



Land Use Assumptions Report

New Garden Township
Chester County, Pennsylvania

DRAFT FOR STAKEHOLDER AND PUBLIC REVIEW – March 2025

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Introduction

New Garden Township intends to establish a transportation impact fee that will allow the township to collect fees from developers for a portion of the cost of off-site roadway capital improvements associated with new development and redevelopment. Transportation impact fees are enabled and regulated by Act 209, which amended the Pennsylvania Municipalities Planning Code (MPC) to allow for such fees to be assessed. Act 209 requires that a municipality wishing to enact a transportation impact fee complete several tasks to establish the fee, one of which is this Land Use Assumptions Report (LUAR).

The intent of the LUAR is to provide a view of anticipated future development in New Garden Township and specifically within the designated Transportation Service Area (TSA) over the next 10 years. This 10-year “build-out” will then serve as the foundation for the township’s next steps in the Act 209 process, including the Roadway Sufficiency Analysis (RSA) and the Transportation Capital Improvement Plan (TCIP).

This LUAR contains the following elements:

- Description of the TSA and the roadway network within it;
- An inventory of existing land uses in the township;
- An inventory of approved and pending development;
- Review and analysis of population and employment projections; and
- An analysis of expected development potential over the next 10 years and beyond.

The development of this report was guided by the township’s Transportation Impact Fee Advisory Committee (TIFAC) along with the input of township staff and the township’s consultants, Bowman. The TIFAC was convened on two occasions for the purpose of developing and refining the LUAR, as well as other assumptions for the RSA traffic analyses. As required by Act 209, this LUAR, as drafted in T, was forwarded for review to all surrounding municipalities as well as to the Kennett Consolidated School District and the Chester County Planning Commission. A public hearing was duly advertised and held by the New Garden Township Board of Supervisors on **MONTH DATE**, 2025. The Board considered and adopted this Land Use Assumptions Report on **MONTH DATE**, 2025.

Transportation Service Area (TSA) and Roadway Network

The TSA within New Garden Township encompasses about 6.96 square miles and is depicted on **Map 1**. It captures the parcels in the township with the most development potential, particularly with regard to the presence of existing infrastructure to support new development. Where possible, it excludes land that will not be developed, such as protected open space and municipal parks. In addition, 23 intersections within the TSA have been identified for inclusion in the subsequent RSA.

According to the most recent PennDOT Type 5 Map (last revised April 2023) there are 85.73 total miles of roadway in New Garden Township. Of these, 60.85 miles are owned and maintained by the township while 24.88 miles are owned and maintained by PennDOT. The characteristics of the roadway network are described in detail below, organized by functional classification, and shown in **Map 2**.

Within the township boundaries, US Route 1 functions as a limited access expressway, traversing the northern edge of the township in an east-west orientation. It carries significant regional traffic volume through southern Chester County and beyond. US Route 1 is accessed from New Garden via an interchange at Newark Road (SR 3033). The interchange area, along with the rest of Section 210 of US Route 1, is scheduled to be reconstructed by PennDOT beginning in 2028.

Gap Newport Pike (SR 41) is a principal arterial that cuts across New Garden from its western to southeastern boundaries. Trucks account for nearly 15% of its traffic volume within New Garden, many of which use the corridor to travel between the Port of Wilmington and other roadway connections such as US Route 1 and US Route 30, as well as to serve the region's mushroom industry. Limestone Road (SR 3013) is also a principal arterial.

Baltimore Pike (SR 3046) functions as a minor arterial within New Garden, traversing the northern section of the township roughly in parallel with US Route 1. It serves the Village of Toughkenamon as well other regional and local trips between Avondale and Kennett Square.

Several roadways in the township function as major collectors, including Newark Road (SR 3033), Hillendale Road, Church Road (SR 3035), Penn Green Road (SR 3009 for segment south of SR 41), Kaolin Road (SR 3013), Sunny Dell Road (SR 3024), Landenberg Road (SR 3024), and Chesterville Road (SR 3024).

All other roads in the township are classified as local roadways, which carry lower volumes of traffic at lower speeds and primarily serve as connections between residential areas and the roadway network described above.

Existing Land Use

Data on existing land use was obtained through the Delaware Valley Regional Planning Commission (DVRPC), which every five years produces land use data for the nine-county greater Philadelphia area. The data is based on digital orthophotography created from aerial surveillance completed in the spring of 2023. It is presented below without modification. However, in subsequent steps, existing and potential future land uses were evaluated at a parcel level with the input of township staff and the TIFAC.

New Garden Township is primarily characterized by agricultural and residential land uses, which together account for nearly 60% of land use in the municipality. Areas designated as agricultural include numerous facilities that are involved in southern Chester County's expansive mushroom industry, with such businesses concentrated along sections of Penn Green Road (SR 3009), Starr Road, and Hillendale Road, among other locations. Relative to residential land use, nearly all of New Garden's residential acreage (96%) takes the form of single family detached housing. Residential developments, most having a relatively low density, are dispersed throughout the township.

About one-fifth of New Garden's acreage is described as "wooded" in the DVRPC classification system. Land that is classified here as wooded can be publicly or privately held and it may or may not be protected from development. A separate dataset obtained from the Chester County Planning Commission (CCPC) provided information on protected parcels, which was used to help determine development potential in the township. **Table 1** provides a summary of existing land uses by size within New Garden Township. Existing land use patterns are further depicted on **Map 3**.

Table 1 - Existing Land Use in New Garden Township

Land Use	Acres	% of Total
Agriculture	3,091	29.7%
Single Family Detached Housing	2,857	27.4%
Wooded	2,137	20.5%
Undeveloped	557	5.3%
Roadways	342	3.3%
Commercial	326	3.1%
Golf Course	281	2.7%
Industrial	190	1.8%
Recreation	168	1.6%
Institutional	113	1.1%
Water	112	1.1%
Airport	100	1.0%
Multifamily Housing	73	0.7%
Mobile Home Park	32	0.3%
Utility	32	0.3%
Transportation Facilities	13	0.1%
Total	10,422	100.0%

Source: DVRPC

Approved and Pending Development

As of February 2025, there are several land development plans that are under review, approved, and/or in construction. While these developments will contribute to the township’s build-out, plans submitted prior to the approval of New Garden’s Act 209 resolution (February 26, 2024) will be exempt from the transportation impact fee that will result from the Act 209 process. Plans submitted after the approval of the Act 209 resolution, but prior to the adoption of the transportation impact fee, are subject to an interim fee. The tables below describe recent, larger approved and pending development.

