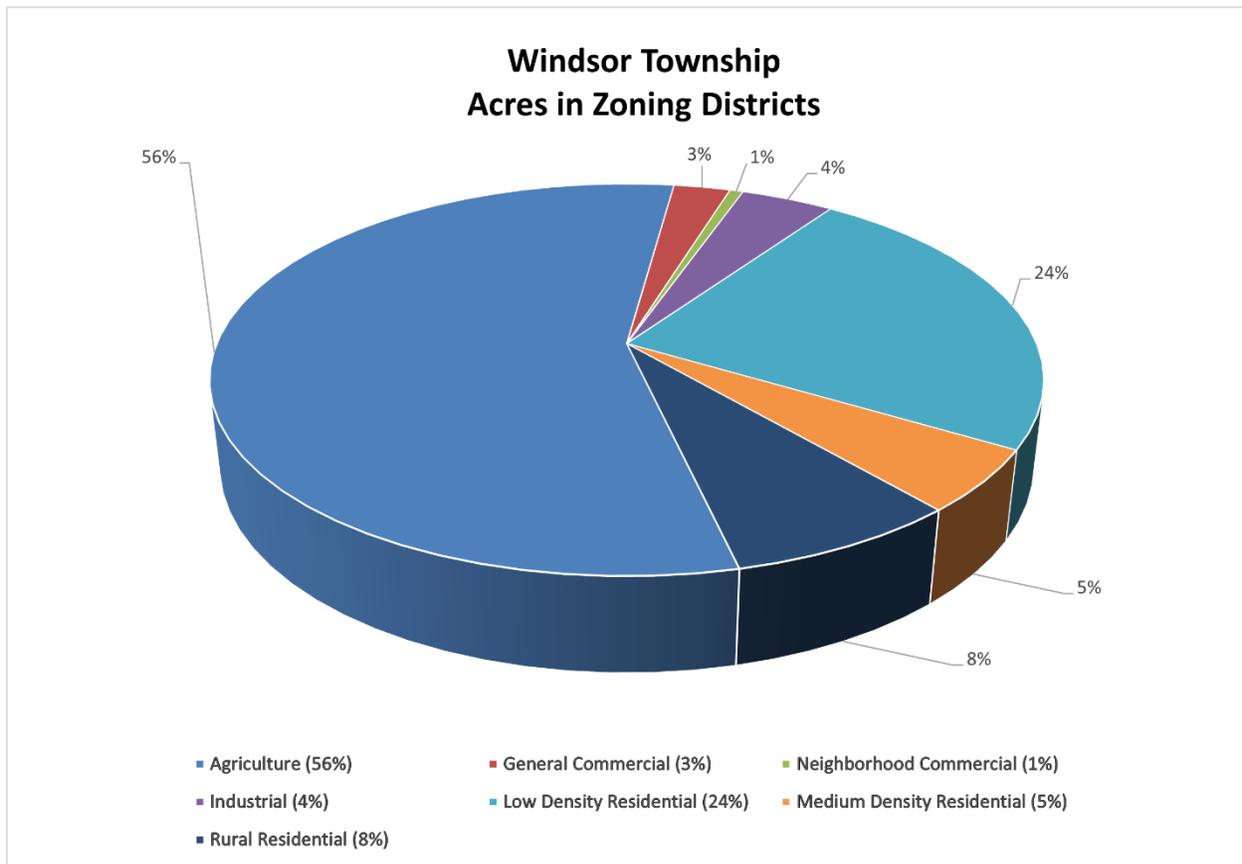
Introduction

Windsor Township is undertaking a focused Land Use Corridor Assessment to evaluate rezoning requests affecting approximately 229 acres between Cape Horn Road (SR 24) and Windsor Road and to establish a data-driven framework for future land use, zoning, and infrastructure decisions along the corridor from the Longstown intersection to just south of Ruppert Road (including portions of Windsor Road).

The Township's Comprehensive Plan requires an update; as such, this study is meant to provide the policy guidance typically found in a modern plan and lay the foundation for a subsequent Comprehensive Plan update.

The scope includes: a Demographic & Housing Analysis (population trends, housing stock, and demand for Windsor Township, York Township, and Springettsbury Township); a Zoning & Existing Land Use Assessment (inventory and zoning acreage by district); a Transportation Impact Assessment (review of current volumes; traffic safety; and comparative trip-generation for a 229+ acre TND versus a 1,000,000-sq-ft logistics facility); and an Office–Industrial–Retail Market Analysis using 2025 ROCK Commercial data (net absorption, vacancy, asking rents, and unit-size trends) to evaluate whether the corridor's General Commercial zoning remains appropriate.

Zoning Analysis and Existing Land Use



The pie chart titled “Windsor Township – Acres in Zoning Districts” visually displays how all land in the Township is distributed across zoning districts. The following percentages are shown:

Zoning Breakdown (as shown in the image):

- Agriculture: 56% (9,730 acres)
- Rural Residential: 8% (1,347 acres)
- Low-Density Residential: 24% (4,153 acres)
- Medium-Density Residential: 5% (897 acres)
- Industrial: 4% (749 acres)
- General Commercial: 3% (455 acres)
- Neighborhood Commercial: 1% (108 acres)

- 1. The township is dominated by agricultural zoning (56%).**
More than half of all land in Windsor Township is zoned Agriculture.

Planning Implications:

- A rural development pattern

- Significant preservation of farmland
- Limited availability of land designated for urbanized, mixed-use, or high-intensity development
- Agricultural zoning is the single most influential determinant of land use in the Township

This point is especially important when evaluating rezoning requests that would convert farmland to commercial, mixed-use, or industrial uses. That said, the 229 acres of existing farmland at the heart of this analysis are already zoned General Commercial; therefore, agricultural preservation is not the focal point of this analysis.

2. Residential zoning makes up nearly one-third of the township.

- Low-Density Residential: 24%
 - Medium Density Residential: 5%
- Total Residential: 29%

Planning Implications:

- The Township’s housing pattern is largely suburban, low-density.
- Medium-density districts are limited, making diversified housing types (townhomes, small-scale multi-family, senior housing) scarce in terms of zoned land availability.
- This pattern may affect the Township’s Fair Share housing obligations because the supply of medium- or higher-density residential zoning is limited, which raises housing costs and makes it more difficult for young adults who grew up in the Township to be able to afford to stay there.

3. Commercial land is limited.

- General Commercial: 3%

Planning Implications:

Commercial land uses comprise a relatively small portion of the Township’s overall land area, reflecting its predominantly residential and agricultural character.

- Windsor Township is not heavily commercialized.
- The majority of the Township’s commercial areas can be found in smaller nodes dispersed along or near Cape Horn Road:
 - Cape Horn Road at Lombard Road – 88 ac.
 - Cape Horn Road at Holtzapple Road – 39 ac.
 - Delta Road and Springvale Road – 19 ac.
 - Delta Road at Windsor Road – 37 ac.

- Springvale Road – 20 ac.
- East Prospect at Nicholas Road – 11 ac.
- Cape Horn Road at East Prospect – 12 ac.
- 226 acres +/-**

- Cape Horn Road at Windsor Road – **229 acres +/-**

- The General Commercial Zoning District at Cape Horn Road and Windsor Road, extending south to just north of Sheldon Drive, represents nearly 50% of all areas in the Township zoned General Commercial and is two and a half times the size of the 86-acre General Commercial Zoning District surrounding Lombard Road and Cape Horn Road.
- 229 acres of General Commercial in one location is disproportionately large compared to the Township’s other commercially zoned areas and potentially more commercial acreage than the local market can absorb.

According to the above analysis, while the Township overall does not have a significant amount of commercial land, the amount designated along Cape Horn Road at Windsor Road is disproportionately large and out of character with the existing commercial areas within the Township.

4. Industrial land is also limited.

Industrial land uses comprise a relatively small portion of the Township’s overall land area, reflecting its predominantly residential and agricultural character.

Planning Implications:

- Industrial growth capacity is limited under existing zoning.
- Any market demand for distribution, manufacturing, or logistics would require rezoning or redevelopment.
- Industrial rezoning could be a more appropriate alternative than large-scale commercial rezoning, especially given the current industrial market strength in York County.

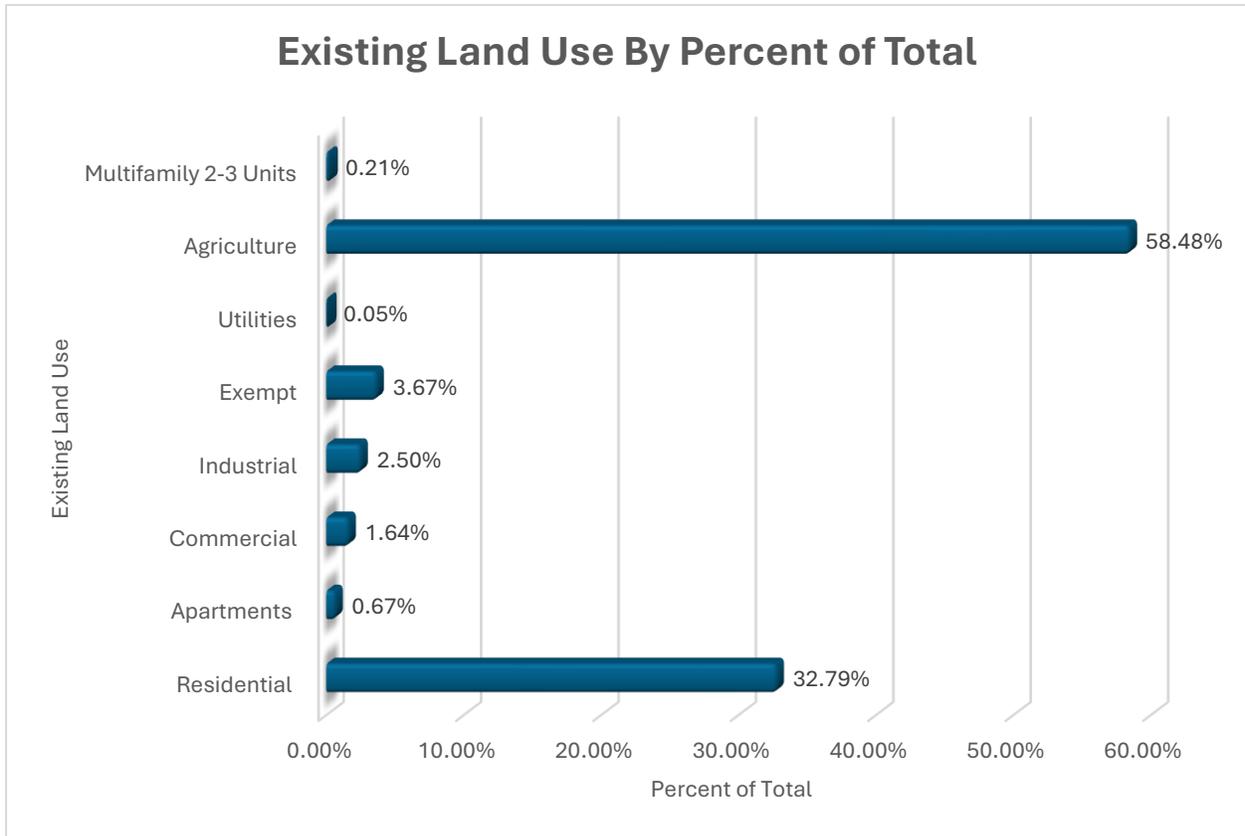
5. The Township is heavily weighted toward rural & low-intensity land uses.

When combining agriculture, rural residential, and low-density residential, 88% of the township is zoned for rural or low-density uses.

Planning Implications:

- The township’s existing zoning pattern restricts higher-density, mixed-use, walkable, or employment-centered development.

6. Existing land use is overwhelmingly dominated by agriculture and single-family residential.

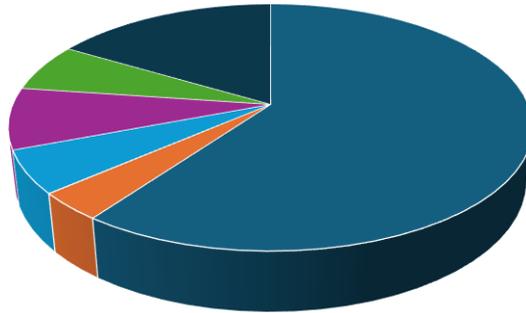


As shown in the table above, the dominant land uses are agriculture at nearly 60% and single-family residential at nearly 33%.

- Utilities and tax-exempt land comprise 3.72% of the Township.
- Industrial is at 2.5%, and Commercial is at 1.64%.
- Multifamily residential² represents just 0.88% of the Township.

² Apartments are larger or more complex residential buildings, usually 4+ units

Vacant Land by Zoning District



- Agriculture (1,707 ac.)
- Commercial Neighborhood (1 ac.)
- Low Density Residential (229 ac.)
- Rural Residential (468 ac.)
- General Commercial (103 ac.)
- Industrial (158 ac.)
- Medium Density Residential (180 ac.)

Total vacant land: 2,846 acres

By share of total vacant land:

- Agriculture 60% (1,707 ac)
- Rural Residential 16.4% (468 ac)
- Low-Density Residential 8.1% (229 ac)
- Medium-Density Residential 6.3% (180 ac)
- Industrial 5.6% (158 ac)
- General Commercial 3.6% (103 ac)
- Neighborhood Commercial 0.04% (1 ac)

Planning Implications:

- Most vacant capacity available sits outside of commercial zoning. Roughly 76% of all vacant land is in Agriculture and Rural Residential, with another 14% in Low/Medium-Density Residential, indicating a substantial by-right residential pipeline before any farmland conversions.
- The fact that most vacant land lies in Agriculture and Rural Residential districts means that the above, by-right, development would overwhelmingly produce single-family detached homes, limiting Windsor Township’s ability to meet demand for middle housing such as townhomes, duplexes, triplexes, and cottage courts. Allowing these missing-middle formats within the corridor would diversify the Township’s housing stock, reduce pressure to rezone agricultural land, and better align with population growth patterns and fair-share obligations.

Summary

Windsor Township is overwhelmingly rural and low-density, with limited land available for commercial or industrial development. The 229-acre commercial corridor currently under evaluation is unusually large relative to the township's overall small share of commercial zoning.

- Nearly 46% of all land zoned General Commercial is currently used for agricultural activities.
- Roughly 1.6% of the 229 acres of General Commercial at Cape Horn Road and Windsor Road are actively being used for commercial use; the remainder is being farmed.
- Of the total area zoned Industrial in the Township, approximately 57% has been developed.
- Approximately 5.7% of the Township is zoned to permit middle housing units (2 to 4 housing units in one structure). Recent PA court decisions support municipalities providing at least 7% of total land designated for the development of multi-family housing units.^{3,4}

³ *The three-tier fair-share test, established in Surrick v. Upper Providence Township (Pa. 1977), evaluates whether a municipality provides adequate opportunities for multi-family housing by examining growth patterns, level of development, and the amount of land realistically available for such housing.*

⁴ *Surrick v. Zoning Hearing Board of Upper Providence Township, 382 A.2d 105 (Pa. 1977), as summarized in Appendix 5-A: Fair Share Analysis (Oxford Region Multi-municipal Comprehensive Plan).*

Demographic and Housing Analysis

The appendix of this document contains additional data tables as they relate to Springettsbury Township, York Township, the region, and the County.

Population baseline and trajectory

Housing Projections, Windsor Township				
	2020 Census	2030 Projection	2040 Projection	2050 Projection
Total Population	17,853	20,531	21,878	23,986
Population Increase		2,678 (15%)	1,347 (6.56%)	2108 (9.64%)
Average Household Size	2.65			
Total NEW Housing Units Needed		1,010.57	508.3	795.47
Total Housing Units - 2020	6,969			

Sources: US Census Bureau - DEC Redistricting Data (P1 and H1), ACS 5-Year Estimates (DP05 and S1101); 2023 PA DEP Population Projections

The table above identifies the Township’s population as of 2020 and the anticipated growth calculated by DEP in 2023. According to DEP’s 2023 projections, the Township could see an additional 6,133 residents, spread over 2020 to 2050. DEP anticipates a population increase of up to 15% between 2020 and 2030, 6.6% between 2030 and 2040, and 9.6% between 2040 and 2050.

This equates to an additional 2,314 housing units by 2050. Consistent with *Surrick’s* three-tier fair-share test (which sets no fixed percentage), planners in Pennsylvania often apply 15% of projected units as multi-family as a defensible benchmark to show non-exclusionary zoning. Windsor Township’s overall housing demand is 2,314, of which 15% or 347 units should be multi-family.

The appendix of this document includes the same tables for Springettsbury Township, York Township, and the Region. The regional housing demand is 7633 additional units by 2050.

Housing Stock and Mix

- Windsor Township’s housing stock is broken down below according to the US Census Bureau’s 2024 American Community Survey (ACS) 5-Year estimates:
 - Single Family Detached – 83%
 - Single-Family Attached – 15%
 - Two Unit Structures – 0.46%
 - Three and Four Unit Structures – 0.79%
 - Five to Nine Unit Structure – 0.79%
 - Ten plus unit structures – 0%

- Approximately 2.04% of the Township’s Housing stock is something other than a Single-family unit on its own parcel.
- Age of housing is weighted to 1990–2009, reflecting rapid suburban buildout; very limited 2010–present (1%) new supply on the ground.

Planning Implications: Windsor is growing, family-oriented, and heavily owner-occupied, with a thin menu of smaller, attainable, and rental options—a classic candidate for missing middle and age-friendly formats in walkable settings.

Housing Costs

When housing construction lags demand, costs rise; Pennsylvania ranked 44th⁵ for adding new homes in 2017–2023 (permits equaled 3.4% of 2017 stock vs. 7.5% nationally), and tracked counties saw rents climb 46% over the same period, evidence that modest, well-placed supply helps contain prices.

In Windsor Township, contracted rents are up 51% (2017–2024) and mortgage costs 6% (2014–2024), while only 1% of the housing stock was built after 2009—a clear indicator that limited new supply is contributing to pressure on costs. A prudent, rural-suburban strategy is to add a limited amount of context-sensitive “missing-middle” housing (townhomes, duplexes, stacked flats, small-lot cottages) in serviced locations—the Cape Horn/Windsor Road corridor and the adjoining Medium Density (R2) Zoning District, paired with a few mixed-use buildings with upper-floor apartments. This approach helps moderate rent/ownership pressure without overextending roads, utilities, or the Township’s rural character.

