9th Annual
LEHIGH VALLEY OUTLOOK + AWARDS
Tuesday, November 15th
planning for responsible management, preservation, growth, development + redevelopment
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David Jones
Dennis Klusaritz
Richard Molchany (alt.)
Joyce Moore
Christina V. Morgan
Owen O’Neil
David Petrik (alt.)
Kathy Rader
Stephen Repasch
Joshua Siegel
Matthew Tuerk

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Liesel Dreisbach
Andrew Elliott
Charles W. Elliott, Esq.
Dan Engle
John Gallagher
Darlene Heller, AICP (alt.)
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David Hopkins (Alt.), City of Easton
Jennifer Ruth, PennDOT District 5-0
David Alas, PennDOT Central
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Thomas Stoudt, Lehigh-Northampton Airport Authority
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embrace the power of many
change begins here.
Someone is sitting in the shade today because someone planted a tree a long time ago.

— Warren Buffett
Everyone is a Leader
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Greg Zebrowski
Petrucci 30-
second video here
Peter Polt
Executive Vice President
begin with fact-based optimism
Lehigh Valley Population Projections
2010 - 2050

In 2020 alone population increased by 11,000

By 2050 population will grow by nearly 100,000

Source: U.S. Census/Regional Economic Modeling Inc. (REMI)
390,000 jobs exist in the region today.

By 2050 that will grow to 460,000.

Lehigh Valley Employment Projections
2010 - 2050

Source: U.S. Census/Regional Economic Modeling Inc. (REMI)
Population Projections by Generation

2010 - 2050

Source: U.S. Census/Regional Economic Modeling Inc. (REMI)
Early 2023
Deep dive Population + Employment Projections
2022 plan activity expected to be highest since 2008

Q1 – Q3 Plan Activity

Reviews: 622
Acres: 5,314

Lehigh County
Reviews: 327
Acres: 1,872.5

Northampton County
Reviews: 300
Acres: 3,441.5

Source: Lehigh Valley Planning Commission
Q1-Q3 warehouse proposals - 50% more than we saw this time last year.

2022 non-residential square footage is 3 mil more than 2021 + 7 mil more than 2020.

Q1 – Q3 Development Report

NON-RESIDENTIAL

19,112,427 Total Square Feet

- Commercial: 1,286,482
- Retail: 125,121
- Public/Quasi-Public: 1,230,683
- Industrial (Warehouse)*: 16,256,616 (W: 15,728,126)
- Office: 198,046
- Recreational: 15,479

* Warehouse number is a subset of industrial total square footage. Source: Lehigh Valley Planning Commission
2023
Lehigh County Freight Land Assessment + Municipal Guidance
RESIDENTIAL

4,471 Total Units

Single-Family Detached 568
Townhouses 840
Apartments 2,705
Twins 82
Assisted-Living 234
Condos 42

Source: Lehigh Valley Planning Commission

Q1 – Q3 Development Report

Expect a 2nd record-breaking year in a row for housing development

Apartment proposals on pace to reach 3,600 new units by year end
# Housing Market Update

## Lehigh Valley Sales 2008-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>Median Sales</th>
<th>Units Sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$200,000</td>
<td>6,934</td>
</tr>
<tr>
<td>2009</td>
<td>$179,900</td>
<td>5,820</td>
</tr>
<tr>
<td>2010</td>
<td>$177,000</td>
<td>4,887</td>
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<tr>
<td>2011</td>
<td>$176,000</td>
<td>3,693</td>
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<tr>
<td>2012</td>
<td>$173,000</td>
<td>4,543</td>
</tr>
<tr>
<td>2013</td>
<td>$175,000</td>
<td>6,341</td>
</tr>
<tr>
<td>2014</td>
<td>$175,000</td>
<td>6,188</td>
</tr>
<tr>
<td>2015</td>
<td>$175,000</td>
<td>6,811</td>
</tr>
<tr>
<td>2016</td>
<td>$179,900</td>
<td>7,446</td>
</tr>
<tr>
<td>2017</td>
<td>$184,900</td>
<td>7,748</td>
</tr>
<tr>
<td>2018</td>
<td>$190,000</td>
<td>8,360</td>
</tr>
<tr>
<td>2019</td>
<td>$200,000</td>
<td>8,596</td>
</tr>
<tr>
<td>2020</td>
<td>$225,000</td>
<td>8,211</td>
</tr>
<tr>
<td>2021</td>
<td>$250,000</td>
<td>9,714</td>
</tr>
<tr>
<td>2022</td>
<td>$272,400</td>
<td>5,015</td>
</tr>
</tbody>
</table>