In addition to the developments below in **Table 2**, another significant potential development is likely to move towards plan submission in the near future. Along Gap Newport Pike (SR 41) in the township’s southeastern corner, it is anticipated that a development plan will propose 430 to 480 residential units with 100,000 to 150,000 gross commercial square footage. The sites involved have been the subject of a previous development plan known as “White Clay Point”.

Table 2 - Active Residential Subdivision and Land Development Plans

Name	Single Family Detached Units	Townhome Units	Status
Stonebridge at Longwood	51	0	Approved
Copperleaf Ridge	0	98	Approved (in construction)
Church Street Mews	0	9	Approved
163 Sheehan Road	0	43	Under review
<i>Total Approved/Under Review Units</i>	<i>51</i>	<i>150</i>	

Table 3 - Active Non-Residential Subdivision and Land Development Plans

Name	Description	Square Feet	Status
S&P Conveyors	Warehouse	17,500	Approved (constructed)
New Garden Elementary School	New elementary school on existing site	105,240	Approved (in construction)
Popeye's	Fast-food restaurant with drive-through	2,402	Approved
160 Starr Road	New mushroom house replacing existing buildings	15,915	Approved
133 Starr Road	New composting bunkers on existing mushroom farm	6,647	Under review
163 Sheehan Road	New office building as part of a residential development	1,530	Under review
<i>Total Approved/Under Review Square Footage</i>		<i>149,234</i>	

Population and Employment Trends

As per the Pennsylvania MPC, land use assumptions reports must base their analyses on at least the prior five years of population change and a population projection of at least five years out from the current date. This LUAR uses 2023 population estimates from the U.S. Census Bureau as well as population projections for a 10-year period (2025-2035) based on data from DVRPC.

Historic growth trends for New Garden are shown in **Table 4**. The township experienced rapid population growth in the two decades from 1990 to 2010, more than doubling its total population in that period. According to the most recent estimates, the number of New Garden Township residents has declined by about 4.7% from its 2010 peak.

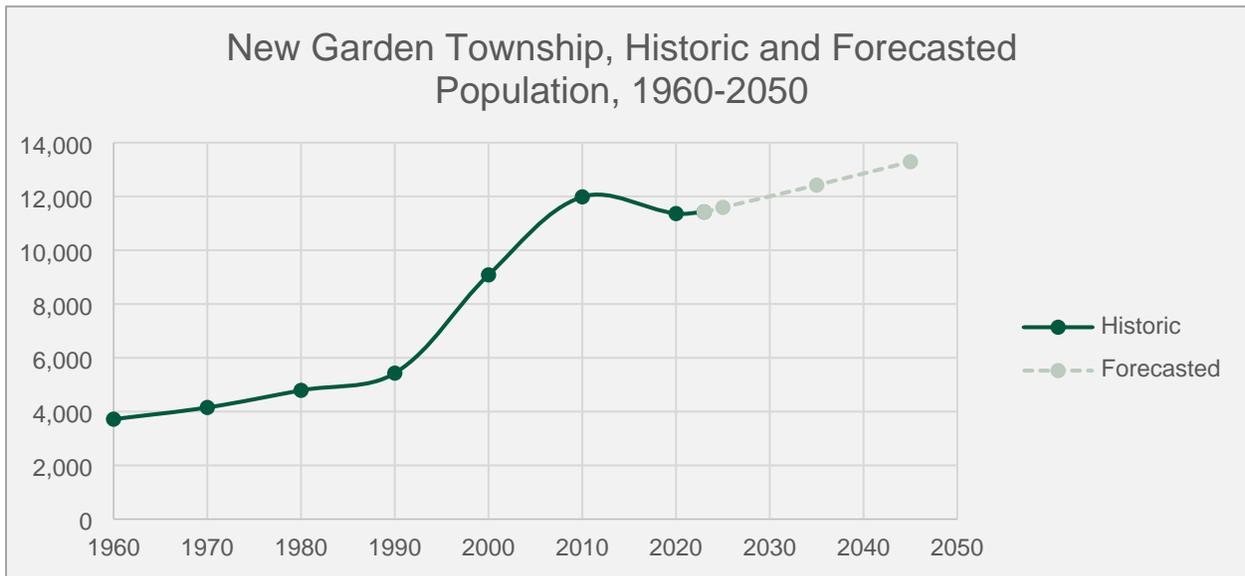
Table 4 - New Garden Township Population, 1960-2023

Year	Population	Absolute Change	Percent Change	Annual Percent Change
1960	3,718	-	-	-
1970	4,153	435	11.7%	1.17%
1980	4,790	637	15.3%	1.53%
1990	5,430	640	13.4%	1.34%
2000	9,083	3,653	67.3%	6.73%
2010	11,984	2,901	31.9%	3.19%
2020	11,363	-621	-5.2%	-0.52%
2023	11,423	60	0.5%	0.18%

Source: U.S. Census; American Community Survey

Relative to future growth, this report uses data from DVRPC, which produces population and employment forecasts that are based on statistical models as well as input from each of the nine counties in the greater Philadelphia area, the most recent of which was published in January 2023. At the time of publication, however, the 2020 Census figures had not yet been finalized and, accordingly, DVRPC used the American Community Survey estimates from 2015 and 2019 in their place. As per DVRPC guidance, the estimates have been adjusted to consider the 2020 U.S Census population total, which in New Garden’s case was ultimately lower than what was projected based on the 2015 and 2019 estimates. Figure 1 combines historic population figures with these adjusted DVRPC projections to visualize previous and anticipated trends. **Table 5** compares New Garden’s projected growth to that of neighboring municipalities and Chester County as a whole.