What formats are currently undersupplied?

- Multi-family scarcity: Small-scale multifamily in the Township equates to 2% of the housing stock; significantly lower than Springettsbury Township (21%), York Township (24%), and the County (14%), suggesting pent-up demand for quality middle housing units (duplexes, triplexes, townhomes, senior cottages).
- The housing supply imbalance creates a lack of “step-in” options for new workers, young households, and downsizing seniors who prefer low-maintenance rentals near services.

⁵ *The Pew Charitable Trusts*, “Pennsylvania’s Lack of Building Has Contributed to Housing Shortage, Hurt Affordability,” Issue Brief, March 12, 2025, <https://www.pewtrusts.org/en/research-and-analysis/issue-briefs/2025/03/pennsylvanias-lack-of-building-has-contributed-to-housing-shortage-hurt-affordability> (accessed January 21, 2026).

Planning Implications: Introducing a broader housing mix in a walkable, service-rich corridor will better meet demographic needs without overloading scattered rural roads.

York County Market Analysis

The following county-level retail, office, and industrial market analysis conversation discusses the demand vacancy, supply, lease rates, and unit sizes as represented in Rock Commercial Real Estate's Q3 and Q4 2025 market reports, which can be found in this document's appendix.

Retail Market Analysis

- Demand (net absorption /leased space).
Retail demand weakened across late 2025, with net absorption negative in both Q3 and Q4 (from -21,548 SF to -32,515 SF, a further -10,967 SF quarter-to-quarter), indicating a net contraction in occupied retail-floor area.
- Occupancy (vacancy).
Vacancy rose slightly from 4.23% (Q3) to 4.29% (Q4), a +0.06 percentage-point change consistent with the negative absorption trend. The absolute rate remains modest, but the direction is unfavorable.
- Supply (inventory).
Total inventory declined slightly from 27.33M SF to 27.30M SF (-30,000 SF), reflecting selective closures, consolidations, or removals from inventory. This minor contraction did not reverse the softening in occupancy or pricing.
- Pricing (asking lease rates).
Average asking rents decreased 8.8% quarter-to-quarter (from \$19.67/SF to \$17.93/SF) and are down 10.4% year-over-year, suggesting landlords are using price to backfill space and that the market is not currently supporting rent growth.
- Space configuration (unit size).
Average retail unit size increased 4.6% year over year, pointing to consolidation into slightly larger suites (or backfilling mid-box (10K to 40K SF) spaces up to 50K SF), while smaller-format leasing underperformed, another indicator of selective rather than expansionary demand.

Planning Implications:

1. No case for additional corridor-wide retail acreage. Expanding retail entitlements now would likely dilute occupancy and depress rents.
2. Right-size to modest, need-based nodes. Focus on neighborhood-serving formats (grocery-anchored convenience, financial and banking, medical/personal services) in one or two compact nodes, not a linear strip.

3. Favor mixed-use ground floors over stand-alone boxes. Require retail as ground-floor space in TND blocks with capped frontages and maximum store sizes to preserve adaptability.
4. Prioritize adaptive reuse and curated pad sites. Reinvest in existing vacant space and limit new pads to essentials (banking, drive-through food, clinics, childcare).

Office Market Analysis

- Demand (net absorption/leased space).
Absorption was negative in both Q3 and Q4 2025, indicating tenants released more space than they took. Leasing activity persisted but shifted toward smaller suites, limiting overall absorption and signaling a recalibration of office needs rather than growth in traditional footprints.
- Occupancy (vacancy).
Vacancy remained below 4% and edged up to about 3.26% in Q4, stable in absolute terms, but with a clear preference for small, flexible suites; medium- and larger-blocks remain slower to lease.
- Supply (inventory).
Inventory held steady at 13.56M SF. Most activity involved renovation and adaptive reuse, reflecting demand for updated, efficient space rather than new single-use office construction.
- Pricing (asking lease rates).
Rents increased modestly in 2025, with the strongest gains in sub-1,000 SF suites (consistent multi-year growth). Larger Class A footprints experienced price stability but slower leasing velocity.
- Space configuration (unit size).
Average leased unit size declined 29% year over year, reinforcing demand for small, flexible suites, coworking configurations, and upper-floor offices in mixed-use environments, aligning with hybrid work norms and cost-sensitive tenant behavior.

Planning Implications:

1. No rationale for large, stand-alone office parks. Broad office entitlements would likely sit underutilized.
2. Meet demand in upper-floor mixed-use space. Encourage second- and third-floor offices over retail along main streets.
3. Design for adaptability. Emphasize easily subdividable, multi-tenant floorplates and reuse of existing buildings.
4. Treat office as a supporting land use. The office should complement housing, neighborhood retail, institutional, and flex-industrial uses—not anchor the corridor.

Industrial Market Analysis

- Demand (net absorption/leased space).
Industrial space continued to be absorbed in late 2025, with positive net absorption in both Q3 and Q4 (from 2,743 SF to 47,390 SF), indicating continued growth in occupied space.
- Occupancy (vacancy).
Vacancy increased slightly from 2.35% to 2.78%, indicating a tight/undersupplied market based on historical and national benchmarks (7–8%), consistent with sustained tenant demand.
- Supply (inventory).
Inventory expanded from 90.21M SF to 92.18M SF on the strength of construction and pipeline activity along the I-83 corridor; this did not materially weaken pricing or absorption, underscoring the market's undersupply.
- Pricing (asking lease rates).
Average asking rents were 11% higher year over year in 2025 (despite a modest Q4 dip), making industrial the best-performing commercial segment on pricing.
- Space configuration (unit size).
Average leased unit size declined 34% year over year, with the majority of 2025 leases under 15,000 SF, a clear shift toward small-bay and flex formats suited to light production, service industrial, and last-mile functions.

Planning Implications:

1. No basis for a single 1,000,000 SF distribution center. A mega-warehouse would concentrate heavy truck traffic beyond corridor capacity and conflict with multimodal/community goals.
2. Plan for a limited, buffered flex-industrial. A modest allocation (40–80 acres) to small-bay/flex in one or two nodes—with buffering and access management—aligns with observed demand while protecting local streets.
3. Integrate with mixed-use; avoid linear industrial zoning. Locate flex nodes adjacent to, not interspersed within, residential and retail areas; maintain clear separations and direct truck routing to arterials.

Summary

- Retail: Right-size to one or two neighborhood-scale nodes; rely on ground-floor mixed-use; prioritize adaptive reuse; phase new space to performance triggers.

- Office: Provide small, flexible, upper-floor suites within mixed-use buildings; encourage renovation/reuse over new stand-alone office; treat office as a supporting land use.
- Industrial: Include a limited, well-buffered flex component (40–80 acres) in one or two nodes; avoid a mega-warehouse; ensure truck routing to arterials and maintain compatibility with adjacent uses.

Taken together, the markets support a housing-led, mixed-use (TND) corridor with neighborhood-scale retail, upper-floor office, and select small-bay flex industrial—not a large, single-use commercial or logistics district. This approach aligns zoning with actual demand, protects corridor mobility, and supports fiscal resilience.

Transportation Analysis

Current ADTs on State Roads

	Average Daily Traffic (ADT)	Average Daily Truck Traffic (ADTT)	Truck %
Cape Horn Road (SR 0024) (N of Windsor Rd)	32,202	4,223	13%
Cape Horn Road (SR 0024) (S of Windsor Rd)	13,718	635	5%
Windsor Road (SR 2031)	7,243	362	5%
Lombard Road (SR 2007)	8,055	161	2%
Freysville Road (SR 2009)	9,034	452	5%
Camp Betty Washington Road (SR 2005)	5,895	237	4%

Source: PennDOT Roadway Management System (RMS)

Finding 1 - Cape Horn Road (SR 24) Already Carries Very Heavy Traffic

- 32,202 ADT north of Windsor Road and 13,718 ADT south of Windsor Road indicate a major volume imbalance and confirm that the northern leg of SR 24 functions as a primary regional arterial.
- The 13% truck share north of Windsor Road (4,223 trucks per day) is exceptionally high for a mixed-use corridor and already approaching thresholds where traffic noise, turning movements, and safety conflicts become prominent.
- Historic traffic data show significant growth: SR 24 north of Windsor Road has increased from 20,629 (2000) to 27,899 (2021), and now 32,202, meaning the corridor has experienced over 50% growth in 25 years.

Planning Implications: SR 24 is already strained, operating as a regional connector rather than a local commercial street. Any land-use changes must consider its limited remaining capacity and high truck share.

Current ADTs for Local Roads

	Average Daily Traffic	Average Daily Truck Traffic (ADTT)	Truck %
Ruppert Road (T-751)	509	36	7%
Belle Road	553	31	10%

Source: PennDOT Roadway Management System (RMS)

Finding 2 - Supporting Roads Have Moderate but Rising Traffic and Truck Volumes

- Windsor Road (SR 2031) carries 7,243 ADT with a 5% truck share, showing that it is already absorbing spillover traffic from SR 24.
- Freysville Road (9,034 ADT, 5% truck) and Lombard Road (8,055 ADT) serve as an east–west connector, dispersing traffic toward US-30 in Hellam or toward Red Lion.
- Local roads like Ruppert Road (509 ADT) and Belle Road (553 ADT) show unexpectedly high truck percentages (7–10%), indicating trucks are already using inappropriate paths to navigate the area.

Planning Implications: Even the “local” network is already shouldering more cut-through or diversion traffic than intended, raising concerns about safety, speeding, and neighborhood livability.

Historic AADTs on State Roads

	2000	2010	2021
Cape Horn Road (SR 0024) (N of Windsor Rd)	20,629	21,353	27,899
Cape Horn Road (SR 0024) (S of Windsor Rd)	15,295	18,552	15,663
Windsor Road (SR 2031)	6,872	8,808	8,238
Lombard Road (SR 2007)	6,173	9,098	7,436
Freysville Road (SR 2009)	5,672	9,198	10,504
Camp Betty Washington Road (SR 2005)	2,410	7,061	5,441

Source: PennDOT Roadway Management System (RMS) Historical AADT

Crash Data

The following table lists reportable crashes recorded in the Pennsylvania Crash Information Tool (PCIT) from January 2015 to December 2024, the ten most-recent years of available data. A reportable crash is any crash that requires at least one vehicle to be towed from the scene or that results in at least one reported injury. Simple fender-benders are not considered reportable crashes in Pennsylvania. No fatalities were recorded during this time period. The search parameters include all crashes within 500 feet of an intersection listed in the table below:

	Total Number of Crashes	Total Number of Injuries
Cape Horn Road and East Prospect Road	82	43
Cape Horn Road and Windsor Road	39	30
Cape Horn Road and Belle Road	13	8
Cape Horn Road and Ruppert Road	10	4
Cape Horn Road and Lombard Road	76	40
Windsor Road and Freysville Road	35	9
Windsor Road and Ruppert Road	15	6

Source: Pennsylvania Crash Information Tool (PCIT)

Where the harm concentrates:

- Cape Horn Road at East Prospect Road and Cape Horn Road at Lombard Road account for 58% of all crashes and 59% of all injuries
- Cape Horn Road at Windsor Road adds another 14% of crashes but 21% of injuries, meaning three junctions on Cape Horn Road produce 72% of crashes and 81% of injuries across the study set.

Even within an already high-burden corridor, Cape Horn Road at Windsor Road stands out for injury likelihood per crash (77%).

Planning Implications: 73% of the crashes and 81% of the injuries happen at three intersections with Cape Horn Road: East Prospect Road, Windsor Road, and Lombard Road. Targeting safety improvements at these intersections will result in the highest return on safety investment.

Trip Generation

Warehouse Development

The Institute of Transportation Engineers (ITE) Trip Generation Manual, 11th Edition, estimates that a 1,000,000-square-foot warehouse (Land Use Code (LUC) 150)⁶ will produce 1,618 vehicle trips per day on an average weekday. Of these trips, approximately 34% are expected to be truck trips, with 547 per average weekday. Vehicle trips consist of all commuters, visitors, deliveries, and departures, including freight traffic and last-mile deliveries.

It's estimated that all truck traffic will travel north on Route 24 to access I-83 at Mt Rose Avenue or US-30 at Mt. Zion Road. A truck route⁷ should be established to legally enforce these routes and prevent trucks from using other roads to access I-83 and US-30.

Unlike truck traffic from a warehouse development, vehicular trips have the potential to increase traffic volumes in almost every direction. The new vehicle trips will spread south to Red Lion Borough and Windsor Commons; north to East York; west on Belle Road to Camp Betty Washington and Springwood Roads to Queens Gate; and east to US 30 to Lancaster County via Dietz Road, Mountain Road, East Prospect Road, to Freysville Road.

⁶ Land Use Code 150 is the best-fit for a Logistics-Related facility, and should be used for any distribution center, fulfillment center, cross-dock, parcel hub, last-mile facility or warehouse use focused on receiving, sorting, staging, and shipping goods.

⁷ Pennsylvania Municipalities have the right to restrict trucks on their roadways per 75 Pa. C.S. §4902. However, PennDOT must approve and install the approved "Truck Route" signage on its roadways.

Finding 3 - A Warehouse Development Would Generate Heavy Truck Traffic in One Direction

ITE projections show a 1,000,000 sq. ft. warehouse would add:

- 1,618 new vehicle trips/day
- 547 new truck trips/day (34%) and nearly all trucks would travel north on SR 24 toward I-83 or US-30.

Even with an enforced truck route, this would:

- Push SR 24's truck share far above 13%
- Increase congestion at the Mt. Rose Ave interchange (I-83) and Mt. Zion/US-30 access points
- Increase conflicts at corridor intersections, especially unsignalized driveways

Planning Implications: The corridor cannot absorb warehouse-level truck volumes without substantial operational changes and public resistance.

TND Development

To estimate a potential unit count and retail square footage for the TND, we looked at comparable nearby TNDs:

- Walden (Silver Spring Township, Cumberland County)
 - 300 acres
 - ±900+ residential units
 - 20–40k sq ft commercial footprint
 - 3 DU/acre
- Arcona (Lower Allen Township, Cumberland County)
 - 150–200 acres
 - ±600–700 units
 - 20–50k sq ft retail
 - 3.5–4.0 DU/acre.
- Winding Hills (Upper Allen Township, Cumberland County)
 - 350 acres
 - ±1,100 units
 - No Commercial mixed-use
 - 3.1 DU/acre.
- North Cornwall Commons (North Cornwall Township, Lebanon County)
 - 81 acres
 - 680 units (mix of apartments & townhomes)
 - 100k sq ft of commercial
 - 8.4 DU/acre

- Richmond Square (Manheim Township, Lancaster County)
 - 6.25 acres
 - 36 units
 - 30,000 square ft of commercial
 - 5.76 units/acre

Using these Central PA examples, we can determine that a TND proposed on 229 acres in Windsor Township may have:

- Low End TND Projection:
 - 650-750 dwelling units
 - 25-60K commercial Square feet
- Medium TND Projection:
 - 1,000-1,300 dwelling units
 - 75-150K commercial space
- High End TND Projection:
 - 1,700-1,900 dwelling units
 - 150-250K commercial space

Using these projections, we can determine the potential traffic impact for the low, medium, and high-end predictions for:

- Shopping Plazas (LUC 821),
- Single-Family Detached Housing (LUC 210),
- Multifamily Housing (Low-Rise) (LUC 220), and
- Low-Rise Residential with Ground-Floor Commercial (LUC 230).

Potential New Dwellings Units and Retail Square Footage for a Potential TND, Compared to existing TNDs in Central Pennsylvania.					
	Total DUs	SF Units (LUC 210) (40%)	MF Units (LUC 220) (15%)	MF Units (LUC 230) (45%)	Retail SF
Low	700	280	315	105	45,000
Medium	1,150	460	518	172	112,500
High	1,800	720	810	270	200,000

Source: Central Pennsylvania Business Journal, Cumberland County, Bennet Williams, and North Cornwall Commons

Average Weekday Daily Traffic (AWDT)					
	SF Units (LUC 210) (40%)	MF Units (LUC 220) (15%)	MF Units (LUC 230) (45%)	Retail (LUC 821)	Total AWDT
Low	2,640	708	1,084	4,252	8,684
Medium	4,338	1,163	1,780	10,630	17,911
High	6,790	1,820	2,786	18,898	30,294

Source: Institute of Transportation Engineers (ITE) Trip Generation Manual, 11th Edition

Finding 4 - A TND Would Generate Fewer Trucks but Widespread Vehicle Impacts in All Directions

Based on TND projections of a 229-acre site:

- Low-range TND: 8,684 new trips/day
- Medium: 17,911 new trips/day
- High: 30,294 new trips/day

Trip distribution is multidirectional:

- South to Red Lion / Windsor Commons
- North to East York
- West to Queensgate
- East toward US-30 via Freysville Rd, Mountain Rd, Dietz Rd

Planning Implications: A TND produces far fewer trucks than a warehouse, but significantly more total trips, putting stress on:

- The Cape Horn/Windsor Road intersection
- Local collectors (Belle, Freysville, Camp Betty Washington, Mountain Rds)
- School bus routing and pedestrian crossings
- Side-street delay and left-turn movements

Most importantly, a TND can utilize complete street principles and capitalize on walkability, bike accessibility, and pedestrian-scale infrastructure and architecture to make the site a destination rather than just another residential neighborhood or shopping center.

Destination and Origination of Trips

Looking at York County Commuting data, 6.2% of all York County workers commute to Lancaster County, 7.2% commute to Cumberland or Dauphin Counties, and 0.8% commute south to Baltimore County or City. With these commuting trends in mind, we can predict similar percentages of new residents will commute to similar locations.

County	Count	Share	Direction
York County	187,332	60.9%	N/A
Lancaster County	114,018	6.2%	E
Adams County	11,587	5.8%	W
Cumberland County	7,586	4.0%	N
Dauphin County	6,087	3.2%	N
Franklin County	2,575	1.4%	W
Berks County	2,404	1.3%	E
Philadelphia County	1,952	1.0%	E
Lebanon County	1,777	0.9%	N
Chester County	1,709	0.9%	E
Baltimore County	1,279	0.7%	S
Baltimore City	250	0.1%	S

Source: US Census Bureau

For the 60.9% of York County commuters who live and work in York County, we can expect most to work in established commercial or industrial areas, such as East York, West York, Emigsville, or Hanover. Like industrial truck traffic, these commuters will likely follow Mt Zion Road and Mt Rose Avenue to US-30 and I-83.

Finding 5 - Local and Regional Commuting Patterns Suggest Significant Outbound Peak Flows

York County commuting data show that 39% of workers leave York County for work, with notable flows toward:

- Lancaster County (6.2% eastbound)
- Cumberland & Dauphin Counties (7.2% northbound)
- Adams County (5.8% westbound)
- Baltimore region (0.8% southbound)

The remaining York County commuters who travel outside of the County include small percentages to numerous destinations beyond neighboring Counties.

Planning Implications: New residents in the corridor will generate outbound AM peak-hour surges primarily north (to US-30 and I-83), and south (to Red Lion), amplifying existing congestion patterns.

Overall Transportation Concerns for the Corridor Study

1. SR 24 is already overburdened
High ADTs, high truck shares, and long-term volume growth indicate limited remaining capacity and a high risk of conflict.
2. A warehouse would overwhelm the corridor with trucks.

Truck volume increases would be concentrated rather than diffused, heightening safety issues.

3. A TND creates a different problem: many more total trips
Though more neighborhood-friendly, a TND would require intersection upgrades, access management, multimodal improvements, and improved local street connectivity to disperse traffic.
4. Local roads already experience higher truck percentages than expected.
This is a warning sign that truck restrictions and enforcement may be necessary regardless of which land-use alternative is chosen.
5. Regional commuting patterns amplify directional peak demands.
Corridor changes must consider peak-direction congestion—not just daily totals.

Overall Trip Impact

No matter what use is ultimately approved for the site, the largest transportation impact will be felt along Cape Horn Road north of Windsor Road to East Prospect Road (SR 0124). This section of roadway was widened in about 2015 and already handles over 32,000 vehicles a day. The level of service (LOS) will decrease, which may encourage motorists to take other streets, thereby increasing congestion and delays on other roads such as Camp Betty Washington Road and Chambers Road. However, the primary benefit of TNDs is that some trips will be eliminated due to the development's commercial or mixed-use character. If a café, pharmacy, or small business opens up at the site, the new residents will be able to walk for these trips and will not need to drive to East York or Windsor Commons, which can reduce traffic on Cape Horn Road. In addition, the increased population and commercial uses along Cape Horn Road may make a new transit route feasible along the corridor from Red Lion to East York, as outlined in the 2017 Transit Development Plan, providing a new transportation option that can reduce traffic and congestion on the corridor.

Summary

The transportation data shows that any future development of the 229 acres must address real, pre-existing congestion and truck routing issues on SR 24, while also planning for safe local circulation.

A mixed-use TND is more compatible with the local road network than a logistics warehouse but will still require significant mitigation at key intersections and along secondary streets.

Conclusion – Suggested Strategy

Housing-Led, Walkable Mixed-Use TND Spine With Targeted Employment

Windsor Township’s long-term housing need, approximately 2,314 new homes by 2050, requires a strategic, place-based approach that adds housing in the right locations while protecting the Township’s rural character. The Cape Horn Road/Windsor Road Corridor is the most appropriate area to accommodate a meaningful share of this growth, given its existing zoning, roadway access, and proximity to utilities and services.

1. Housing Allocation Framework

To align land use with projected demand, the corridor is recommended to absorb approximately 35–45% of the Township’s total housing need. This equates to 810–1,040 new homes located within the 229-acre General Commercial district, which is already zoned for development but presently used largely for agriculture. This scale of housing supports walkability, sustains neighborhood-serving retail, and creates a coherent mixed-use center without overwhelming local streets or utilities.

The remaining 1,300–1,500 units can be delivered through:

- The 100 acres of Medium-Density zoning adjacent to the corridor, and
- Vacant and agricultural lands in the Rural Residential, Low Density Residential, and Medium Density Residential Zoning Districts, and
- Incremental infill within existing zoned neighborhoods.

This balanced distribution allows the Township to meet demand while preserving rural landscapes outside the growth area.

2. Recommended Housing Mix

A walkable, mixed-use Traditional Neighborhood Development (TND) should incorporate a diverse mix of housing types:

- 40–50% Townhomes & Stacked Townhomes
Attainable for first-time buyers and young families.
- 25–35% Apartments (3–4 stories; some over retail)
Suitable for workforce housing, seniors, and residents who prefer low-maintenance living.
- 15–25% Small-Lot Single-Family Homes / Cottage Courts
Appropriate for downsizing households and aging-in-place.

This mix increases the Township’s supply of middle housing, which is currently limited under existing zoning but essential for affordability and demographic diversity.

3. Neighborhood-Scale Commercial Nodes

Commercial uses should be consolidated into one or two compact nodes (10–20 acres total), not spread across the corridor as strip development. Nodes should contain:

- Daily-needs retail (e.g., small grocer, personal services, medical offices)
- Upper-floor residential or office space
- Civic uses (library, daycare, community space)

This pattern aligns with market conditions and prevents over-zoning for retail in an era of selective demand and declining performance of large-format retail.

4. Targeted Employment Areas

To support a balanced tax base and align with county-wide industrial trends, the corridor should include a modest amount of small-bay flex or clean industrial space:

- 40–80 acres total, organized in one or two buffered pods
- Direct access to SR 24 for trucks
- Clear truck routing to prevent impacts on residential streets

This approach captures local employment demand without introducing large distribution facilities that would overwhelm intersections or add heavy truck traffic.

5. Planning Rationale

This strategy ensures that Windsor Township:

- Meets its 2,314-unit housing need in a managed, phased, and resilient manner
- Adds new housing where infrastructure already exists
- Reduces growth pressure on agricultural districts
- Creates a walkable, mixed-use center that supports local services
- Integrates small-bay employment without compromising neighborhood character
- Aligns land use with transportation capacity and safety improvements

6. Conceptual Land Budget for the 229-Acre Corridor

The following allocation supports 810–1,040 residential units:

<u>Land Use Component</u>	<u>Estimated Acres</u>	<u>Purpose</u>
Residential TND Blocks	160–190 acres	Produces 810–1,040 homes at 4–6 du/ac corridor-wide
Mixed-Use / Main Street	25–35 acres	Ground-floor retail, upper-floor apartments, civic uses
Flex / Clean Industrial	40–80 acres	Small-bay employment with buffers and controlled access
Parks / Stormwater / Schools / Greenways	30–45 acres	Supports walkability, recreation, water management, and community services

Final yields depend on environmental constraints, access spacing, infrastructure phasing, and detailed block design.

Appendix

Zoning Analysis and Existing Land Use

Appendix 5-A

Fair Share Analysis

The Basic Concept of Fair Share

The 1988 amendments to the Pennsylvania Municipalities Planning Code (MPC) require that through zoning, each municipality provide "...for residential housing of various dwelling types encompassing all basic forms of housing, including single family and two family dwellings, and a reasonable range of multiple family dwellings in various arrangements..." (MPC Section 604.4). This amendment stemmed from the judicial determination that local governments are required to plan for and implement land use regulations that meet the legitimate needs of the range of people who may desire to live in the community. In spite of this "fair share" mandate, however, the Pennsylvania Legislature has not specified the necessary amount of any residential use, nor has the legislature offered guidance for a municipality to determine if it has met its obligation to provide for each residential use.

The courts, however, have been more instructive on how a community may determine if it has met its fair share obligations. In 1977, the Pennsylvania Supreme Court decided the landmark case, *Surrick v. Zoning Hearing Board of Upper Providence Township* 776 Pa. 182, 382 A.2d 105, which laid out an analytical "fair share" test, or methodology, to help determine if a municipality is allowing only a token provision of a residential housing type, particularly multi-family dwellings¹, or whether a municipality is meeting its fair share obligation. The process by which to determine if a municipality has met such a responsibility is termed a "fair share" analysis. A fair share analysis attempts to assess, based on available information, whether a municipality is providing for its "fair share" of all housing types, particularly multi-family housing, and whether the municipality is attempting to meet its obligation to accommodate future growth.

This fair share analysis considers the availability of land and the provision for multi-family housing from several different perspectives to ensure the Oxford Region has designated a reasonable amount of land for multi-family dwellings, based upon the Land Use Plan recommendations. (See Chapter 5: Land Use) The analysis is intended to prevent the Region from directly or indirectly excluding any common form of residential housing, particularly multi-family housing from within its borders.

¹ Note that in the context of this fair share analysis, the term "multi-family" means any housing type of three (3) or more dwelling units, including but not limited to townhouses, quadruplexes and apartments. The definition does not include twins or two-family units. This distinction is based on the MPC language in Section 604(4) which supports distinguishing 2-family homes from structures with 3 or more dwelling units.

The Fair Share Test

The fair share analysis is comprised of a three-tier test laid out by the *Surrick* Court. This test is not appropriate if a municipality or region completely excludes multi-family housing. A zoning ordinance that completely excludes a type of residential use will be found invalid. Rather, the fair share test is to determine if the amount of multi-family units provided for is token or “de facto” exclusionary (permitted as a specific use, but does not allocate sufficient land for that use or otherwise negates the actual provision of the use).

While the case law following *Surrick* has provided some general principles of law, neither the courts nor the legislature has developed clear standards for meeting fair share. Indeed, even with the three-tier *Surrick* fair share test, “the question of whether or not a zoning ordinance is exclusionary in its effect...always depends on the unique facts in each case and, thus, can only be decided on a case-by-case basis.”² Notwithstanding the individual nature of each municipality, the courts have established the following tiers for determining if a municipality is providing for its fair share obligation:

- Tier 1** Is the Region a logical area for population growth and development? (i.e., is it in the path of growth?)
- Tier 2** Is the Region a developed or developing community?
- Tier 3** Is the amount of land available for multi-family development disproportionately small, in relation to population growth pressure and present level of development?

Tier 1 - Path of Growth *Is the Region in the Path of Growth?*

The first tier of the *Surrick* test examines whether a community is a logical area for development and population growth or “in the path of growth.” There are several factors to consider in determining whether the Oxford Region is in the path of growth. The Region’s past and projected population is a factor in the Tier 1 analysis. Another growth factor is the transportation network and accessibility to the Region and surrounding area. The Region’s proximity to a larger metropolitan region or fast growing areas is another consideration.

The Oxford Region is a logical area for population growth and development. In terms of the Region’s location, development history, and growth patterns, the Region is in the path of growth. Table 1, below shows a steady increase in population over the last fifty years. This growth is most significant in the last decade of the last century when the Region’s population grew by 4,563 residents or 29% (1990-2000). The growth rate continued at a similar rate of 27% between 2000 and 2010. Based on current population projections, this growth is expected to continue, although at a slower rate. In terms of location, the Region is accessible from U.S. Route 1, an interstate highway that serves to link Philadelphia to Baltimore and areas further

² *Kaiserman v. Springfield Township*, 22 Pa. Cmwlth. 287, 348 A.2d 467 (1975) at 470.

north and south and State Routes 896, 10, 472, 272, and 842 that provide access to the surrounding region.

Conclusion: Based on the above analysis, the Oxford Region is located in the path of growth.

**Table 1: Population Trends
Oxford Region, 1960-2030**

Year	Population	Numeric Increase	Percent Increase
1960	10,354	-	-
1970	12,089	1,735	17%
1980	13,659	1,570	13%
1990	15,801	2,142	16%
2000	20,364	4,563	29%
2010	25,814	5,450	27%
2020*	28,157	2,343	9.0%
2030*	32,186	4,029	14.3%

Source: U.S. Census Bureau (1970-2010); *2020 and 2030 Projections (DVRPC, 2012)

Tier 2 - Present Level of Development *Is the Region Developed or Developing?*

The second tier of the fair share analysis looks at the present level of development within the Region. The following key factors should be examined to help make this determination. (See Table 2 for a summary of the Tier 2 analysis.)

- A. The percentage of **remaining developable land**, which essentially shows the degree to which the Region is “built out.”
- B. Existing and **potential multi-family** housing units and projected housing needs.
- C. The **amount of land available** for multi-family development.

A. Developable Land Remaining in the Oxford Region

Based on the developable land analysis (See Chapter 5, pg. 5-8), approximately 20,807 acres or 42% of the Region is potentially developable. Developable land is defined as land that is not naturally constrained, protected through easements or some other mechanism, or already developed. Courts have held that, until a community is almost fully developed (i.e., 95% plus), it is still a developing community and, therefore, is still obligated to provide for its fair share of multi-family housing.

Conclusion: With 42% of its land area potentially developable, Oxford Region is considered a developing community.

B. Existing and Potential Multi-Family Units and Projected Housing Needs

There are two basic factors that should be reviewed when considering existing and projected housing stock: 1) current multi-family units as a percentage of all housing; and 2)

number of housing units (both single and multi-family) needed to accommodate the projected population. These factors are explored below.

B.1 Current Multi-Family Units as a Percentage of Existing Housing Stock The amount of multi-family housing currently on the ground offers the Region a snapshot of its current mix of housing, what the market has thus far dictated, and is a consideration in assessing where the Region stands in meeting its fair share obligation. While market factors (in addition to zoning) drive what type of housing is built, the current ratio of multi-family housing to all other residential housing types gives some insight into whether the Region has been accommodating its share of multi-family housing, and how much more, ultimately, at build-out the Region should accommodate.

According to the 2006 – 2010 American Community Survey (U.S. Census Bureau), the Oxford Region had 1,255 multi-family units in 2010. Therefore, approximately 15.7% of the housing stock in the Oxford Region consisted of multi-family units.

Conclusion: The percentage of multi-family units in the Oxford Region as of 2010 is generally consistent with the 15% fair share benchmark (see B.2.b for explanation of this benchmark). This indicates that the Oxford Region has been accommodating its fair share of multi-family units.

Table 5A-1: Potential Future Development by Land Use Plan Categories and Map

Land Use Category		Density ³ Range	Developable Lands in Category	Reduction for Infrastructure (15%)	Net Developable Land in Acres	Potential Residential Units
Resource Protection Areas						
Agricultural		1 du/5 acres	10,416	1,562	8,854	1,770
Rural		1 du/2 acres	5,928	889	5,039	2,520
Village		2 du/acre	158	24	134	268
Designated Growth Areas						
Residential	Suburban	1 du/acre	2,302	345	1,957	1,957
	Town Center	6 du/acre	6	1	5	30
	Town Res.	3 du/acre	120	18	102	306
	Village Ctr.	8 du/acre	287	43	244	1,952
Total Potential Units in Designated Growth Areas						4,245
Total Potential Units in all land use categories above						8,803
Commerce		1 du/acre	1,590	239	1,351	1,351

Source: Oxford Region Future Land Use Map/Designations and Municipal Ordinances,

³ Where a range of densities has been provided in the Land Use Plan, the density used represents a median density.

B.2 Needed and Potential New Multi-Family Units

B.2.a Multi-Family Units Needed to Accommodate Projected Population

The number of multi-family units needed to accommodate the projected population to 2020 is the first factor to consider in terms of potential multi-family units. According to the information in Table 6-B (Chapter 6, pg. 6-4), **770** new homes will be needed in the Region to accommodate the projected population growth to 2020. A review of Pennsylvania case law indicates that planning for at least **15%** of these projected units to consist of multi-family units should fall within the parameters of the fair share test. Therefore, of the approximately 770 total housing units needed to accommodate the Region's projected population to the year 2020, the Region should allow for a potential minimum of **121** additional **multi-family units**.

This analysis only considers the new multi-family housing units possible in the Suburban (S), Town Center (TC), Town Residential (TR), and Village Center (VC) designations of the Land Use Plan (Chapter 5), as they are the residential designated growth areas. Within the S, TC, TR, and VC land use categories, based on the Potential Residential Units shown in Table 5A-1, the Region can accommodate an additional **4,245** housing units. **Any or all** of those could be multi-family units based upon future land use policies and projected densities. If the current ratio of multi-family units as a percentage of existing house stock (15.7%) is continued with future development that would yield **665** multi-family units.

Conclusion: Based on the above analysis, the Oxford Region can accommodate projected multi-family housing needs through the time horizon of the land use plan.

B.2.b. Percentage of Multi-Family Units at Build-out

The potential percentage of multi-family in relation to other types of housing at build-out is examined in this portion of the analysis. The courts have upheld different percentages of multi-family units at build-out as satisfying fair share obligations as they determine fair share obligations on a case-by-case basis. Based on review and interpretation of this case law, it is recommended that the Oxford Region **allow for 15 to 20 percent** of all units to be multi-family at build-out.

Based on the information in Table 5A-1, at build-out the potential percentage of multi-family units in the Region (excluding the Commerce land use category) is estimated to be 32.7% (5,500 multifamily units out of 16,785 total units⁴). This exceeds the 15 to 20 percent recommended range. It is difficult, however, to predict with much certainty the percentage of multi-family units at build-out because there are many market factors which will determine what type of housing is built. Therefore, while an initial conclusion may be that the Region is "over allowing" for multi-family housing the reality is that market factors may produce a smaller percentage of that number.

⁴ 7,982 existing units + 8,803 additional = 16,785 total possible units; 1,255 existing + 4,245 additional = 5,500 total possible multifamily.

However, it is not unreasonable to project that an additional 1,425 units could be accommodated within the S, TC, TR, and VC land use designations.

Conclusion: Under a build-out scenario, the Oxford Region allows for a reasonable mix of multi-family versus single-family units.

C. Amount of Land Available for Multi-Family Dwellings

The amount of land available for multi-family dwellings is the final consideration under this tier of the fair share analysis. The courts have not specifically defined the term “available” as used in *Surrick*. While the courts may have assumed a general definition of the word, and intended it to mean developable land only, the cases include discussions on total lands whether already developed or not. Because of this discrepancy, this analysis uses two approaches in determining how much land is available for multi-family development. These approaches are based on review and interpretation of the fair share case law.

The two approaches, described below, primarily differ in how they define “available” land:

C.1 Approach 1 - “Developable Lands”

This approach to determining how much land is available for multi-family housing includes only developable lands; i.e., those lands that have not already been developed in the S, TC, TR, and VC designations and that are not protected or naturally constrained. This definition of “available” lands is considered the more conservative of the two approaches and is probably the most relevant in a community like the Oxford Region which has a significant amount of developable land remaining (42%).

The Oxford Region Land Use Plan (Chapter 5, pg. 5-11) designates 2,308⁵ acres or 11% of all developable lands in the Region for multi-family development. While the case law does not prescribe a set percentage of land for multi-family use, when using the more conservative “developable lands” approach, the percentage of land designated for multi-family uses should ideally equal **at least five percent and no less than four percent**.

Conclusion: The Oxford Region provides an adequate amount of developable lands for multi-family housing.