Figure 1 - Historic and Forecasted Population



Source: U.S. Census, DVRPC

Table 5 - Projected Population Change in New Garden, Surrounding Municipalities, and Chester County

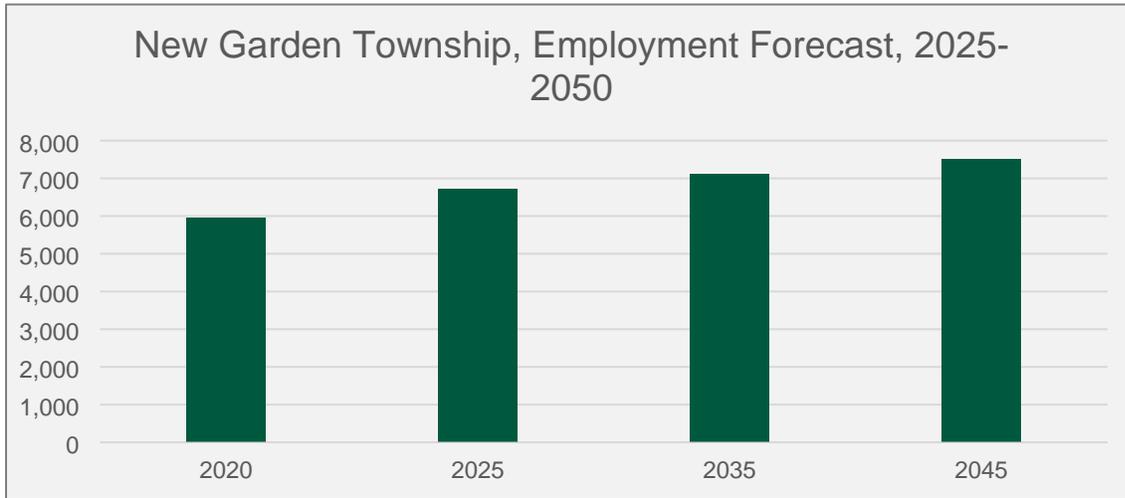
Municipality	2025 Population	2035 Population	Absolute Change	Percent Change	Annual Percent Change
New Garden Township	11,592	12,421	829	7.2%	0.72%
London Britain Township	3,184	3,279	95	3.0%	0.30%
Franklin Township	4,458	4,963	505	11.3%	1.13%
London Grove Township	9,016	10,163	1,147	12.7%	1.27%
Avondale Borough	1,279	1,352	73	5.7%	0.57%
West Marlborough Township	819	824	5	0.6%	0.06%
East Marlborough Township	8,034	9,010	976	12.1%	1.21%
Kennett Township	9,128	9,988	860	9.4%	0.94%
<i>Chester County</i>	<i>569,663</i>	<i>610,202</i>	<i>40,539</i>	<i>7.1%</i>	<i>0.71%</i>

Source: U.S. Census, DVRPC

DVRPC projects that New Garden's population will grow by about 0.72% each year from 2025 to 2035, which is nearly the same rate of increase that is projected for Chester County.

This report also considers projected changes in employment in its analysis. DVRPC projects that a little over 1,000 jobs will be added in New Garden Township between 2020 and 2035. This rate of job growth is higher than that of Chester County as a whole and roughly consistent with those of neighboring communities.

Figure 2 - Employment Forecast



Source: DVRPC

Table 6 - Projected Employment Change in New Garden, Surrounding Municipalities, and Chester County

Municipality	2025 Employment	2035 Employment	Absolute Change	Percent Change	Annual Percent Change
New Garden Township	6,718	7,113	395	5.9%	0.59%
London Britain Township	699	747	48	6.9%	0.69%
Franklin Township	965	1,037	72	7.5%	0.75%
London Grove Township	3,558	3,732	174	4.9%	0.49%
Avondale Borough	681	709	28	4.1%	0.41%
West Marlborough Township	377	386	9	2.4%	0.24%
East Marlborough Township	6,026	6,511	485	8.0%	0.80%
Kennett Township	6,739	7,002	263	3.9%	0.39%
<i>Chester County</i>	<i>336,321</i>	<i>351,403</i>	<i>15,082</i>	<i>4.5%</i>	<i>0.45%</i>

Assessment of Future Development Potential

The future development potential for the proposed TSA was assessed as part of this LUAR. The assessment was based on current development patterns, existing constraints, and zoning regulations. Two primary assessments were conducted: (1) potential development at ultimate build-out; and (2) potential development for the 10-year period (2025-2035).

Potential TSA Development at Ultimate Build-out

1,598 additional dwelling units + 18,362,051 square feet of added non-residential space

Potential TSA Development for 10-Year Period (2025-2035)

442 additional dwelling units + 2,852,964 square feet of added non-residential space.

Detailed summaries of the residential and non-residential development potential at ultimate build-out and for the 10-year planning period (2025-2035) are provided in Appendix A, which also includes an explanation of the methodology used.

Appendix A - Methodology

The future development potential for the proposed TSA was determined based on current development patterns, existing constraints, and zoning regulations to calculate the anticipated number of residential dwelling units and the square footage of non-residential development. Although the Village Center, Village Gateway, and Mixed-Use Corridor zones do permit residential development, none was assumed and all provide potential square footage for commercial development in lieu of residential units as there is a significant potential for residential development within the more restrictive residential zones. **Map 4** depicts township zoning as per the most recent iteration of its zoning update process.

In order to evaluate future development potential, a comprehensive review of all parcels within the transportation service area was undertaken. Existing land uses were based on DVRPC data as depicted on **Map 3**. All parcels which are protected open space as per Chester County's data or are zoned as Parks Open Space by New Garden Township were not included. Parcels which are of an insufficient area to support reasonably likely development within the zoning code were also not included. All parcels zoned as a residential use where the potential development was less than five units were not included in the projections for simplicity. Additionally, parcels which are currently occupied by a commercial, institutional, or industrial use which could not be redeveloped without demolition of existing structures were generally not included, except for those parcels where additional information regarding current operations indicates that redevelopment is likely.

Parcels which are currently used for agricultural purposes, but which are not developed, such as fields, were generally considered to have potential for development. Parcels currently used for agriculture and physically developed with mushroom houses, barns, or other physical structures were not included unless a significant portion of the parcel was undeveloped or information regarding current operations of the business indicates redevelopment to be likely. Furthermore, parcels without access to a public roadway were generally not considered unless they are adjacent to a parcel which has access and which is considered developable otherwise. Additional parcels were not included in this analysis beyond these criteria based on professional judgement.

In order to estimate development potential for each parcel, limitations due to site constraints were also considered. The Flood Hazard Overlay in the township's zoning code generally precludes construction of structures within the 100-year floodplain as defined by the Federal Emergency Management Agency (FEMA). Therefore, areas within the floodplain were not considered in the developable area for each parcel. Furthermore, all areas with a slope exceeding 25% were not considered in the developable area for each parcel as these slopes are exceedingly difficult on which to build. To be conservative, all areas which are currently impervious and occupied by structures or paving were not considered in the developable area for each parcel.