C.2 Approach 2 - “Total Lands”

This approach to determining how much land within the Region is available for multi-family housing includes all lands designated for multi-family uses, including developed, developable, constrained, and protected lands. This approach is the less conservative of the two because it includes already developed areas and land that cannot be further developed.

⁵ Developable acres in the S, TC, TR, VC future land use designations.

The Oxford Region (S, TC, TR, and VC) designates 8,540 acres⁶ or 16% of its total lands for multi-family development. In the case of the less conservative “total lands” approach, it is recommended that at least **seven percent** of the land be designated for multi-family uses.

Conclusion: As demonstrated by the numbers above, the Oxford Region provides an adequate amount of total lands for multi-family housing.

Table 5A-2: Summary of Fair Share Analysis Results

Section Reference	Description	Acres/Units/Percent	
A.	Developable Land Remaining in Region:		
	Total acres of developable land and percentage of developable land	20,807 acres 42 percent	
B.	Existing Multi-Family Units:		
B.1	Current multi-family units as a percentage of existing housing stock	1,255 mf/7,982 all units 15.7% mf units	
B.2	Additional housing units of all types needed to accommodate projected population growth to 2030.	770 units	
B.2.a	Estimated number of potential new multi-family units	4,245 mf units	
B.2.b	Total housing units of all types possible under the future land use categories at build-out	16,785 units	
B.2.b	Total multi-family units possible at build-out (Recommended minimum - 15% to 20% of total possible units)	5,500 mf units 32.7% mf units	
C.	Percentage of Land Available for Multi-Family Development:		
C.1	Developable land designated for multi-family units (Recommended minimum - 5% of developable land)	Acres	Percent
		2,308	11%
C.1	Total land designated for multi-family units (Recommended minimum - 7% of total land)	8,540	16%

Source: CCPC, 2012

Tier 3 - The Extent of Any Exclusion

Is the amount of land available for multi-family development disproportionately small in relation to population growth pressure and present level of development?

The third tier of the fair share analysis is to determine the extent, if any, of the exclusion of multi-family housing in the Region. It is a balancing test, in essence, to determine if the amount of land designated for multi-family development is disproportionately small, in relation to population growth pressure and present level of development. To do so, it is necessary to consider the percentage of land available under the future land use categories for multi-family dwellings in light of the current population growth pressure and in light of the total amount of developable land in the Region.

⁶ Total acres in the S, TC, TR, VC future land use designations.

Conclusion: As demonstrated by the number of units and percentages of land (both developable and total) and the population growth pressure in Tier 2, there is no exclusion of multi-family housing in the Region and the proposed Future Land Use Plan adequately accommodates future residential housing needs of all types.

Demographic and Housing Analysis

Housing Projections, Windsor Township				
	2020 Census	2030 Projection	2040 Projection	2050 Projection
Total Population	17,853	20,531	21,878	23,986
Population Increase		2,678 (15%)	1,347 (6.56%)	2,108 (9.64%)
Average Household Size	2.65			
Total NEW Housing Units Needed		1,010.57	508.3	795.47
Total Housing Units - 2020	6,969			

Sources: US Census Bureau - ACS 5-Year Estimates (S1101), DEP Population Projections

Housing Projections, Springettsbury Township				
	2020 Census	2030 Projection	2040 Projection	2050 Projection
Total Population	27,058	28,817	29,794	31,218
Population Increase		1,759 (6.5%)	977 (3.39%)	1,424 (4.78%)
Average Household Size	2.45			
Total NEW Housing Units Needed		717.96	398.78	581.22
Total Housing Units - 2020	9,787			

Sources: US Census Bureau - ACS 5-Year Estimates (S1101), DEP Population Projections

Housing Projections, York Township				
	2020 Census	2030 Projection	2040 Projection	2050 Projection
Total Population	29,719	32,919	35,391	38,279
Population Increase		3,200 (10.77%)	2,472 (7.51%)	2,888 (8.16%)
Average Household Size	2.3			
Total NEW Housing Units Needed		1,391.30	1,074.78	2,646.96
Total Housing Units - 2020	5,113.04			

Sources: US Census Bureau - ACS 5-Year Estimates (S1101), DEP Population Projections

Housing Projections, Region				
	2020 Census	2030 Projection	2040 Projection	2050 Projection
Total Population	74,630	82,267	87,063	93,483
Population Increase		7,637 (10%)	4,796 (6%)	6,420 (7%)
Average Household Size	2.47			
Total NEW Housing Units Needed		3,091.90	1,941.70	2,599.19
Total Housing Units - 2020	10,724.69			

Sources: US Census Bureau - ACS 5-Year Estimates (S1101), DEP Population Projections

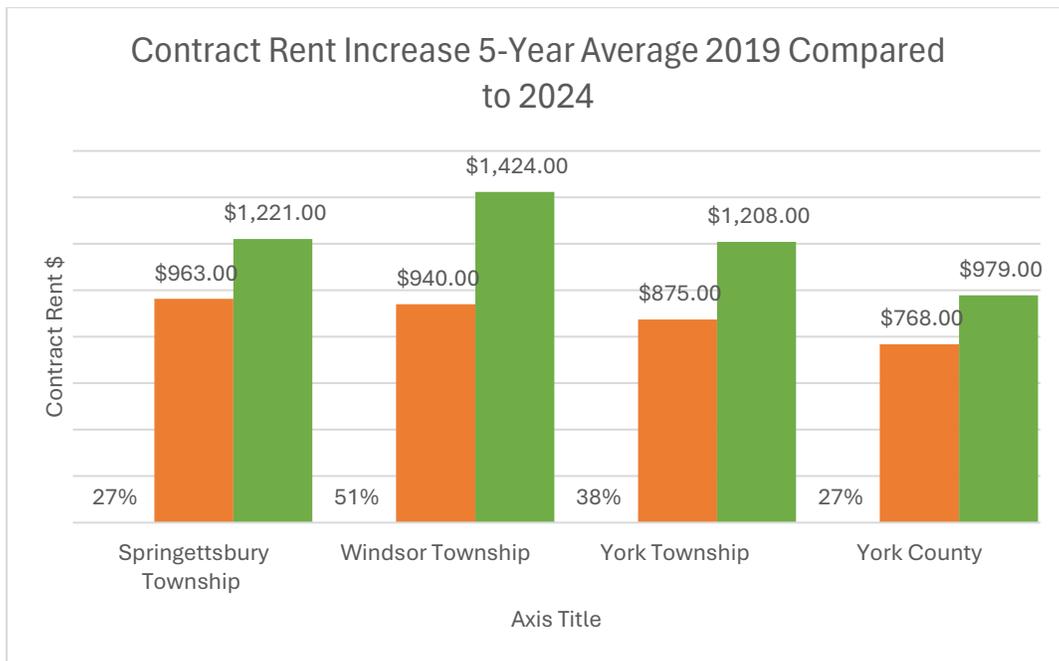
Year Structure Built			
Years	Windsor Township	Springettsbury Township	York Township
1939 or earlier	7%	8%	4%
1940-1949	1%	5%	3%
1950-1959	8%	21%	11%
1960-1969	5%	17%	9%
1970-1979	13%	14%	15%
1980-1989	8%	14%	11%
1990-1999	26%	13%	21%
2000-2009	30%	6%	20%
2010-2019	1%	3%	2%
2020 or later	0%	1%	4%
TOTAL	100%	100%	100%

Source: US Census Bureau (Table B25034 ACS 5-Year Estimate 2020)

Regional Housing Stock, 2024

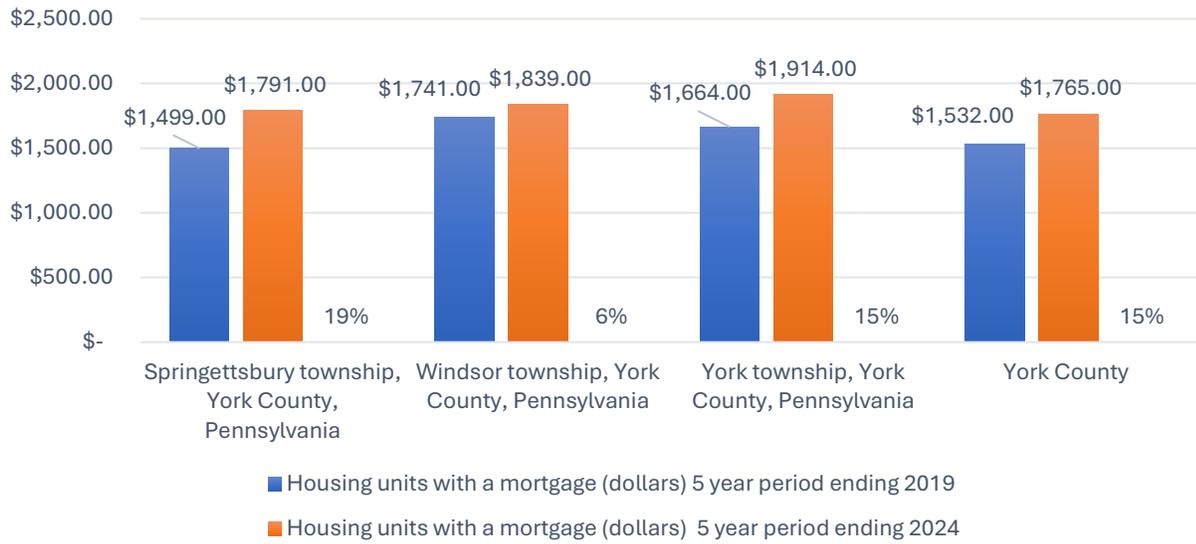
	Single Family Detached	Single Family Attached	2 Apartments	3-4 Apartments	>5 Apartments	Total	% of Regional Housing Stock
Windsor Township	5,283 (83%)	985 (15%)	30 (0%)	51 (1%)	51 (1%)	6,400	22%
Springettsbury Township	6,801 (67%)	1,162 (11%)	78 (1%)	442 (4%)	1639 (16%)	10,122	35%
York Township	7,168 (56%)	2,450 (19%)	434 (3%)	605 (5%)	2059 (16%)	12,716	43%
Region	19,252 (66%)	4,597 (16%)	542 (2%)	1,098 (4%)	3,749 (13%)	29,238	100%
York County	118,399 (65%)	30,937 (17%)	5,305 (3%)	6,362 (4%)	13,263 (7%)	181,583	-

Source: US Census Bureau (Table S2504 ACS 5-Year Estimate 2024)



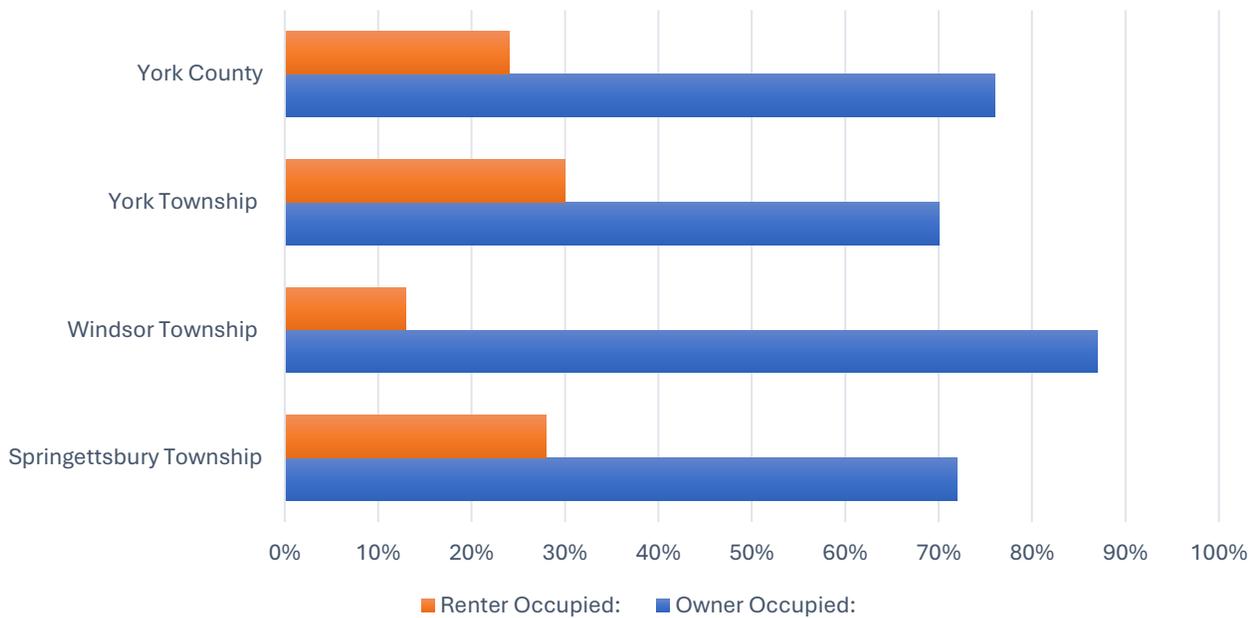
Source: US Census Bureau (Table B25058 5-year estimates 2019 and 2024)

Regional Median Household Costs 5-Year Average 2019 Compared to 2024



Source: US Census Bureau (Table B25088 5-year estimates 2019 and 2024)

Housing Tenure Type 2024



Source: US Census Bureau (Table B25011 5-year estimate 2024)

Pennsylvania's Lack of Building Has Contributed to Housing Shortage, Hurt Affordability

Elsewhere, reforms have added homes, improved affordability

ISSUE BRIEF

March 12, 2025

Read time: 17 min

Projects: [Housing Policy](#)



Alex Potemkin/Getty Images

Overview

Housing costs rise when there are not enough homes to meet demand. Pennsylvania, in part because of restrictive zoning regulations, ranked 44th among the 50 states on rate of housing built from 2017 to 2023. The average rent in the 23 Pennsylvania counties tracked

by Zillow's rent estimate was \$1,013 in 2017 and \$1,476 in 2023, a 46% increase.¹ That is much larger than the increase in wages and prices for other goods and services from 2017 to 2023.²

The increase in housing costs was most pronounced in parts of Pennsylvania that experienced a population increase but did not allow for construction of enough new homes to house the larger population. The 23 counties tracked by Zillow and analyzed in this report include Pennsylvania's most populous cities and counties. The population in the 23 counties, combined, grew only 0.7% from 2017 to 2023, while in northeastern Pennsylvania it grew 1.7%, and in Philadelphia's suburbs, the population increased 2.5%.³ Rent increases were greatest—as high as 81%—in northeastern Pennsylvania, where housing costs actually rose faster than in New York City (+30%) and its suburbs (+44%) from 2017 to 2023 (although rents in New York and New Jersey were still higher than in Pennsylvania as a whole), while housing production lagged behind demand.⁴

Rents also grew significantly in smaller metropolitan areas such as Lancaster, Reading, Harrisburg, and York, as well as the Philadelphia suburbs and parts of western Pennsylvania, many of which gained population faster than they provided additional housing.

Not only do residents have hundreds of dollars less to spend each month on groceries and other bills as a result of higher rents, but homeownership has been pushed further out of reach because not enough housing is being built. As the number of homes on the market across Pennsylvania has dropped by 60%, from 48,199 in January 2017 to just 19,361 in December 2023, the median price of homes has risen by 55% statewide, from \$165,000 to \$255,000. In northeastern Pennsylvania, it has increased by 73%.⁵

In Pennsylvania as in most of the United States, individual towns, cities, and counties issue and enforce most land use and zoning regulations. From 2017 to 2023, local governments issued building permits for only enough units to increase the state's housing stock by 3.4%—well below the United States as a whole, which had a 7.5% increase during that seven-year period. Meanwhile, the number of households in Pennsylvania increased by 5.1%, which is above the increase in the housing stock. Fewer permits issued leads to fewer homes built—a major reason that rents have increased dramatically in Pennsylvania.

Pennsylvania also lagged behind the national average in adding lower-cost homes such as apartments, duplexes, and town houses, in large part because of zoning restrictions.⁶ Many localities around the state, for instance, allow only one single-family home to be built on land that could instead house more families. Other places have very large minimum lot sizes for new development, precluding efficient land use. Still others limit the viability of potentially

more affordable types of housing, such as accessory dwelling units (smaller residential units, such as “granny flats” or garage apartments, built on a lot with a larger home).

The United States has a nationwide housing shortage. In order to address the deficiency in their states, state-level policymakers in Arizona, Colorado, Florida, Maryland, Montana, and Rhode Island have enacted legislation designed to increase housing supply statewide and stabilize costs. At the city level, Houston and Minneapolis provide examples of how increasing housing supply held down rent growth and improved affordability.

How Pennsylvania compares with other states

Pennsylvania ranks below almost all other states in recent new home construction. From 2017 to 2023, its communities issued enough building permits to increase the number of housing units in the state by just 3.4% compared with the number of units that existed in 2017. (Because some of those permits allowed for the replacement of existing homes, that does not mean the total number of units increased 3.4%.) In contrast, in the most prolific state, Utah, the number of permits issued from 2017 to 2023 equaled 19.1% of the state’s 2017 housing supply. Idaho and Texas ranked second and third, with building permits totaling 17.4% and 14.4% of the 2017 housing stock over this period. (See Figure 1.)

Only six states rank below Pennsylvania in the share of new units approved. Nor is this a recent trend: Pennsylvania has issued permits to add only 10% more homes since 2000, compared with a 25% increase nationally.⁷

Figure 1

Pennsylvania Ranked 44th Among States in Issuing New Housing Permits

Newly permitted units from 2017 to 2023 were just 3.4% of 2017 housing stock

Sources: Residential permits from 2017 to 2023 as a share of housing units in 2017. U.S. Department of Housing and Urban Development, State of the Cities Data Systems: Building Permits Database, 1980-2023. Housing unit data from U.S. Census Bureau, “Housing Units,” American Community Survey 1-Year Estimates Detailed Tables, Table B25001, 2017.

© 2025 The Pew Charitable Trusts

Housing costs have risen the most in northeastern Pennsylvania

In the northeastern part of Pennsylvania, local governments issued fewer building permits than the rest of the state. From 2017 to 2023, local governments in Monroe County, the Scranton-Wilkes-Barre area, and the Lehigh Valley around Allentown approved permits totaling just 2.5% of the 2017 housing supply, less than the already-low statewide figure of 3.4%. (See Figure 2.) Rents rose faster here than in other parts of Pennsylvania—an average of 63%. That shouldn't come as a surprise: When more people are looking for homes than there are homes available, landlords can raise rents substantially. Landlords don't have that leverage when there is an abundance of available homes.