In order to account for parcel specific development needs, such as setbacks, on-site stormwater management facilities, roadways, parking, etc., only 65% of the developable area was considered to have development potential for all zones. In order to calculate residential yield within the Residential Flex Zone, properties were assumed to develop based on Option 1 – Traditional Development Pattern as described in the zoning code with an assumed average lot size of 0.25 acres (flexible minimum lot size, 0.5-acre maximum lot size). Calculated residential yield for the

Medium Density Residential Zone assume an average lot size of 8,000 square feet (0.18 acre, 5,000 square foot highest minimum lot size). Listed development potential considers maximum impervious coverage requirements but does not incorporate potential parking needs.

The 10-year build-out was developed with input from New Garden Township staff and the TIFAC, with evaluation of the potential for each of the parcels identified in the ultimate build-out to be developed within the next 10 years and the likely nature of such development. In order to account for the likelihood that many parcels will develop in phases or will subdivide (with some development happening within the 10-year build-out period and some occurring in the ultimate build-out) a percentage estimate was made relative to the 10-year build-out in each of the zoning districts in which non-residential development was projected (Enterprise – 10%, Mixed-Use Corridor – 20%, Village Center – 15%, and Village Gateway – 15%). Adjustments were then made to the development potential of the 10-year build-out parcels to align with the estimates for each of the zoning districts.

As an additional step, potential residential development was assessed in the context of DVRPC's population projections and the ACS average household size data for New Garden Township. As noted in the Population and Employment Trends section of this LUAR, DVRPC projects that the township's population will increase by 829 residents between 2025 and 2035. The average household size in New Garden is 2.84 persons, according to the most recent ACS data (2023). Using only these two data points, it would be projected that the township would add about 292 new residential units in the 2025-2035 period.

However, as this report notes in the Approved and Pending Development section, new residential development in various stages is already outpacing that estimate. The township has approved 158 new residential units, some of which are currently in construction. A plan for 43 additional units is under review and it is expected that development at White Clay Point will bring hundreds of new units to the township within the 10-year build-out period. These projects alone would produce well over the 292 units implied by the DVRPC projections and the ACS average household size calculation. Accordingly, the 10-year build-out projects a greater population increase than the DVRPC estimate. It also modifies the average household size in accordance with recent trends. The average household size in New Garden has declined from a recent peak of 3.15 person in 2014 to the current average of 2.84. This coincides with a broader, national shift towards smaller households. If current trends were to continue, the average household size in New Garden would decline to 2.58 during the 10-year build-out period. This figure was used to estimate the population increase that would come with the potential 10-year build-out.

This LUAR estimates that 442 new residential units will be built in the 10-year build-out period. This does not include the 201 new residential units that are approved or under review. Combining these would result in 643 new residential units by 2035. At an average household size of 2.58 persons, this implies 1,659 new residents by 2035. While this is about double the number projected by DVRPC, it is also important to note that, unlike the DVRPC estimate, this LUAR is not attempting to project the number of residents that will move out of the township in the 10-year period. Where DVRPC's estimate is attempting to project the net change in population, the LUAR only projects the number of incoming residents that would be implied by the potential development.

Table 7 - Ultimate Development Potential Summary by Zone

Zoning	Acreage	Constrained Land (Acres)	Developable Acres	Development Potential	
Enterprise	305.5	62.6	243.0	6,721,145	Square Feet
Mixed-Use Corridor	504.2	81.6	422.6	8,565,354	Square Feet
Village Center	104.8	31.7	73.1	2,068,978	Square Feet
Village Gateway	44.7	9.1	35.6	1,006,574	Square Feet
Non-Residential Total	959.2	185.0	774.2	18,362,051	Square Feet
Low Density Residential	0	0	0	0	Units
Medium Density Residential	67.1	6.4	60.8	211	Units
Residential Flex	832.9	58.1	774.8	1,104	Units
Mixed-Use Corridor	130.9	28.3	102.6	283	Units
Residential Total	1,031	92.8	938.2	1,598	Units

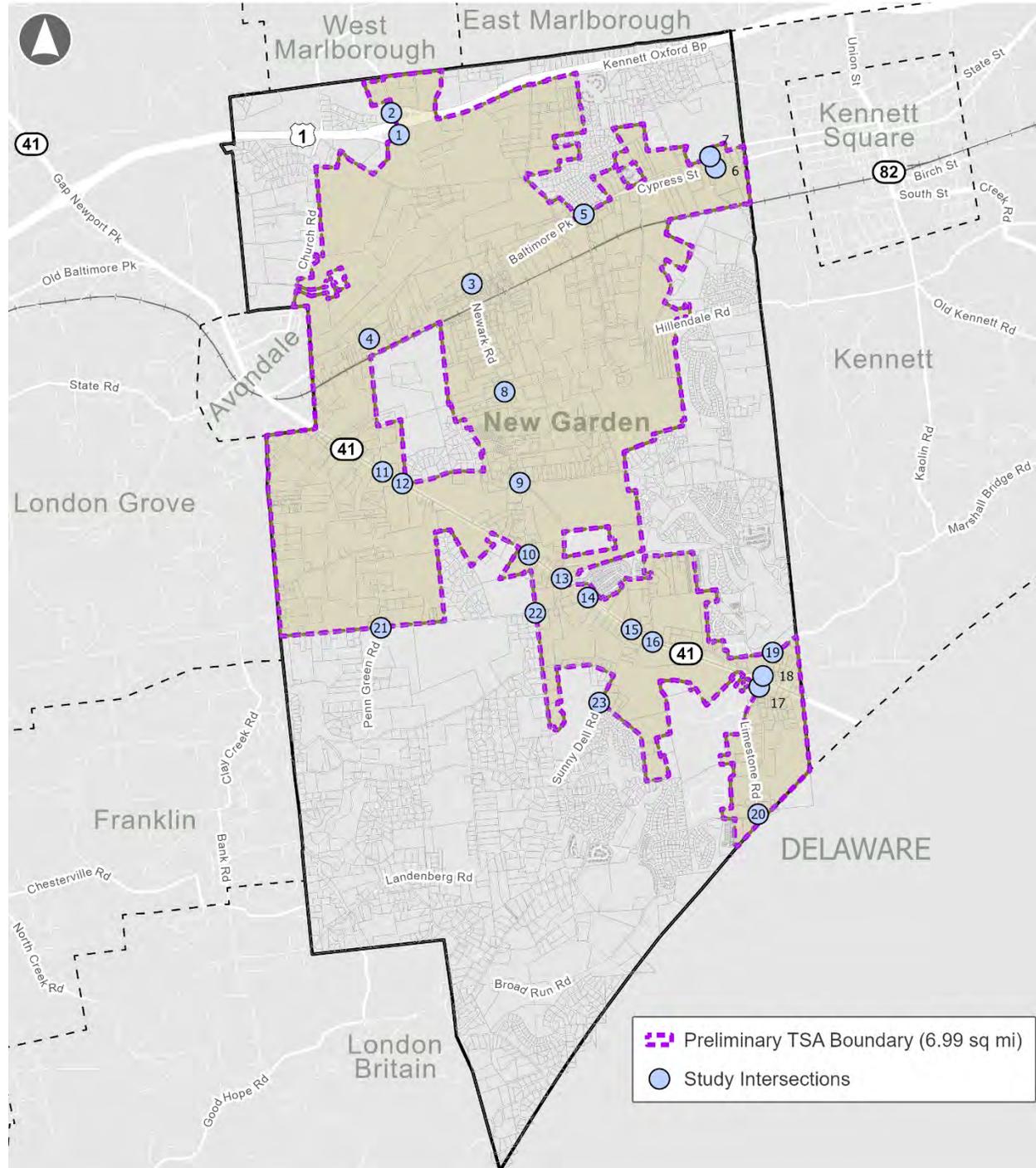
Table 8 - 10-Year Build-Out Potential by Zone

Zoning	Acreage	Constrained Land (Acres)	Developable Acres	Development Potential	
Enterprise	190.8	38.2	152.6	672,114	Square Feet
Mixed-Use Corridor	328.5	59.5	269.1	1,713,071	Square Feet
Village Center	104.7	31.7	73.1	310,347	Square Feet
Village Gateway	8.3	2.7	5.6	157,432	Square Feet
Non-Residential Total	632.4	132.1	500.3	2,852,964	Square Feet
Low Density Residential	0.0	0.0	0.0	-	Units
Medium Density Residential	0.0	0.0	0.0	-	Units
Residential Flex	217.2	20.1	197.1	159	Units
Mixed-Use Corridor	130.9	28.3	102.6	283	Units
Residential Total	348.1	48.4	299.7	442	Units

Map 1: Preliminary Transportation Service Area

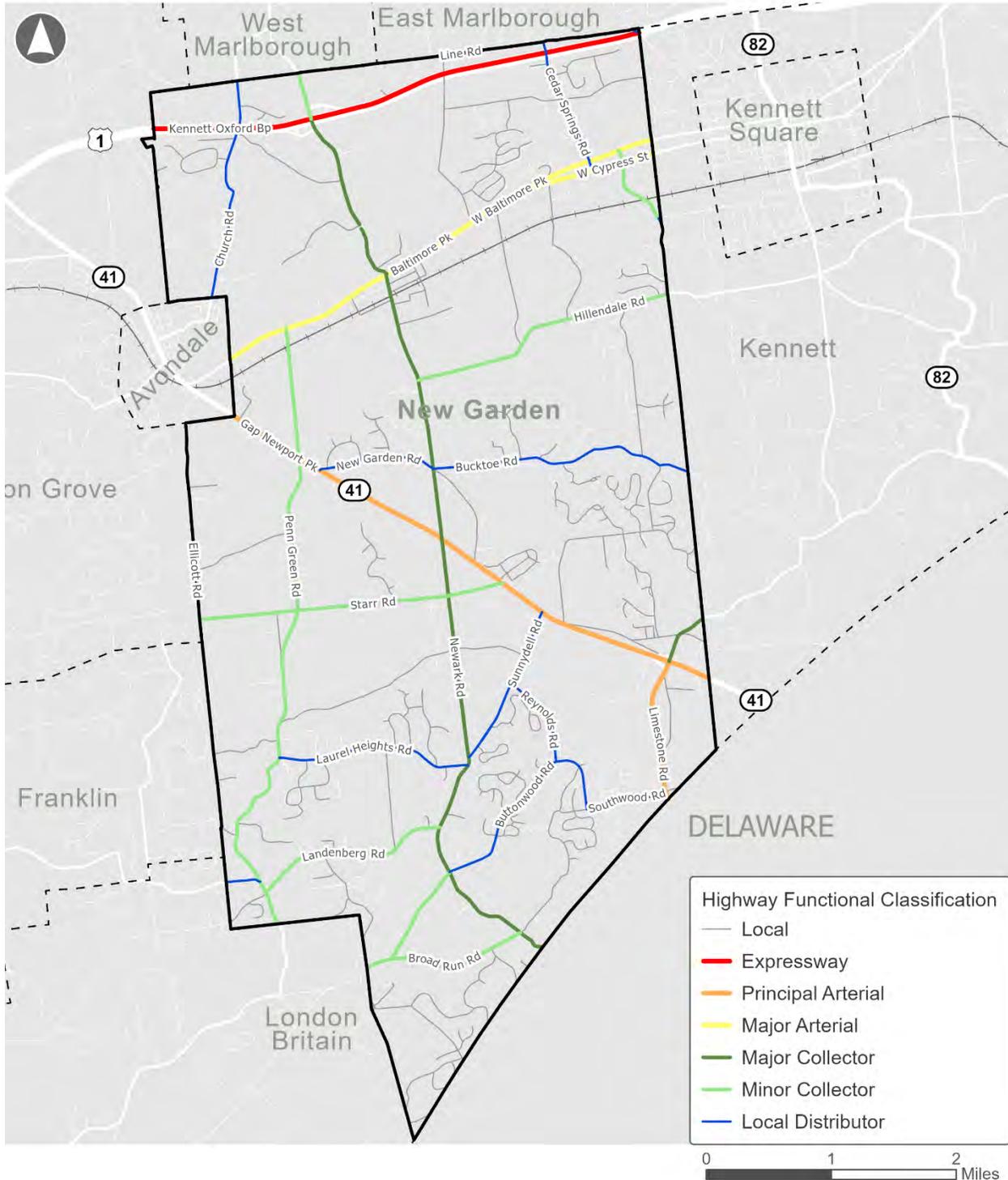
New Garden Township Act 209 Study

Preliminary Transportation Service Area (TSA)