From 2017 to 2022, which includes the peak years of the COVID-19 pandemic, the region saw a greater demand for housing. About 97,000 people moved into northeastern Pennsylvania from New York and New Jersey while only about 32,000 Pennsylvania residents moved the opposite way. Rents and home sale prices subsequently rose because there weren't enough homes, prompting many residents of northeastern Pennsylvania to move to less expensive parts of the state or to states with lower housing costs, such as North Carolina and Florida, according to The Pew Charitable Trusts' analysis of Internal Revenue Service migration data.⁸

Regions where the fewest permits were issued saw the highest rent increases. In the Poconos, for example, Monroe County municipalities issued permits for only enough housing to increase the county's supply by 2% from January 2017 to December 2023.⁹ The average rent in Monroe County rose 81% during that time, from \$1,032 to \$1,870 per month, well above the \$1,476 average for Pennsylvania's 23 counties tracked by Zillow. In Luzerne County, in and around Wilkes-Barre (+1.5% growth in housing permits), renters paid 71% more in 2023 than in 2017. Rent increases were somewhat lower (57%), but still well above the state average, in Lackawanna County (Scranton and its environs), where only 1.6% more homes were approved in those seven years.

By contrast, the two northeastern Pennsylvania counties that approved the most housing (Northampton and Lehigh) experienced the slowest rent growth (+54% and +52%, respectively). (See Figure 2.)

The price of homeownership also soared during this seven-year period, rising 55% statewide. Some jurisdictions saw even faster growth, making homeownership less attainable. Prices rose in the counties containing Allentown (+65%), Lewistown (+67%), Reading (+69%), Pottsville (+78%), and East Stroudsburg (+105%). Price increases this steep tend to occur only when inventory shortages become severe. Such sharp increases are often indicative of a market where not enough starter homes, such as town houses, are being built, partially because of restrictive zoning.

Figure 2

Rents in Northeastern Pennsylvania Have Increased More Than in Other Populous Counties

Housing construction has been below the state average in 4 of 5 northeastern counties

Sources: Zillow Group Inc., Zillow Observed Rent Index (ZORI), 2015-24. Rent data from Zillow's ZORI for Pennsylvania's 23 counties (of 67) with sufficient data in 2017 and 2023. Residential permits from 2017 to 2023 as a share of housing units in 2017. U.S. Department of Housing and Urban Development, State of the Cities Data Systems: Building Permits Database, 1980-2023. Housing unit data from U.S. Census Bureau, "Annual Estimates of Housing Units for Counties in Pennsylvania."

© 2025 The Pew Charitable Trusts

For residents who have stayed in northeastern Pennsylvania, these increases hurt. Fully 61% of Monroe County renters were considered rent-burdened in 2023, meaning they spent more than 30% of their income on housing and utilities—higher than the 55% of renters nationally or the 53% statewide who had to spend that much. (See Figure 3.)¹⁰ The Scranton-Wilkes-Barre region has also become much less affordable, with 58% of renters considered rent-burdened in 2023, compared with 48% in 2017. And 38% of renters in the region were severely burdened, spending more than half their income on housing in 2023. That's much higher than the 30% of residents who were severely rent-burdened in 2017. (See Figure 3.)

Figure 3

Proportion of Rent-Burdened Households Increased Throughout Northeastern Pennsylvania From 2017 to 2023

In 2023, rent burdens were higher in northeastern Pennsylvania than in the state or the nation

Notes: Severe rent burden means >50% of income spent on rent; renter cost burden means 31%-50% of income spent on rent. Poconos (Monroe County) data comes from East Stroudsburg, Pennsylvania, micro area.

Sources: Pew analysis of American Community Survey one-year estimates for 2017 and 2023. U.S. Census Bureau, "Gross Rent as a Percentage of Household Income in the Past 12 Months." American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B25070, 2017. U.S. Census Bureau, "Gross Rent as a Percentage of Household Income in the Past 12 Months," Table B25070, 2023.

© 2025 The Pew Charitable Trusts

Runaway rents in the Philadelphia suburbs

Philadelphia and its suburbs present a clear picture of the relationship between new home construction and housing prices. From 2017 to 2023, Philadelphia issued nearly twice as

many building permits, proportionally, as Pennsylvania's statewide average (7.2% versus 3.4%). But the city's suburbs added less housing—as little as 1.2% in Delaware County and 2.4% in Bucks County. Rents in the city increased by 30% in those seven years, but they rose 44% to 47% in neighboring counties on the Pennsylvania side of the Delaware River. (See Figure 4.)

Renters felt the pinch, especially in Chester, Montgomery, and Delaware counties, where the share of households spending more than 30% of their income on rent and utilities rose from 2017 to 2023. The increase was highest in Delaware County, where the portion of rent-burdened households increased 7.1% in seven years.

Local governments in Chester and Montgomery counties issued proportionally more permits than neighboring Bucks and Delaware counties from 2017 to 2023, but rents still increased by 44% in both counties in seven years. (See Figure 4.) Moreover, the increase in the number of rent-burdened households—6.1% in Montgomery County and 4.8% in Chester County—suggests that even more new homes were necessary to maintain prior levels of affordability.

In contrast, Philadelphia permitted more housing growth than its suburbs. Partly as a result, the number of rent-burdened households in the city fell by more than eight percentage points as it rose elsewhere. But even this additional housing still fell short of what the city needed: The average monthly rent increased by \$394 (30%) from 2017 to 2023, well above the rate of inflation.

Figure 4

With Little Housing Growth, Rents Soared in Suburban Philadelphia Counties

From 2017 to 2023, Philadelphia issued permits for more homes and saw slower rent growth

Sources: Rent data from Zillow Group Inc., Zillow Observed Rent Index (ZORI), 2015-24. Residential building permits from 2017 to 2023 as a share of housing units in 2017. Permit data from U.S. Department of Housing and Urban Development, State of the Cities Data Systems: Building Permits Database, 1980-2023. Housing unit data from U.S. Census Bureau, "Annual Estimates of Housing Units for Counties in Pennsylvania." Renter cost burden estimates from American Community Survey one-year estimates in 2017 and 2023. U.S. Census Bureau, "Gross Rent as a Percentage of Household Income in the Past 12 Months." American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B25070, 2017. U.S. Census Bureau, "Gross Rent as a Percentage of Household Income in the Past 12 Months." American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B25070, 2023.

© 2025 The Pew Charitable Trusts

Counties that issued the most permits saw the slowest rent growth

The undersupply of housing and large rent increases also plagued other parts of the state—not just in the Philadelphia region and northeastern Pennsylvania. Several metropolitan areas within about two hours' drive of Philadelphia also experienced significant population growth (2% or more) and large rent increases from 2017 to 2023, such as Reading (rents +62%) and Lancaster (+57%). Harrisburg (+50%), Carlisle (+49%), and York counties (+49%) had rent increases in line with the 23 Pennsylvania counties tracked by Zillow.

These smaller metropolitan areas remain bastions of relatively affordable housing. December 2023 rents in those five cities averaged \$1,364, well below Philadelphia's suburbs (\$1,979) and the city itself (\$1,672). But local governments in these areas issued permits for an increase in housing units of about 4.3% from 2017 to 2023—above the state average but well below the increase in Philadelphia. Without the construction of more housing, the relative affordability of these metropolitan areas may be eroded or even erased in the future. Cumberland County, which contains Carlisle and Mechanicsburg, was an exception: The population surged more than 7% from 2017 through 2023, and communities there approved 7,700 building permits, 7.3% of the 2017 housing stock. This new housing was just enough to keep rents to a near-average 49% increase from 2017 to 2023.

Farther west of the Susquehanna River, rent increases were lower than the 46% average in the Pennsylvania counties tracked by Zillow, but higher than Philadelphia's 30% average increase. Rents in the Pittsburgh region increased 36% from 2017 to 2023, while jurisdictions issued permits totaling only 2.9% of the housing stock. Communities in Erie County, in the state's northwest corner, issued permits for just 1.3% more homes—and saw rents climb by 40%. Johnstown (Cambria County) was similar: 43% rent growth and permits for only 0.7% more new units.

On the other hand, the two Pennsylvania counties with the smallest rent increases allowed the construction of above-average levels of new housing. Local governments in Butler County, north of Pittsburgh, issued permits to increase the housing stock by 8.4%. Rents grew 29% in seven years. Communities in Centre County, home to Penn State's flagship campus, allowed permits for 4.9% more units; rents increased 28% from 2017 to 2023.

Examples of local zoning rules that restrict new housing

Many Pennsylvania communities have laws that limit the construction of new housing, and thus housing supply. One common way zoning laws prevent more housing from being built is by requiring that just one house, which usually houses just one family, sits on a relatively

large lot—in some cases, a full acre or nearly two. Examples from across the state highlight the pervasiveness of this policy.

In the Philadelphia suburb of Lower Gwynedd, in Montgomery County, a single-family home requires at least 35,000 square feet of land—more than three-quarters of an acre.¹¹ Nearby Doylestown (Bucks County) requires at least 80,000 square feet of land per home—nearly two acres.¹² Both towns—and most other suburban communities—have water and sewer access; the existing infrastructure could serve many more homes than are currently allowed by law. If zoned differently, that one Doylestown lot could hold 40 town houses on 2,000-square-foot lots, with each two- or three-story home as large as the U.S. median new single-family house (2,233 square feet in 2023).¹³

In northeastern Pennsylvania, East Stroudsburg, the largest municipality in Monroe County, requires at least 12,500 square feet of land for each house in some areas. Even in the borough's relatively high-density residential areas, every new house must have at least a 7,500-square-foot lot.¹⁴ In the western part of the state, Erie County has a minimum lot size of 7,200 square feet, even in areas with sewer and water service.¹⁵ South Fayette, a suburb of Pittsburgh, requires 20,000-square-foot lots for suburban residential homes, even in areas with existing sewer service.¹⁶

Philadelphia, on the other hand, has more varied and in some cases more permissive zoning than its suburbs on the Pennsylvania side of the Delaware River. Although minimum lot sizes are as high as 10,000 square feet in some areas of the city zoned for detached single-family housing,¹⁷ in other areas, Philadelphia allows single-family row houses on lots as small as 700 square feet. Other parts of the city are zoned to allow multifamily apartments or condominiums and mixed-use buildings. Flexible zoning has allowed for the development of more housing, and Philadelphia issued permits for new housing at about twice the statewide rate from 2017 to 2023; its rent increases were much less than statewide (30% in Philadelphia, compared with 46% in the 23 Pennsylvania counties tracked by Zillow).

Most Pennsylvania communities also either forbid or make it difficult to build accessory dwelling units (ADUs), which can play an important role in adding more housing units across all neighborhood types. The American Planning Association defines an ADU as “a smaller, independent residential dwelling unit located on the same lot as a stand-alone (i.e., detached) single-family home.”¹⁸ There are many different types of ADUs—for example, attic and basement apartments, converted garages, and above-garage apartments. With their combination of proximity to a single-family home and allowance for independent living, ADUs also provide opportunities for aging in place and multigenerational living.

Many jurisdictions do not allow ADUs or allow them only with a special use permit, which adds time and increases approval costs. Even where ADUs are allowed, minimum size regulations prevent them from being built or being financially viable.¹⁹ Lehigh County, for example, requires an ADU to have at least 1,000 square feet of living space.²⁰ Cambria County, east of Pittsburgh, has an 800-square-foot minimum.²¹ Such minimums—roughly twice the size of a typical above-the-garage apartment or granny flat—significantly raise the costs of building an ADU.²²

What Minneapolis and Houston did to increase housing supply

Pennsylvania's experience mirrors what's happening in other parts of the country: Housing costs are rising where population growth is not met by additional housing supply. Although rent growth in Pennsylvania's counties tracked by Zillow (+46%) was similar to growth in the U.S. as a whole (+47%) from 2017 to 2023, Pennsylvania permitted many fewer housing units (3.4% of the state's 2017 housing stock, compared with 7.5% for the entire U.S.). More specifically, areas where zoning laws prevent the construction of less expensive housing—such as town houses, duplexes, triplexes, apartment buildings, and manufactured housing—saw large increases in housing prices.²³

As counterexamples, Houston and Minneapolis illustrate what governments can do to increase the availability of lower-cost housing. Houston relaxed its minimum lot requirements in the city's urban core in 1998, reducing the minimum lot size from 5,000 to 1,400 square feet of land for most homes. It expanded this program citywide in 2013.²⁴ The result was a boom in new town houses, many of them affordable to households with median incomes.²⁵ Enabled by lot-size reform and other government actions, Houston issued permits for 102,000 housing units from 2017 to 2023, about 11% of its 2017 housing stock; the city's average rent increased 28% in that period, 19 percentage points below the national average (47%). (See Figure 5.)²⁶

Since 2009, Minneapolis has also instituted major zoning changes designed to increase its housing supply. It allowed the construction of more apartment buildings along commercial corridors, then reduced and eventually eliminated parking requirements. And in 2020, it began allowing duplexes and triplexes citywide. The results are striking: From 2017 to 2023, the city issued enough building permits to increase the number of housing units by 12%. According to Pew research, the vast majority of those new units were in apartment buildings—and less expensive than single-family homes.²⁷

Minneapolis experienced rent increases well below state and national averages from 2017 to 2023, despite a 12.7% increase in the number of households in the city. (See Figure 5.)²⁸ Had rents in Minneapolis grown as much as in the rest of Minnesota, the city's renters would be spending an estimated \$1,700 more annually in rent.²⁹ In 2017, a Minneapolis resident had to earn 80% of the area median income to afford the median apartment rent. By 2023, that figure had fallen to 66%.³⁰

Figure 5

Cities With Major Land-Use Reforms Experienced Slower Rent Growth Than Pennsylvania, 2017-23

Minneapolis and Houston permitted much more housing than Pennsylvania and had lower rent increases

Sources: Zillow Group Inc., Zillow Observed Rent Index (ZORI), 2015-24. Rent data from Zillow's ZORI, January 2017 to December 2023. Residential permits from 2017 to 2023 as a share of housing units in 2017. Permit data from U.S. Department of Housing and Urban Development, State of the Cities Data Systems: Building Permits Database, 1980-2023. County housing units from U.S. Census Bureau, "Annual Estimates of Housing Units for Counties in Pennsylvania," 2010-20. City housing unit estimates from U.S. Census Bureau, American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B25001, 2017.

© 2025 The Pew Charitable Trusts

What can Pennsylvania do?

Although land-use regulation and zoning remain largely the responsibility of local governments nationwide, many states have enacted legislation designed to increase housing supply, at least 10 of them—Arizona, Colorado, Florida, Hawaii, Maryland, Montana, Rhode Island, Tennessee, Vermont, and Washington—in 2023 and 2024 alone.³¹ Montana, for example, passed laws to allow residential buildings in commercial areas, enabled ADUs without parking or owner-occupancy requirements, and streamlined permitting processes.³² Washington made condominium construction easier, allowed small multifamily units in larger cities where only single-family homes had been allowed, and standardized the design review process.³³ Laws like these have strong, bipartisan public support, as evidenced by a 2023 Pew survey of 5,051 adults nationwide.³⁴ Eighty-one percent, for instance, supported allowing apartments near bus and train stations or major job centers.

Pennsylvania policymakers have numerous options, which draw on successful policies enacted elsewhere:

- Allow small multifamily buildings (duplexes and triplexes) on lots that now permit only single-family homes.

- Permit the construction of accessory dwelling units—including in attics, basements, and backyards—on lots that now permit only single-family homes.
- Reform permitting laws to simplify and speed up the process.
- Allow more apartments near commercial areas and public transportation.
- Reduce or remove minimum parking mandates that increase the cost of building multifamily dwellings.
- Convert commercial buildings to apartments.
- Enable the construction of housing on land owned by nonprofit organizations, educational institutions, and religious organizations, such as churches.

Data from cities such as Houston and Minneapolis, which made similar changes years ago, suggests that these laws are likely to improve housing affordability, saving Pennsylvania residents hundreds, and in some cases thousands, of dollars per year. Had Pennsylvania made some of these changes and added more housing earlier, rents would now be lower.³⁵ Further afield, research from the United Kingdom and Australia suggests that for every 10% that a region adds to its housing supply, housing costs are 11% to 22% lower than they would have been without the additional housing.³⁶ The average rent in the 23 Pennsylvania counties tracked by Zillow was \$1,476 in 2023. A 10% increase in housing supply would thus have saved a typical household \$162 to \$325 per month—as much as \$3,900 per year.

These savings would help Pennsylvania residents who are struggling to pay their bills or to become first-time homeowners. Local businesses also would benefit from the additional spending power of residents who were not burdened by large monthly rent payments. The examples provided by other states and localities provide a possible roadmap for Pennsylvania lawmakers looking to increase housing availability—and to give a boost to the state and local economies.

Acknowledgments

This brief was researched and written by Pew staff members Seva Rodnyansky, Kery Murakami, and Alex Horowitz. The project team thanks Demetra Aposporos, Esther Berg, Zach Bernstein, Laurie Boeder, Erika Compart, Gabriela Domenzain, Carol Hutchinson, Abi Ingoglia, Avi Meyer, Bernard Ohanian, Briana Okebalama, Chelsie Pennello, Travis Plunkett, Drew Swinburne, Jeff Thiebert, and Gaye Williams for providing important communications, creative, editorial, and research support.