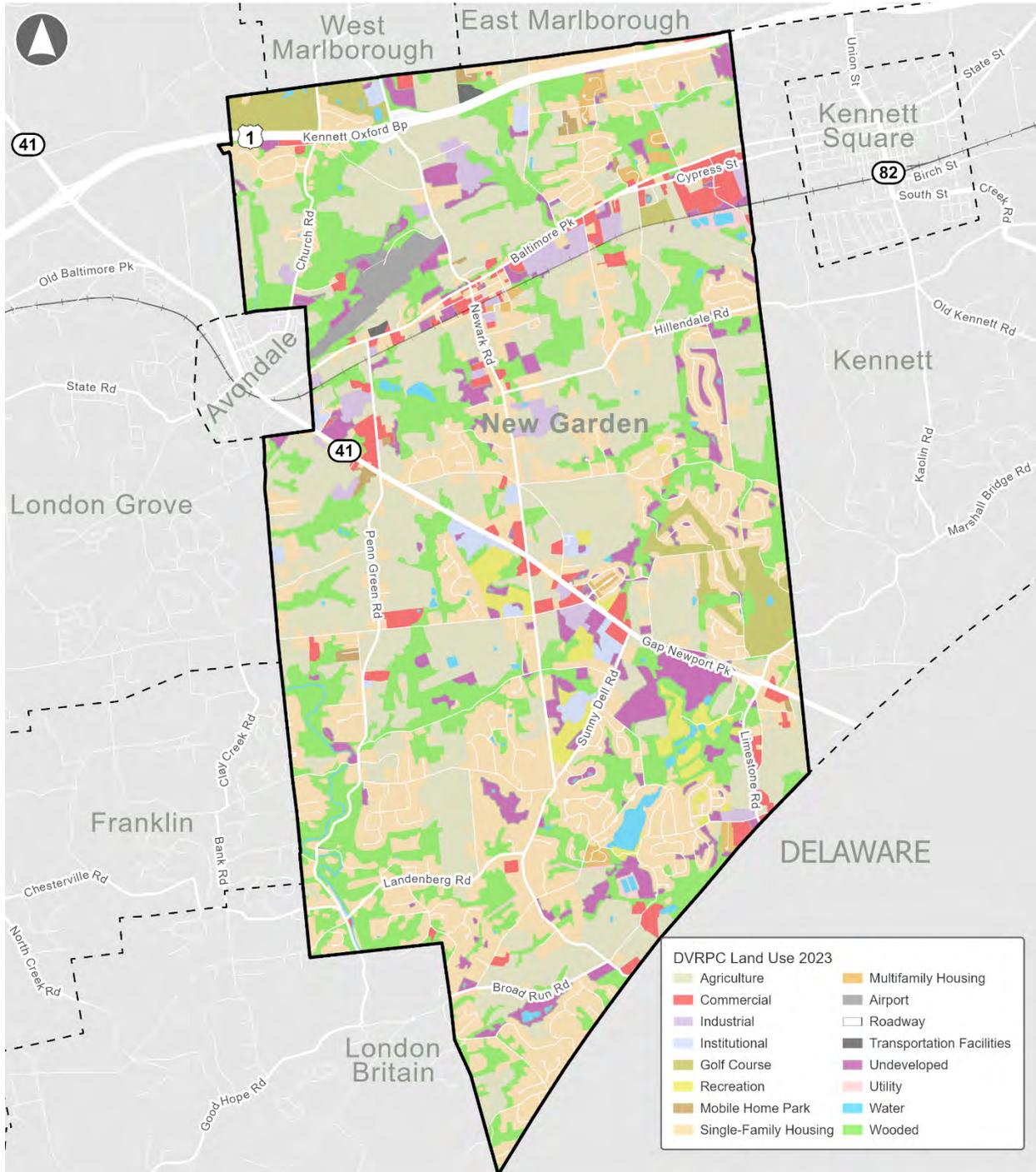
New Garden Township Act 209 Study

Highway Functional Classification



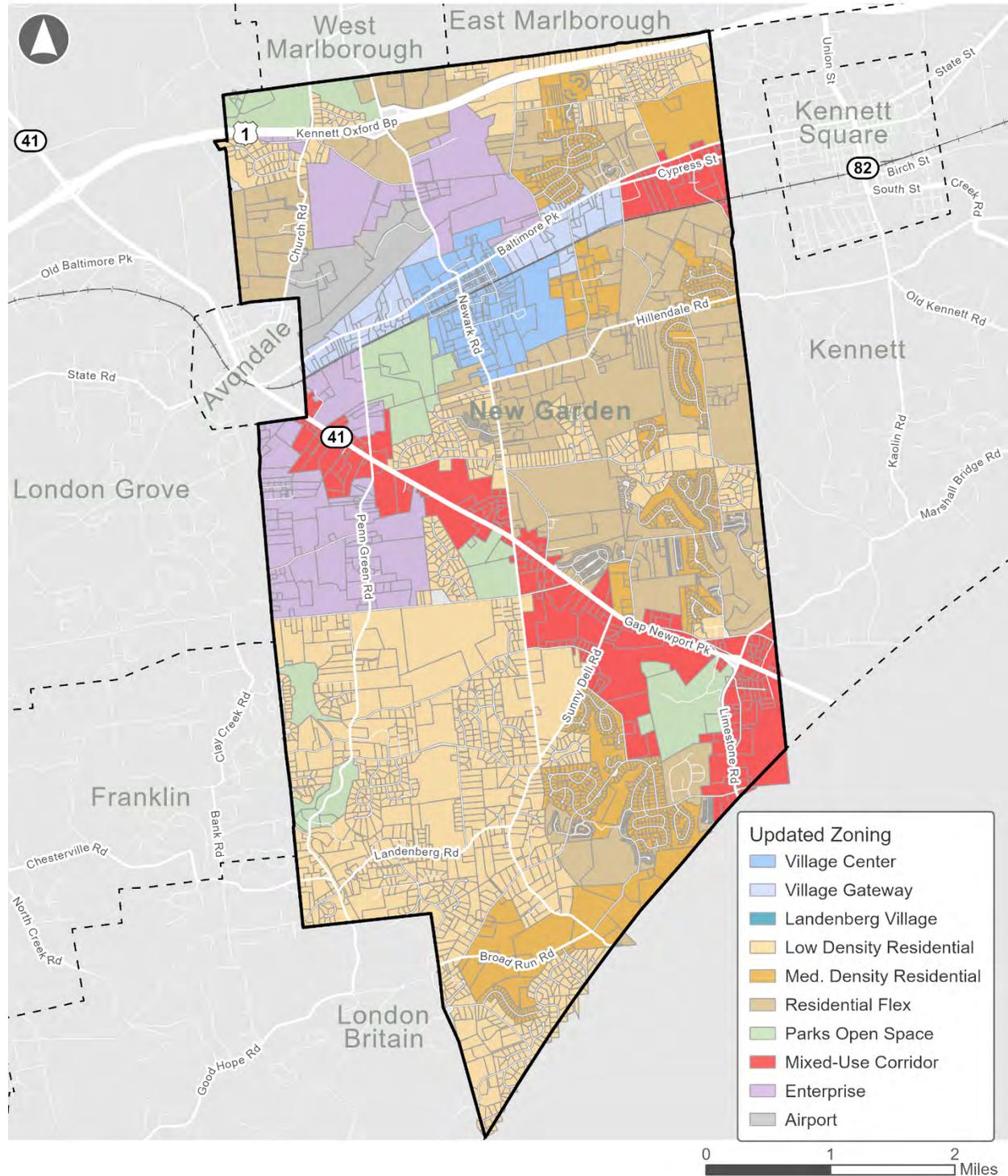
New Garden Township Act 209 Study

Existing Land Use (DVRPC - 2023)



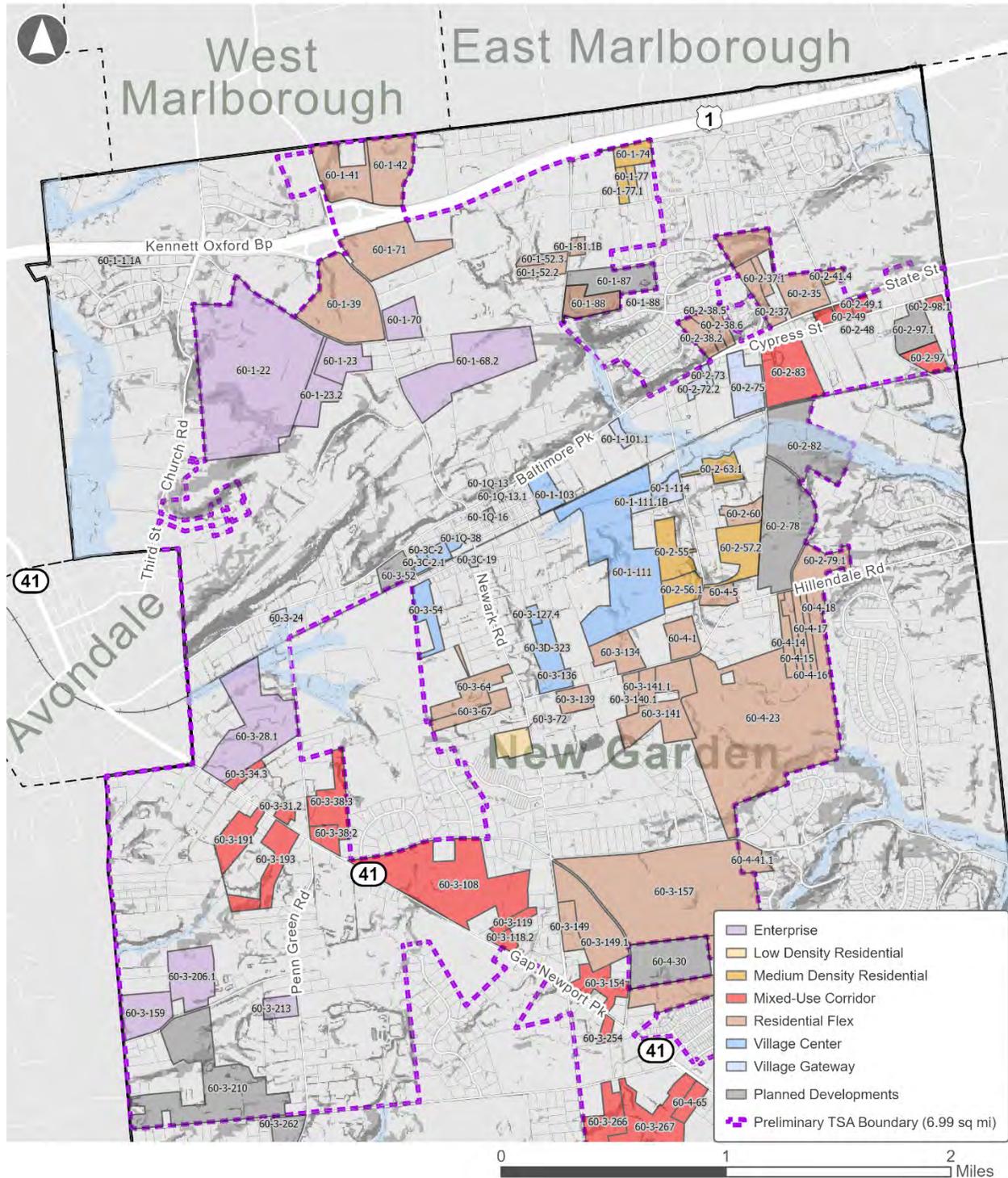
New Garden Township Act 209 Study

Updated Zoning



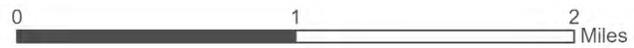
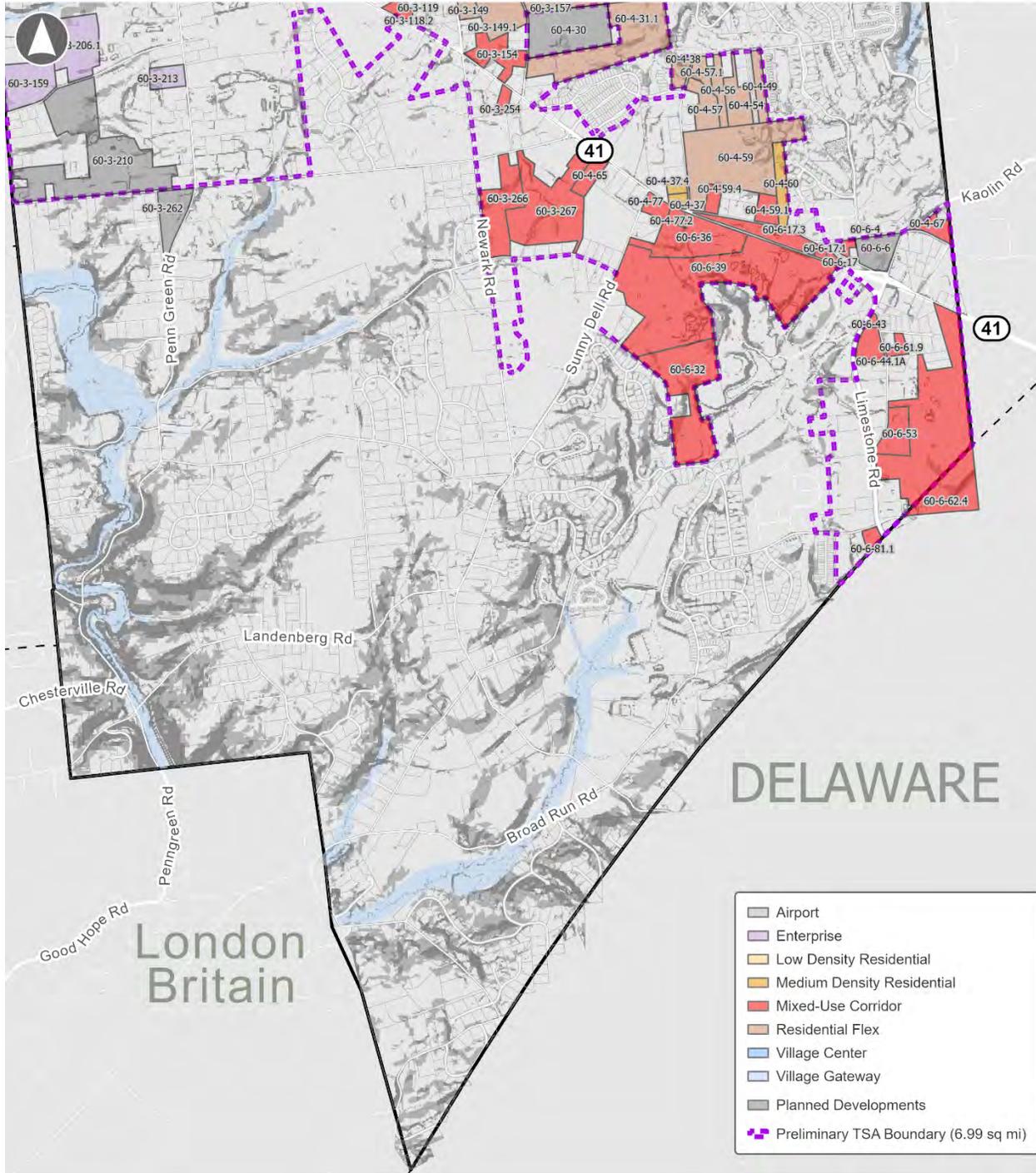
New Garden Township Act 209 Study

Potential Development Parcels - Ultimate Buildout (North)



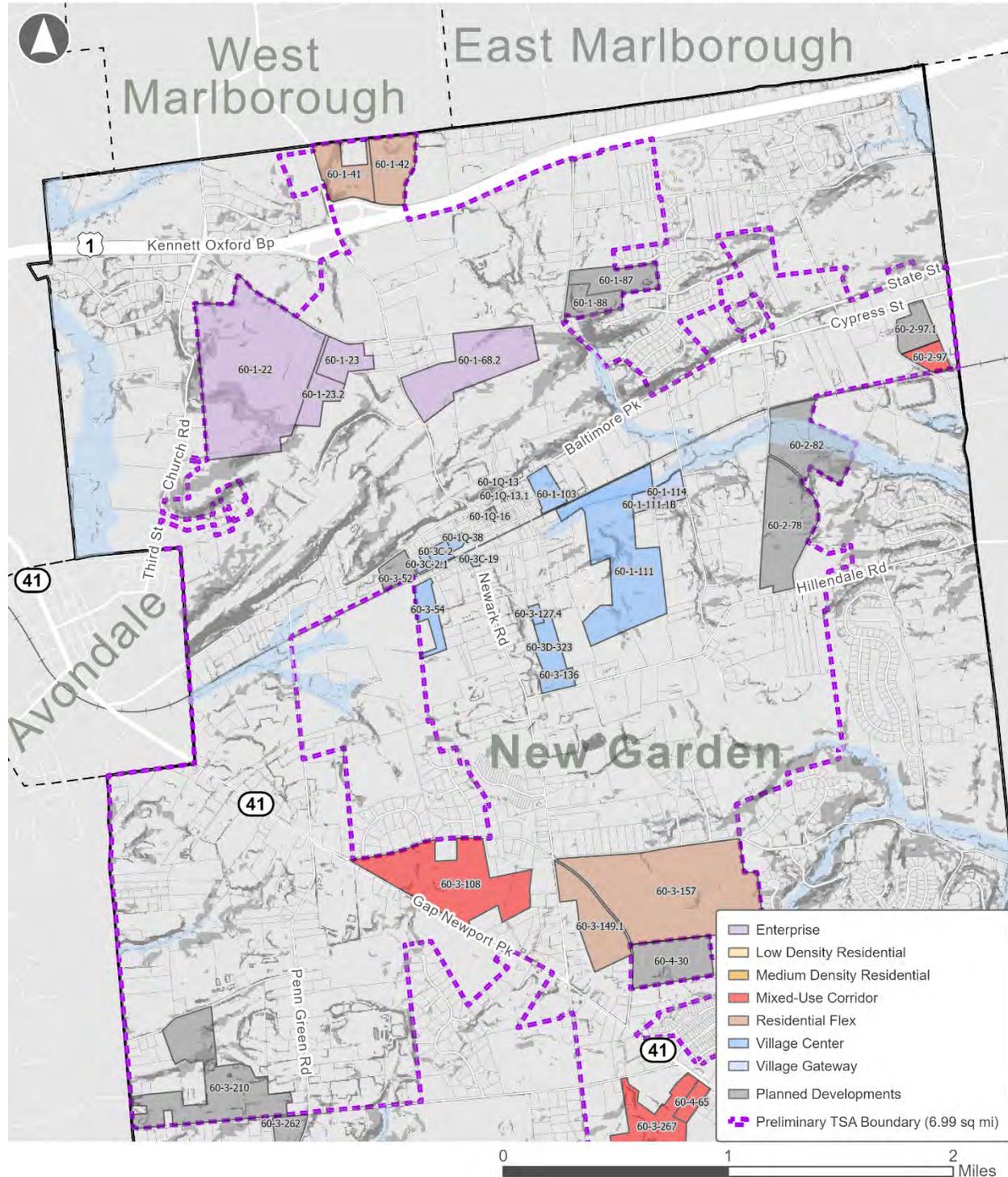
New Garden Township Act 209 Study

Potential Development Parcels - Ultimate Build-Out (South)



New Garden Township Act 209 Study

Potential Development Parcels - 10 Year Buildout (North)



New Garden Township Act 209 Study

Potential Development Parcels - 10-Year Buildout (South)