Endnotes

1. Zillow's Zillow Observed Rent Index (ZORI) rent estimates reflect the mean of the middle 30% of the rental housing market (the 35th to 65th percentile). The methodology uses a weighted index and assigns a dollar value for each month's per-unit rent to ease interpretation. We will refer to these as average rent, for interpretation simplicity. See "Methodology: Zillow Observed Rent Index (ZORI)," Zillow Group Inc., <https://www.zillow.com/research/methodology-zori-repeat-rent-27092/>. In Pennsylvania, ZORI rent estimates are available for 23 counties during our time range. Counties with data from January 2017 to December 2023 include: Allegheny, Berks, Bucks, Chester, Cumberland, Dauphin, Delaware, Erie, Franklin, Lackawanna, Lancaster, Lehigh, Luzerne, Monroe, Montgomery, Northampton, Philadelphia, Washington, and York. Additionally, Butler, Cambria, Centre, and Westmoreland counties had Zillow ZORI data for some part of 2017 or early 2018 and were included in this analysis for completeness. "Zillow Observed Rent Index (ZORI)," Zillow Group Inc., 2015-24, <https://www.zillow.com/research/data/>.
2. Wages in Pennsylvania increased by 26% from 2017 Q1 to 2023 Q2. "Average Weekly Wage in Total Covered Total, All Industries for All Establishment Sizes in Pennsylvania—Statewide, NSA, Series ID: ENU4200040010" Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), 2014-2024, <https://data.bls.gov/series-report>. Consumer goods prices from "Consumer Price Index for All Urban Consumers: All Items Less Shelter in U.S. City Average," Federal Reserve Bank of St. Louis, <https://fred.stlouisfed.org/series/CUUR0000SA0L2>.
3. "Intercensal Estimates of the Resident Population for Counties in Pennsylvania: April 1, 2010 to April 1, 2020," U.S. Census Bureau, <https://www2.census.gov/programs-surveys/popest/tables/2010-2020/intercensal/county/co-est2020int-pop-42.xlsx>. "Annual Estimates of the Resident Population for Counties in Pennsylvania: April 1, 2020 to July 1, 2023," U.S. Census Bureau, Population Division, <https://www2.census.gov/programs-surveys/popest/tables/2020-2023/counties/totals/co-est2023-pop-42.xlsx>.
4. New York City rents are an average of Zillow's ZORI rents in the five New York City counties: Kings, Queens, New York, Bronx, and Richmond. Suburban New York and New Jersey counties include those in the New York-Newark-Jersey City metropolitan area available in Zillow ZORI from January 2017 to December 2023. These are Suffolk, Nassau, Westchester, and Rockland counties in New York, and Bergen, Middlesex, Essex, Hudson, Monmouth, Ocean, Union, Passaic, Morris, Somerset, and Hunterdon counties in New Jersey. "Zillow Observed Rent Index (ZORI)," Zillow Group Inc.
5. Average percentage change of Zillow Home Values Index (ZHVI) for Monroe, Northampton, Luzerne, Lackawanna, and Lehigh counties in Pennsylvania. Zillow Group

- Inc., "Zillow Home Value Index (ZHVI)," <https://www.zillow.com/research/data/>. Federal Reserve Bank of St. Louis, "Housing Inventory: Active Listing Count in the United States," 2024, <https://fred.stlouisfed.org/series/ACTLISCOUUS>.
6. Pennsylvania Department of Community and Economic Development, "Reducing Land Use Barriers to Affordable Housing, Planning Series #10," 2015, <http://www.alleghenyplaces.com/pdf/Reducing%20Land%20Use%20Barriers%20to%20Affordable%20Housing.pdf>.
 7. "State of the Cities Data Systems: Building Permits Database," U.S. Department of Housing and Urban Development, 1980-2023, <https://socds.huduser.gov/permits/index.html>. Brian Potter, "Why Are There So Few Economies of Scale in Construction?," <https://www.construction-physics.com/p/why-are-there-so-few-economies-of>.
 8. "SOI Tax Stats—Migration Data," Internal Revenue Service, <https://www.irs.gov/statistics/soi-tax-stats-migration-data>.
 9. Local governments issue building permits to builders allowing them to add new housing units. Building permits are an estimate of expected demand for new housing units. Issuing a building permit does not necessarily mean that a building is built or a home is added. In Pennsylvania, for every one unit added to the housing stock from 2000 to 2023, 1.14 units were permitted; nationally, for every one unit added to the housing stock from 2000 to 2023, 1.01 units were permitted. Not issuing building permits means no new units are added. "State of the Cities Data Systems: Building Permits Database," U.S. Department of Housing and Urban Development.
 10. Monroe County housing cost burdens are based on the figures for the East Stroudsburg MSA, which encompasses Monroe County.
 11. A-1 Residential District: Permitted Uses, 1258.03.a.3, Township of Lower Gwynedd, PA, <https://ecode360.com/13449907#13449909>.
 12. Dimensional Requirements, 175-17:G2, Township of Doylestown, <https://ecode360.com/10730600#10730601>.
 13. U.S. Census Bureau, "Highlights of 2023 Characteristics of New Housing," <https://www.census.gov/construction/chars/highlights.html>.
 14. Table of Bulk Regulations Governing the Size of Lots, Yards and Buildings for Permitted Uses Only, 157-36, Borough of East Stroudsburg, 2022, <https://ecode360.com/attachment/EA0636/EA0636-157b%20Table%20of%20Bulk%20Regulations.pdf>.

15. Erie County Subdivision and Land Development Ordinance: Lot and Yard Requirements, 502.9.a, Erie County, PA, 2019, <https://eriecountypa.gov/wp-content/uploads/2021/08/Erie-County-SALDO-as-Amended-5-28-19.pdf>.
16. R-2 Suburban Residential District: Area and Bulk Regulations, 240-23.a.2.b, Township of South Fayette, PA, <https://ecode360.com/11615744#11615795>.
17. The Philadelphia Code: Zoning and Planning: Development Standards: Dimensional Standards for Lower Density Residential Districts, 14-701-1, City of Philadelphia, https://codelibrary.amlegal.com/codes/philadelphia/latest/philadelphia_pa/0-0-0-292815#JD_14-701.
18. "Accessory Dwelling Units," American Planning Association, <https://www.planning.org/knowledgebase/accessorydwellings/>.
19. Zoe Harper, "ADU Laws and Regulations in Pennsylvania," Steadily, Jan. 18, 2024, <https://www.steadily.com/blog/adu-laws-and-regulations-in-pennsylvania>.
20. Lehigh County Zoning Code—Minimum Habitable Floor Area, 180-35, Lehigh County, PA, 2023, <https://ecode360.com/13034192#13034292>.
21. Cambria County Zoning Code: Conversion Apartment, 27-901, Cambria County, PA, 2013, <https://cambriaplanning.org/wp-content/uploads/2013/04/chapter-27-zoning.pdf>.
22. "Tiny Home Regulations in PA: The Complete Guide," Zook Cabins, <https://www.zookcabins.com/regulations/tiny-home-regulations-in-pennsylvania>.
23. "More Flexible Zoning Helps Contain Rising Rents," The Pew Charitable Trusts, Alex Horowitz and Ryan Canavan, <https://www.pewtrusts.org/en/research-and-analysis/articles/2023/04/17/more-flexible-zoning-helps-contain-rising-rents>. "Rigid Zoning Rules Are Helping to Drive up Rents in Colorado," Alex Horowitz and Ryan Canavan, The Pew Charitable Trusts, <https://www.pewtrusts.org/en/research-and-analysis/articles/2023/04/27/rigid-zoning-rules-are-helping-to-drive-up-rents-in-colorado>. "New York's Housing Shortage Pushes up Rents and Homelessness," Alex Horowitz, The Pew Charitable Trusts, <https://www.pewtrusts.org/en/research-and-analysis/articles/2023/05/25/new-yorks-housing-shortage-pushes-up-rents-and-homelessness>.
24. For every area that had wastewater collection services. Emily Hamilton, "The Effects of Minimum-Lot-Size Reform on Houston Land Values," Mercatus Center of George Mason University, 2024, <https://www.mercatus.org/research/working-papers/effects-minimum-lot-size-reform-houston-land-values>.

25. "Lot-Size Reform Unlocks Affordable Homeownership in Houston," The Pew Charitable Trusts, <https://www.pewtrusts.org/en/research-and-analysis/issue-briefs/2023/09/lot-size-reform-unlocks-affordable-homeownership-in-houston>.
26. "Zoning Reform Can Reduce Homelessness," Alex Horowitz and Lisa Marshall, The Pew Charitable Trusts, <https://www.pewtrusts.org/en/about/news-room/opinion/2024/02/19/zoning-reform-can-reduce-homelessness>.
27. "Minneapolis Land Use Reforms Offer a Blueprint for Housing Affordability," Alex Horowitz, Linlin Liang, and Adam Staveski, The Pew Charitable Trusts, Jan. 4, 2024, <https://www.pewtrusts.org/en/research-and-analysis/articles/2024/01/04/minneapolis-land-use-reforms-offer-a-blueprint-for-housing-affordability>.
28. City of Minneapolis, Zoning Code Text Amendments Subdivision Ordinance Amendments Heritage Preservation Ordinance Amendments (2018), <https://www2.minneapolismn.gov/media/content-assets/www2-documents/business/Zoning-Code-Text-Amendments-Approved-2004-2018.pdf>. Alex Horowitz, Linlin Liang, and Adam Staveski, "Minneapolis Land Use Reforms Offer a Blueprint for Housing Affordability."
29. Alex Horowitz, Linlin Liang, and Adam Staveski, "Minneapolis Land Use Reforms Offer a Blueprint for Housing Affordability."
30. "Gross Rent as a Percentage of Household Income in the Past 12 Months," U.S. Census Bureau, <https://data.census.gov/table/ACSDT1Y2011.B25070?q=B25070&g=310XX00US33460>.
31. Rachel Ozer-Bearson Shazia Manji, "Pro-Housing Designation Programs: How States Are Incentivizing Pro-Housing Reform," Turner Center for Housing Innovation, 2024, <https://turnercenter.berkeley.edu/wp-content/uploads/2024/11/TurnerCenterProHousingDesignationPrograms.pdf>. Salim Furth Eli Kahn, "Breaking Ground: An Examination of Effective State Housing Reforms in 2023," Mercatus Center at George Mason University, 2023, <https://www.mercatus.org/research/policy-briefs/breaking-ground-examination-effective-state-housing-reforms-2023>.
32. Salim Furth Eli Kahn, "Breaking Ground."
33. Salim Furth Eli Kahn, "Breaking Ground."
34. "Support for Policies That Promote More Housing Crosses Geographic Lines," Alex Horowitz and Tushar Kansal, The Pew Charitable Trusts, Jan. 31, 2024, <https://www.pewtrusts.org/en/research-and-analysis/articles/2024/01/31/support->

[for-policies-that-promote-more-housing-crosses-geographic-lines](#). “Strong Support Across Partisan Lines for Policies That Boost Housing,” Tushar Kansal and Andy Winkler, The Pew Charitable Trusts, <https://www.pewtrusts.org/en/research-and-analysis/articles/2024/05/29/strong-support-across-partisan-lines-for-policies-that-boost-housing>.

35. Trent Saunders and Peter Tulip, “A Model of the Australian Housing Market,” Reserve Bank of Australia, 2019, <https://www.rba.gov.au/publications/rdp/2019/pdf/rdp2019-01.pdf>.
36. Based on a compilation of supply elasticity of housing price estimates from the United Kingdom and Australia. Trent Saunders and Peter Tulip, “A Model of the Australian Housing Market.”

ISSUE BRIEF

March 12, 2025

Projects: [Housing Policy](#)

Topics: [Fiscal & Economic Policy](#) & [U.S. State Policy](#)

Tags: [Housing](#)

Experts: [Alex Horowitz](#)

Places: [Minnesota](#), [Pennsylvania](#) & [Texas](#)

RELATED EXPERTS



[Alex Horowitz](#)

Project Director
Housing Policy Initiative



MEDIA CONTACT

Esther Berg

Officer, Communications

[202.552.2283](tel:202.552.2283)



York County Market Analysis

MARKET REPORT

INDUSTRIAL | YORK COUNTY, PA | Q3 2025



INVENTORY (SF)	VACANCY RATE	SALES (\$)	SALES (SF)	LEASED (SF)	RENT CHANGE
90.21M ↑	2.35% ↑	\$8.29M ↓	88,015 ↓	153,878 ↓	+\$0.34 ↑ <i>12-month rolling avg</i>

Major Manufacturing and Data Center Projects Announced

HIGHLIGHTS

- Class B properties continue to be favored by tenants and saw a 17% increase to average rents from Q2
- Average price per square foot paid for industrial properties in York County has grown 95% since 2021, with YTD averages already 11% above 2024 despite less sales conveyed
- Several major development projects announced in Q3 showcased PA's goal to maintain the Commonwealth's status as a manufacturing and energy leader

OVERVIEW

Expanding e-commerce, onshoring and digital storage demand inspired more growth across the sector. Overall average lease rates grew 7% YOY to \$6.90/SF, slightly outpacing the national rate growth of 6% to \$8.63/SF.*

Leadership's ongoing push to grow and develop PA's competitive standing within manufacturing and energy sectors generated several major projects. At the Energy and Innovation Summit held in July, leaders in energy and AI, along with key representatives within the labor, trade and government sectors, announced \$90B of investment projects that focus on developing data centers, improving energy and power infrastructure, and increasing workforce and AI training.

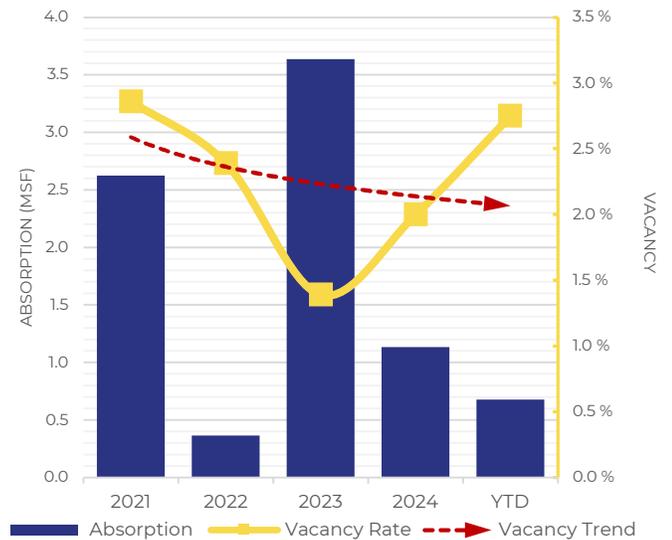
York 2 Energy Center in Peach Bottom Township is the location of a \$5B investment from Energy Capital Partners to build a data center and various community solar projects, which are expected to create jobs and reduce energy prices for consumers.

Another grant-funded data center project was announced in August but is pending approval from Fairview Township's board of supervisors. The Florida-based real estate developer who owns the parcel of land proposed a 750,000 SF data center to create jobs and increase tax revenue for the local economy.

Finally, access flooring manufacturer Tate will expand operations at their 100 Redco Ave in Red Lion facility after being granted \$2.5M of private sector investments secured by the Commonwealth.

* <https://www.yardimatrix.com/blog/us-industrial-market-outlook/>

NET ABSORPTION & VACANCY



SF LEASED & AVG LEASE RATE



Key Sale Transactions

30 Marianne Dr, York

SIZE	20,286 SF
SELLER	Keystrect Construction LLC
BUYER	RJM Investment Management LLC
PRICE	\$2,550,000

2080 Lemon St, York

SIZE	8,864 SF
SELLER	Quest Partners of PA LLC
BUYER	BRX2080 LLC
PRICE	\$1,625,000

77 Keeney Ln, York

SIZE	18,880 SF
SELLER	Troy E. Abel
BUYER	Boulder Hill Properties LLC
PRICE	\$1,450,000

3466 Board Rd, York

SIZE	18,912 SF
SELLER	Eugene Garrod
BUYER	BFPE International
PRICE	\$1,150,000

23 Amy Way, Hanover

SIZE	3,000 SF
SELLER	Mid Atlantic Exchange, LLC
BUYER	23 Amy Way LLC
PRICE	\$525,000

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

3325 Connelly Rd, Emigsville

SIZE	15,490 SF
TENANT	LL & T
TRANSACTION	Extension

15894 Elm Dr, New Freedom

SIZE	14,978 SF
TENANT	KW Liquidator's LLC
TRANSACTION	Extension

1217-1221 E Elm St, York

SIZE	12,324 SF
TENANT	Atlas Ranger, LLC
TRANSACTION	New

60 S Prospect St, Hallam

SIZE	9,936 SF
TENANT	Diamond Shine
TRANSACTION	New

100 Redco Ave, Red Lion

SIZE	9,272 SF
TENANT	Z&K Bauer Transport
TRANSACTION	Extension



MARKET REPORT

INDUSTRIAL | YORK COUNTY, PA | Q4 2025



INVENTORY (SF)	VACANCY RATE	SALES (\$)	SALES (SF)	LEASED (SF)	RENT CHANGE
92.18M ↑	2.78% ↑	\$7.51M ↓	125,676 ↑	629,416 ↑	+\$0.29 ↑ <i>12-month rolling avg</i>

Economic Forces and Shrinking Unit Sizes Softened Growth Trends

HIGHLIGHTS

- Absorption growth slowed and overall vacancy increased 43 bps to 2.78%
- Average lease rates rose 11% YOY, most notably within Class C assets which saw a 12% increase to \$5.70/SF
- Three quarters of new leases signed in 2025 were for spaces less than 15K SF, shrinking the overall average unit size by 34% YOY

OVERVIEW

2025 witnessed the industrial sector transform and transition through tariff and import volatility alongside the explosion of advanced manufacturing and data center demand. In Q4 alone, lenders and investors had to navigate a rocky CRE landscape impacted by a 43-day government shutdown, three consecutive fed rate cuts and a cooling labor market.

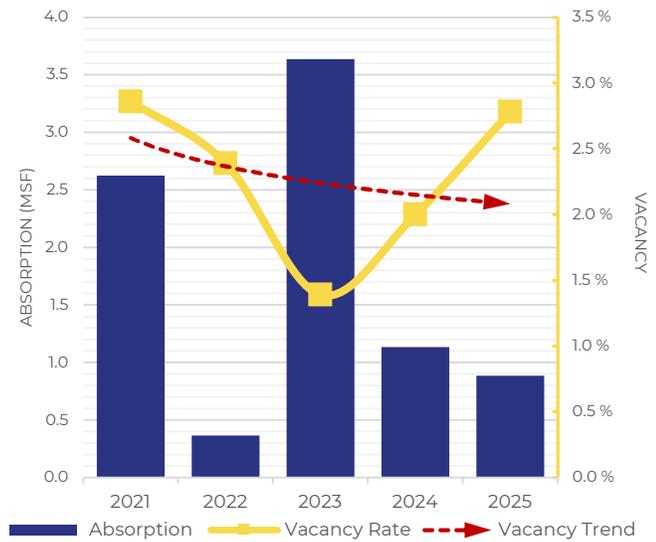
Expectedly, 2025 delivered record low total sales of just over \$70M, a 38% decrease from 2024. This trend is most significant among Class A assets, which saw a 71% decline in total sales from 2024. However, average price/SF paid for Class A properties rose 19% in the last two years, indicating this cooling trend is likely attributed to economic forces restricting lending rather than a shift in demand for quality inventory.

Nationally and locally, small bay facilities have gained favor with landlords and tenants for their cost-effectiveness, flexibility, proximity for last mile fulfillment and larger, more diverse tenant pools. And despite dynamic leasing activity, shrinking unit sizes for all classes hindered absorption growth in Q4, ending the year on a positive yet modest absorption just over 884K SF.

The construction pipeline gained another 1.6M SF of proposed projects in Q4. Two of these projects are positioned to gain the logistics advantage of the north-south artery I-83, which has been the focus of industrial business park development in York County.

York-based Gateway Logistics is developing a 301,500 SF warehouse along Mt. Airy Rd in Hopewell Township. Also, The Hanover Company, a private real estate company from Texas, broke ground on Locust Point Park Industrial in Conewago Township. It is expected to deliver in 2027 and will include a 423,000 SF cross-dock facility and a 285,000 SF front load building.

NET ABSORPTION & VACANCY



SF LEASED & AVG LEASE RATE



Key Sale Transactions

300 N Sherman St, York

SIZE	45,273 SF
SELLER	Sherman Ave Holdings LLC
BUYER	RSKL Real Estate Holdings LLC
PRICE	\$2,850,000

24-26 Parkway Blvd, York

SIZE	12,540 SF
SELLER	Shiple Family LP
BUYER	RE Michel Company LLC
PRICE	\$950,000

20 E Eleventh Ave, York

SIZE	7,763 SF
SELLER	Barry Shelly
BUYER	Prosper Development LLC
PRICE	\$715,000

217 E Maple St, Dallastown

SIZE	19,348 SF
SELLER	Myers Holdings Inc
BUYER	Dallastown Borough
PRICE	\$600,000

1678 Prayer Mission Rd, Windsor

SIZE	6,360 SF
SELLER	Jim Billet Welding LLC
BUYER	Key Global Properties LLC
PRICE	\$385,284

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

500-550 Willow Springs Ln, York

SIZE	270,867 SF
TENANT	Crane Worldwide Logistics
TRANSACTION	New

400 E Locust St, Dallastown

SIZE	58,865 SF
TENANT	recyclops
TRANSACTION	New

100 Redco Ave, Red Lion

SIZE	17,422 SF
TENANT	AdaptivAir Inc
TRANSACTION	New

4691 Raycom Rd, Dover

SIZE	16,145 SF
TENANT	Istech Inc.
TRANSACTION	Renewal

80 Redco Ave, Red Lion

SIZE	15,275 SF
TENANT	Finish Line Auto Body Red Lion
TRANSACTION	New



MARKET REPORT

OFFICE | YORK COUNTY, PA | Q3 2025



INVENTORY (SF)	VACANCY RATE	SALES (\$)	SALES (SF)	LEASED (SF)	RENT CHANGE
13.58M ↑	2.42% ↓	\$3.69M ↓	56,821 ↓	41,988 ↑	+\$0.21 ↑ <i>12-month rolling avg</i>

Co-Working Recalibration Seen in Leasing Trends

HIGHLIGHTS

- Q3 leasing trends shifted towards smaller, flexible offices and increased overall lease rates by 22% from Q2
- 2550 Kingston Rd in York sold for \$2.15M (\$49.77/SF) and is the largest transaction YTD. The new owners plan to complete building updates and lease out the executive offices
- Supply chain specialist BDP International, Inc. relocated to 3501 Concord Rd and will occupy over 23,000 SF of Class A office space

OVERVIEW

There was a second consecutive quarter of average sale price growth, but the overall four-year declining trend was unaltered.

Higher borrowing costs and interest rates muted sale activity in local and national markets, and it is unlikely this trend will reverse by end of year with Q3 closing amid a government shutdown.

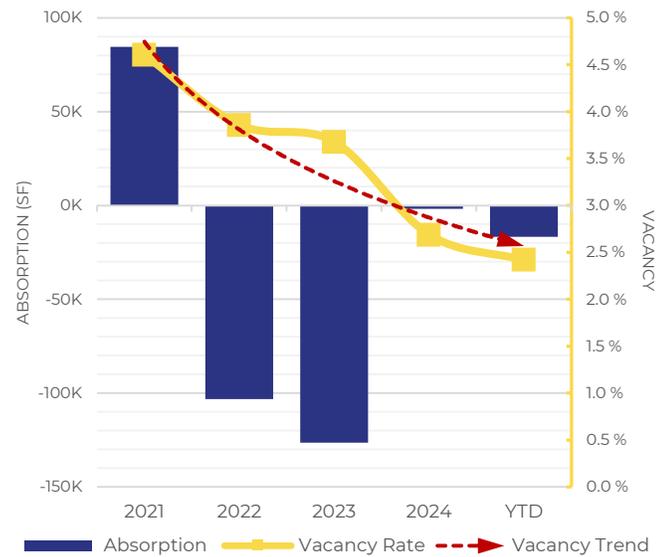
Shrinking unit sizes slowed absorption despite stable lease activity but respectively contributed to notable average lease rate growth now at \$13.56/SF.

Demand for modern flexible office space prioritized conversions, updates and expansion projects over new construction.

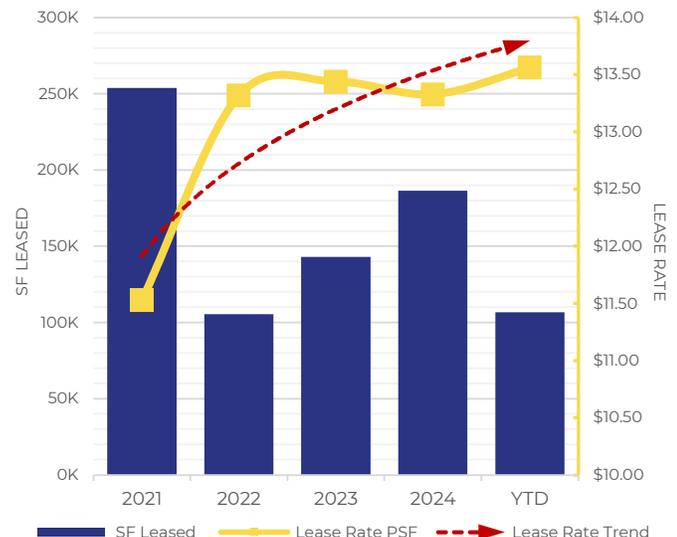
Wagman completed renovation of their new headquarters at 3265 Farmtrail Road in Manchester Township. The new, custom designed space will serve as administrative offices for multiple service lines. Embracing collaborative office trends, updates to the property included incorporating advanced technologies, adding modern amenities for staff, and new utilities systems.

The final beam was placed in the construction of WellSpan York Hospital's new surgical tower, as part of their initiative to improve and expand access and quality of advanced healthcare services to the community.

NET ABSORPTION & VACANCY



SF LEASED & AVG LEASE RATE



Key Sale Transactions

2550 Kingston Rd, York

SIZE	43,200 SF
SELLER	Arcadian Corporation NV
BUYER	2550 Kingston LLC
PRICE	\$2,150,000

300 N Baltimore St, Dillsburg

SIZE	3,932 SF
SELLER	Panco Realty LLC
BUYER	300 N Baltimore LLC
PRICE	\$555,000

1601 S Queen St, York

SIZE	5,505 SF
SELLER	MDCI Realty
BUYER	Be Above The Line, LLC
PRICE	\$520,000

835 Edgewood Rd, York

SIZE	1,312 SF
SELLER	Teldarfox, LLC
BUYER	Atlantic Theory LLC
PRICE	\$260,000

300 E Main St, Dallastown

SIZE	2,872 SF
SELLER	Gregg J & Susan M Basile
BUYER	CS Interiors LLC
PRICE	\$209,000

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

3501 Concord Rd, York

SIZE	23,148 SF
TENANT	BDP International, Inc.
TRANSACTION	New

1805 Loucks Rd, York

SIZE	6,856 SF
TENANT	BAPS Auto Paint Supply
TRANSACTION	New

2641-2651 Carnegie Rd, York

SIZE	3,000 SF
TENANT	Grane Hospice Care, Inc.
TRANSACTION	New

2951 Whiteford Rd, York

SIZE	2,395 SF
TENANT	Proface Business Services, Inc.
TRANSACTION	New

2756 S Queen St, Dallastown

SIZE	1,900 SF
TENANT	Wendy Erdenbrack, CPA
TRANSACTION	Renewal



MARKET REPORT

OFFICE | YORK COUNTY, PA | Q4 2025



INVENTORY (SF)	VACANCY RATE	SALES (\$)	SALES (SF)	LEASED (SF)	RENT CHANGE
13.56M ↓	*3.26% ↑	\$2.93M ↓	30,068 ↓	15,208 ↓	+\$0.29 ↑ <i>12-month rolling avg</i>

Vacancy Stabilized Below 4% for a Fourth Year

HIGHLIGHTS

- While national office vacancy lingers near 20%, York County office vacancy has remained below 4% for the last four years
- Overall average unit sizes shrunk 29% and demand for smaller units < 1K SF grew average rents by 20% YOY
- Offering cost-effective options and potential for adaptive reuse, Class C properties were the only class to see improved average sale prices, up 20% from 2024

OVERVIEW

A mixture of restricted lending, high operational costs and hybrid work models slowed Class A sale transactions through the last half of 2025. However, lower interest rates opened access to capital in Q4, with further lowering anticipated in 2026. Combined with reliable demand and stability of vacancy and lease rate growth, the 2026 recovery outlook for the local office sector is positive.

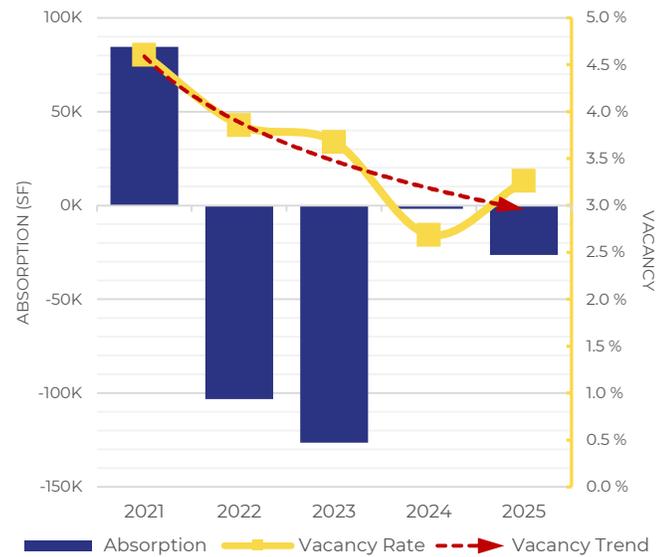
At the beginning of 2025, the average unit size for office space leased was just over 3,500 SF, but that average shrunk to just over 1,500 SF by the end of Q4. Remarkably, this was coupled with Class A average unit sizes reaching an all-time high and exceeding 8,300 SF, an impressive overall increase of 220% from 2022-2025.

While these contradictory trends coordinated to stabilize vacancy below 3% for a sixth consecutive quarter, they also hindered absorption recovery through the year. Class A assets represent the majority of inventory but account for less than 20% of new leases signed each year. Comparatively, nearly 70% of new leases signed and 64% of current vacant space is Class B.

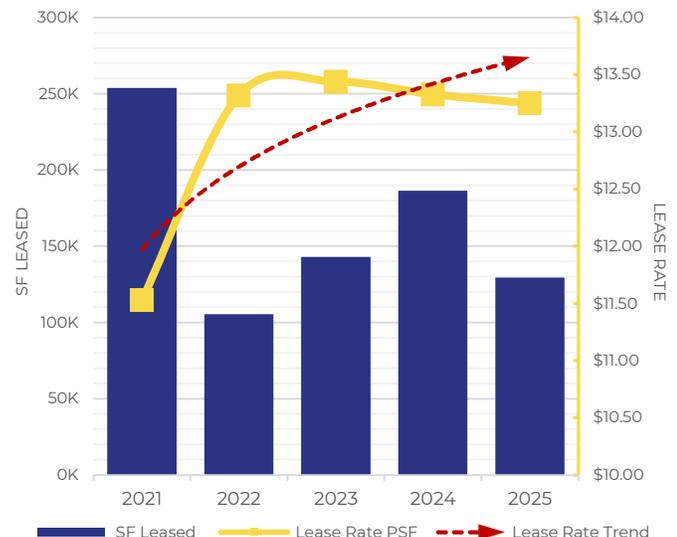
This abundance of smaller, Class B offices has historically fueled leasing activity and made local markets ideal for co-working models which thrive on cost-effectiveness and flexibility. Over the last five years, units less than 1K SF have gained a notable foothold within leasing, with substantial growth in average lease rates of 146% since 2020, and 28% just in the last year.

*Vacancy has been retroactively updated to reflect the most accurate office vacancy rate as of February 2026

NET ABSORPTION & VACANCY



SF LEASED & AVG LEASE RATE



Key Sale Transactions

1205 E Market St, York

SIZE	7,806 SF
SELLER	Shadowfax Corporation
BUYER	PA Child Corporation Inc.
PRICE	\$650,000

1512 E Market St, York

SIZE	4,200 SF
SELLER	KKMS Inc.
BUYER	Area Holdings LLC
PRICE	\$375,000

1550 E Market St, York

SIZE	2,551 SF
SELLER	Hamberger White Accountants
BUYER	Cody Gehman
PRICE	\$360,000

221-1WBc W Philadelphia, York

SIZE	3,253 SF
SELLER	Comcast
BUYER	PA PennMar Properties
PRICE	\$275,000

2214 S Queen St, York

SIZE	1,280 SF
SELLER	Dr. Craig Bradley
BUYER	R&R Sweet Home Investments
PRICE	\$225,000

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

190 E Canal Rd, York

SIZE	6,500 SF
TENANT	Name Withheld
TRANSACTION	New

195 Leader Heights Rd, York

SIZE	2,054 SF
TENANT	Aesthetic Professionals LLC
TRANSACTION	New

2797 S Queen St, Dallastown

SIZE	1,800 SF
TENANT	York PA Caregiving, LLC
TRANSACTION	New

1422 W Market St, York

SIZE	1,200 SF
TENANT	Name Withheld
TRANSACTION	New

2550 Kingston Rd, York

SIZE	1,133 SF
TENANT	Holcomb Associates Inc.
TRANSACTION	New



MARKET REPORT

RETAIL | YORK COUNTY, PA | Q3 2025



INVENTORY (SF) **27.33M** ↑ VACANCY RATE **4.23%** ↑ SALES (\$) **\$32.19M** ↑ SALES (SF) **225,262** ↑ LEASED (SF) **44,936** ↑ RENT CHANGE **+\$0.14** ↑
12-month rolling avg

Investment Properties Fueled Sale Transactions

HIGHLIGHTS

- Q3 investment sales brought YTD total sales 7% above 2024 year-end totals
- Cooling trends continued to stabilize lease rate growth, but reliable demand grew 12-month rolling average by 17%
- Shortly after BAM!'s announcement that their Whiteford Rd location in York will transform into a 2nd & Charles, the 33,000 SF of retail space next door, formerly Big Lots, was successfully leased to Savers

OVERVIEW

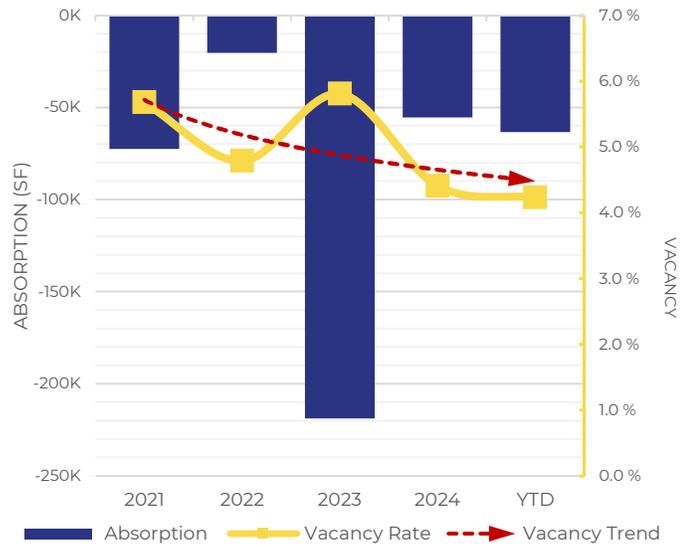
Overall low leasing activity YTD failed to outpace an influx of larger vacancies over 5K SF that entered the market in Q3, including former Rite Aid pharmacy spaces. Absorption's recovery during the first half of the year was reversed, and overall vacancy ticked up 5 bps to 4.23%.

Investment sales accounted for 88% of Q3's total sales, conveying national tenants like Dollar General and Sherwin Williams, and resulting in a 50% increase to overall average sale price to just over \$2M. Much of this activity was fueled by shopping center properties, especially three major transactions:

Property	Anchor Tenant	Sale Price	Sale Price/SF	Total Area
Dover Marketplace, Dover Township	Giant	\$16.4M	\$276.25	59,276 SF
Stillmeadow Plaza, Manchester Twp	None	\$3.6M	\$150.00	24,000 SF
East Market Plaza, Springettsbury Twp	None	\$3.4M	\$181.28	18,755 SF

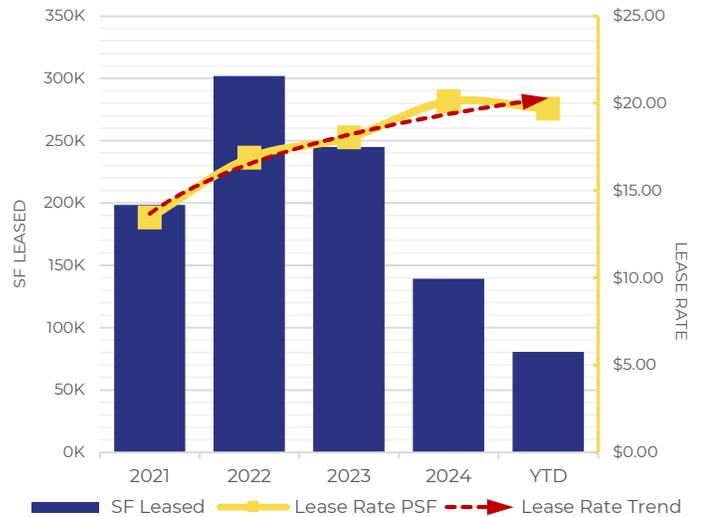
In tandem with investment activity, several redevelopment transactions contributed to impressive Q3 sale totals and helped keep projects moving through the pipeline. Former Barnhart's Inn at 3021 E Market St in York sold to Shiny Shell Car Wash who plans to build and open their new location by spring 2026. Former Zarfoss furniture at 21 W Broadway in Red Lion sold and will become a 29-unit loft style apartment building with two retail storefronts. Site work has already begun to construct a Taco Bell on a recently sold 2.22 acre pad site adjacent to the Tractor Supply in Red Lion.

NET ABSORPTION & VACANCY



* Absorption & Vacancy for Class A, B & C

SF LEASED & AVG LEASE RATE



* SF Leased includes Class A, B & C | Lease rate includes Class A & B only

RETAIL

YORK COUNTY, PA

Q3 2025

Key Sale Transactions

2130 Palomino Rd, Dover

SIZE	59,276 SF
SELLER	Dover GF LP
BUYER	United Hampshire US REIT
PRICE	\$16,375,000

555 Ryan Run Rd, York

SIZE	24,000 SF
SELLER	Ryan Run Properties LP
BUYER	Trone Family Trust
PRICE	\$3,600,000

3915-3945 E Market St, York

SIZE	18,755 SF
SELLER	East Market Street Group LLC
BUYER	East Market Street Plaza RE LLC
PRICE	\$3,400,000

4291 Delta Rd, Airville

SIZE	10,640 SF
SELLER	CD DG Sunnyburn LLC
BUYER	R&M Management Services LLC
PRICE	\$1,823,000

38 Memory Ln, York

SIZE	4,000 SF
SELLER	Radar SW York LLC
BUYER	L&T Investors, LLC
PRICE	\$1,022,500

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

2960-3000 Whiteford Rd, York

SIZE	33,000 SF
TENANT	Savers
TRANSACTION	New

960 North Hills Rd, York

SIZE	6,000 SF
TENANT	Autopart International, LLC
TRANSACTION	Renewal

2131-2139 Industrial Hwy, York

SIZE	4,194 SF
TENANT	Revolution Dancewear, LLC
TRANSACTION	Extension

18 S George St, York

SIZE	3,815 SF
TENANT	Grandpa Joe's Candy Shop
TRANSACTION	New

2131-2139 Industrial Hwy, York

SIZE	2,047 SF
TENANT	Michael Kowalski
TRANSACTION	Renewal



MARKET REPORT

RETAIL | YORK COUNTY, PA | Q4 2025



INVENTORY (SF)	VACANCY RATE	SALES (\$)	SALES (SF)	LEASED (SF)	RENT CHANGE
27.30M ↓	4.29% ↑	\$12.52M ↓	121,439 ↓	14,295 ↓	-\$0.03 ↓ <i>12-month rolling avg</i>

Market Momentum Sustained Despite Softening Trends in Q4

HIGHLIGHTS

- A 1.35 acre tract of land off W Lincoln Hwy in Jackson Township sold in November will become a Dunkin' by summer 2026
- Sale totals improved for a third year following several major automotive property transactions throughout the year and median sale prices rose 12% from 2024
- Leasing activity from 2022-2025 revealed a decline in Class A and B leasing

OVERVIEW

Tariffs and trade policy uncertainties combined with a Q3-Q4 government shutdown caused disruptions and delays for long-term decisions within the retail sector. Wavering consumer confidence softened demand in the second half of the year, but market momentum was maintained by local economic resilience.

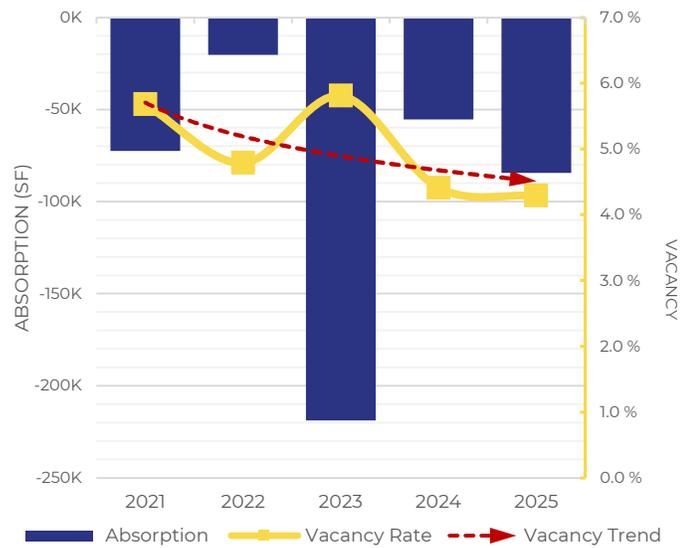
Service-based retail remained the main drivers of sale activity throughout the year. Automotive properties, including sales, service and gas stations, accounted for a third of the \$95.6M in total sales in 2025 and maintained average sale prices over \$1M for a second consecutive year.

Average unit sizes remained around 3K SF for a third year, and overall average lease rates lowered to \$17.93/SF. This stabilization followed four years of significant growth within average lease rates, up 46% from 2021-2025.

Broken down by subtype, shopping centers have been the exception to this growth trend, with average rents stabilized between \$16.80 - \$18.00/SF for the last five years. And when broken down by class, Class C average rents have hovered between \$14.00-\$15.00/SF since 2021. The proven reliability and resilience of these two asset types is expected to continue, with anticipated growth in 2026 as tenants continue seeking cost-effectiveness and adaptability.

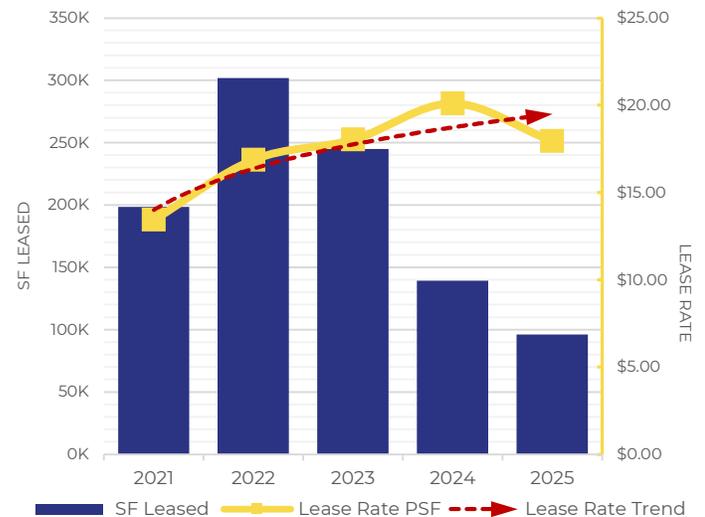
Work neared completion for West York's redevelopment project to convert a former bakery building into a mixed-use retail destination. The Bakery Project was partially funded by grants from DCED (Department of Community & Economic Development) and will bring 52,000 SF of experience-based retail attractions including food vendors, arcades, live events and automotive services from a rear garage.

NET ABSORPTION & VACANCY



* Absorption & Vacancy for Class A, B & C

SF LEASED & AVG LEASE RATE



* SF Leased includes Class A, B & C | Lease rate includes Class A & B only

RETAIL

YORK COUNTY, PA

Q4 2025

Key Sale Transactions

1955 Whiteford Rd, York

SIZE	12,560 SF
SELLER	Gradison Management LLC
BUYER	LTW LLC
PRICE	\$1,950,000

257 N Main St, Jacobus

SIZE	13,030 SF
SELLER	Grim Reaper Holdings LLC
BUYER	Werner Bros Auto Sales
PRICE	\$1,400,000

15180 Barrens Rd, Stewartstown

SIZE	20,375 SF
SELLER	Genesis Motor Werks Inc
BUYER	Hess Holdings Company LLC
PRICE	\$1,095,000

3608 E Market St, York

SIZE	3,125 SF
SELLER	Boardwalks Properties LLC
BUYER	3608 E Market LLC
PRICE	\$990,000

35 Kirkland Dr, Red Lion

SIZE	9,246 SF
SELLER	Kirkland Drive Associates
BUYER	35 Kirkland Drive LLC
PRICE	\$950,000

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

2155 White St, York

SIZE	1,795 SF
TENANT	Oletowne Jewelers Inc.
TRANSACTION	Renewal

2811-2813 E Prospect Rd, York

SIZE	1,500 SF
TENANT	Michael Piragnoli
TRANSACTION	New

30-40 W Eleventh Ave, York

SIZE	1,040 SF
TENANT	Jay Skinz Tattoo LLC
TRANSACTION	New

4320 N George St, Manchester

SIZE	800 SF
TENANT	Krapf Bus Company
TRANSACTION	New

38 S Beaver St, York

SIZE	522 SF
TENANT	Editionstyles Vintage Shop
TRANSACTION	New



YORK COUNTY TRENDS

ALL SECTORS

CREATED MARCH 2026



QUARTER-TO-QUARTER

Q3 2025 → Q4 2025 Comparison

SECTOR	ABSORPTION (SF) Q3 2025	ABSORPTION (SF) Q4 2025	Q2Q CHANGE	LEASE RATE/SF Q3 2025	LEASE RATE/SF Q4 2025	Q2Q CHANGE
Office	-10,729	-36,833	▼ -26,104	\$13.56	\$13.25	▼ -2.3%
Industrial	2,743	47,390	▲ +44,647	\$6.90	\$6.71	▼ -2.8%
Retail	-21,548	-32,515	▼ -10,967	\$19.67	\$17.93	▼ -8.8%

YEAR-OVER-YEAR

Full Year 2024 → 2025 Comparison

SECTOR	AVG RENT/SF 2024	AVG RENT/SF 2025	YOY CHANGE	AVG UNIT SIZE 2024	AVG UNIT SIZE 2025	YOY CHANGE	2025 YTD ABSORPTION (SF)
Office	\$13.33	\$13.25	▼ -0.6%	2,999	2,133	▼ -28.9%	-26,298
Industrial	\$6.06	\$6.71	▲ +10.7%	24,698	16,251	▼ -34.2%	884,685
Retail	\$20.01	\$17.93	▼ -10.4%	2,963	3,098	▲ +4.6%	-84,454

Conclusion

Methodology & Assumptions

A. Purpose

This appendix documents the inputs, calculations, and planning logic used to arrive at the recommended housing-led, walkable mixed-use (TND) spine with targeted employment for the Cape Horn/Windsor Road corridor. It is intended to make the allocation choices auditable and reproducible.

B. Study Inputs & Data Sources

Core inputs used in allocation decisions:

1. Study Area & Scope

- Corridor limits, study tasks, and deliverables per the approved Scope of Work.

2. Population & Housing Demand

- Townshipwide housing need adopted for this study: 2,314 units (2020–2050).
- Supporting parameters from the demographic workbook (e.g., average household size 2.65) were used to validate need calculations and to correlate population to housing units.

3. Transportation Conditions & Scenario Trip Generation

- AADT / ADTT on SR-24 and cross streets; warehouse vs. TND trip-generation scenarios; and regional commuting shares.

4. Market Conditions (Retail–Office–Industrial)

- Q3→Q4 2025 metrics for absorption, vacancy, lease rates, and unit-size trends (ROCK Commercial reports and summary tables).

5. Zoning & Use Reconciliation (Latent Capacity)

- Table of parcels ≥ 2 acres that are vacant or in agricultural use within non-Agricultural zoning districts (Industrial, Commercial, Residential, RR, MD).

6. Statewide Supply–Affordability Context

- Pennsylvania’s underbuilding vs. national benchmarks and the affordability implications (Pew Charitable Trusts issue brief).

C. Establishing the Housing Program

1. Townshipwide Need

The analysis adopts 2,314 units (2020–2050) as Windsor Township’s planning target for new housing. This is consistent with the demographic framework (household formation and average household size 2.65) used to translate population to units.

2. Corridor Capture

To support a walkable mixed-use center while avoiding over-concentration, the corridor is set to absorb 35–45% of townshipwide need:

Corridor Units="Township Need"×35%-45%=2,314×(0.35-0.45)≈810-1,040 units

This band balances:

- Placemaking (enough households to support main-street services);
- Transport limits (not overloading SR-24); and
- Equity of growth (leaving room for MD-zoned and infill areas).

3. Residential Mix (Corridor Units Only)

Within 810–1,040 units, a three-part mix was selected to broaden housing choice:

- 40–50% townhomes & stacked townhomes
- 25–35% apartments (3–4 stories; some over retail)
- 15–25% small-lot single-family/cottages

Rationale: This increases “middle housing,” addressing Windsor’s predominantly low-density base and limited multifamily, while supporting a walkable main-street environment. (Market: soft retail, small-suite office; strong small-bay industrial.)

D. Translating Units to Land (Corridor Land Budget)

1. TND Densities & Block Typologies

We used gross densities across the residential portion of the corridor, assuming a mix of block types (neighborhood streets, small parks, stormwater, civic sites):

- Average gross density: ~4–6 du/ac at the TND neighborhood scale (higher on mixed-use blocks; lower on edges).
- Residential acreage needed for 810–1,040 units: ~160–190 acres (range flexes with unit mix and block design).
- Main-street/mixed-use blocks: ~25–35 acres (ground-floor retail/services with upper-floor apartments).
- Parks, stormwater, greenways, schools/childcare: ~30–45 acres (to ensure livability, capture runoff, and meet civic needs).

Check:

Units ≈ "Res Acres" × "Gross DU/ac" ⇒ 160-190 ac × 4-6 DU/ac ≈ 640-1,140 units
(matches target after mix tuning)

2. Retail Node Sizing

Given selective retail demand (negative absorption in late 2025; rent compression), retail is right-sized to 10–20 acres in one or two nodes (not a linear strip). Retail is local serving and integrated with upper-floor housing or small offices.

E. Targeted Employment (Flex / Clean Industrial)

1. Why Flex (Not Mega-Logistics)

- Industrial remains the strongest sector countywide but is increasingly small-bay/flex (average leased unit sizes down 34% YoY; vacancy still tight).

- A 1,000,000-SF warehouse would add ~1,618 daily trips with 547 truck trips (34%), concentrating trucks to I-83/US-30 and exceeding corridor tolerance; TND trips, while more numerous overall, are passenger-heavy and can be dispersed.

2. Land & FAR Assumptions

3. Flex is land-hungry (single-story, docks, courts, stormwater). For planning-level yield checks, use an effective FAR band of 0.15–0.35:

- 40 acres → site area 1.74M sf → ~0.26–0.61M sf of flex
- 80 acres → site area 3.49M sf → ~0.52–1.22M sf of flex

This band reflects typical light-industrial site planning once loading, circulation, and open space are included.

Allocation: 40–80 acres of buffered flex in 1–2 nodes with direct SR-24 access and signed truck routing.

F. Transportation Basis & Phasing Triggers

1. Existing Conditions & Scenario Loads

- SR-24 carries ~32,202 ADT (13% trucks) north of Windsor Rd and ~13,718 ADT (5% trucks) south; cross streets (Windsor, Freysville, Lombard) add meaningful turning volumes.
- Warehouse scenario: ~1,618 vpd, ~547 trucks (34%).
- TND scenarios: ~8,684 / 17,911 / 30,294 vpd (low/med/high), multidirectional.

2. Phasing Triggers (Release by Readiness)

No phase opens until:

- Intersection upgrades are constructed at identified hot-spots (turn lanes/queue storage, protected left-turn phasing, access management).
- Safety: Crash mitigation elements at SR-24 nodes are delivered.
- Absorption: Prior phase achieves stable lease-up/sales; retail node vacancy ≤4–6% for 4–6 consecutive quarters before adding new retail space (to avoid overbuild).

G. Zoning–Use Reconciliation (Latent Capacity)

1. What the Table Shows

A large share of land mapped for development (Industrial, Commercial, Residential, RR, MD) is still vacant or farmed in parcels ≥2 acres, indicating latent capacity inside today’s zoning:

2. How It Informed Allocations

- The presence of ~207.8 ac in General Commercial that is vacant/Ag validates right-sizing the corridor’s commercial entitlement towards mixed-use housing and limited flex, not more strip commercial.

- 460.2 ac in MD provides a by-right path to deliver middle housing (outside the corridor) without converting agricultural districts.
- ~256.1 ac in Industrial (vacant/Ag) allows small-bay/flex supply within existing zoning, reducing pressure to add new industrial zones.

H. Market Alignment Tests (Retail–Office–Industrial)

- Retail: Late-2025 saw negative absorption and rent declines, supporting small node(s) rather than corridor-wide entitlements.
- Office: Vacancy <4% locally with demand shifting to small suites/upper-floor; the plan embeds office over retail instead of stand-alone office parks.
- Industrial: Strong performer; leasing shifted to small-bay; our flex allocation matches this trend and avoids mega-logistics.

I. Affordability & Supply Logic

Statewide research shows that when production lags, costs rise. Pennsylvania ranked 44th for added units (2017–2023) and saw rents rise ~46% in tracked counties; places permitting more housing experienced slower rent growth. The corridor TND and MD pipeline enable context-sensitive supply in serviced areas, helping moderate local cost pressures without extending growth into rural lands.

J. Sensitivity Checks (What Could Change the Ranges?)

1. Corridor capture $\pm 10\%$
 - If final capture = 30–50% of 2,314 units, corridor units range 695–1,157. Land needs shift accordingly (\pm density tuning).
2. TND density ± 1 du/ac
 - At 4 du/ac average, residential acres rise toward the upper end; at 6 du/ac, acres fall toward the lower end (open-space and civic targets maintained).
3. Flex FAR band 0.15–0.35
 - At 0.15 FAR, 40 ac yields 0.26M sf; at 0.35 FAR, 80 ac yields 1.22M sf. Use site planning to keep truck impacts within SR-24 capacity.
4. Retail triggers
 - If node vacancy exceeds 6–8% or absorption is negative for ≥ 2 quarters, pause additional retail footage; re-test market.

K. Implementation Checklist (From Allocation to Entitlements)

1. Adopt a TND/Mixed-Use zoning district (or form-based standards) for the corridor; embed frontage types, block lengths, and ground-floor activation.
2. Map 1–2 retail nodes (10–20 ac total) with upper-floor residential; prohibit deep commercial strips.

3. Designate 1–2 flex pods (40–80 ac total) with buffers; record truck routes to SR-24/I-83/US-30.
4. Access management plan for SR-24 intersections (protected lefts, turn lanes, driveway consolidation) prior to phase release.
5. Parcel-level Zoning × Use reconciliation to confirm which commercial acres are truly vacant vs. farmed, then stage conversions to mixed-use blocks.
6. Phasing triggers tied to infrastructure, safety, and absorption (Section F2).