Sources: Lehigh Valley Planning Commission, Lehigh County and Northampton County Assessment Departments, 2022
Regional Housing Assessment

UNITS SOLD AND MEDIAN SALES PRICE
2008 – 2022 (July)

Source: Lehigh Valley Planning Commission, Lehigh County and Northampton County Assessment Departments
### Effect of Rising Interest Rates

<table>
<thead>
<tr>
<th></th>
<th>January 2021</th>
<th>November 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Price of Home</td>
<td>$272,000</td>
<td>$272,000</td>
</tr>
<tr>
<td>20% Down Payment</td>
<td>$54,400</td>
<td>$54,400</td>
</tr>
<tr>
<td>Average 30-Year Fixed</td>
<td>2.65%</td>
<td>7.30%</td>
</tr>
<tr>
<td>Mortgage Interest Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monthly Payment</td>
<td>$877</td>
<td>$1,492</td>
</tr>
</tbody>
</table>

A buyer at their borrowing limit they would need to **reduce** their purchase price to **$160,000**.
RENTAL OCCUPANCY AND MEDIAN GROSS RENT

2010 – 2021

Source: Lehigh Valley Planning Commission, Lehigh County and Northampton County Assessment Departments
Regional Housing Cost Burden

2010 – 2020

- 2010: 57% Cost-Burdened Homeowners, 43% Cost-Burdened Renters
- 2015: 53% Cost-Burdened Homeowners, 47% Cost-Burdened Renters
- 2020: 48% Cost-Burdened Homeowners, 52% Cost-Burdened Renters

Source: Lehigh Valley Planning Commission and U.S. Census Bureau 2010-2020
Regional Housing Cost Burden

76,881 households are cost-burdened

5.1 in 10 renter-households

2.2 in 10 owner-households

2.5 people average household size

192,202 people in a cost-burdened housing condition

28% of the Lehigh Valley’s population is in a cost-burden housing condition

Source: Lehigh Valley Planning Commission and U.S. Census Bureau 2010-2020
What Housing Is Needed?

- Shortage of 34,716 housing units for incomes of $100,000/year or more
- Stock of 51,606 housing units for incomes of 25,000-$99,999/year
- Shortage of 16,058 housing units for incomes of $24,999/year or less

Higher-income households are either forced to buy down or remain in lower-cost housing as they gain wealth, creating a lack of units in mid- and lower-price ranges.

Lower-income households are forced to spend more than they can afford because of limited housing in their price range.

Source: U.S. Census Bureau American Community Survey and Lehigh Valley Planning Commission

Shortages in several income brackets add pressure on the entire system, creating constraints everywhere.
2023 Housing Supply + Attainability Strategy
A radio show hosted by Greg Capogna, with Becky Bradley and Matt Assad

Every first Monday of the month at 6:30PM
Next episode airs on December 5th at 6:30PM
Allow events to change you

--- Bruce Mau
TRANSPORTATION IMPROVEMENT PROGRAM
2023-2026

Supporting Over 120 projects in the Lehigh Valley

Lehigh Valley Transportation Study

$485,576,421
2023-2026 TOTAL TIP INVESTMENT

$10,805,394 Traffic Management Technologies

$4,650,050 Roadway Expansion

$161,159,463 Reconstruction / Modernization / Automation

$3,360,000 Transit Expansion / Modernization

$9,696,792 Multi-Use Trails and Bicycle Facilities

$106,208 Pedestrian Facilities / Safe Routes to Schools

$133,140,152 Transit

$162,658,362 Bridge Replacement / Rehabilitation
Select 2023-2026 Transportation Investments

Bridge Replacement / Rehabilitation
- Hill to Hill Bridge - $21,171,500
- State Route 33 Bridges - $18,786,685

Multi-Use Trails and Bicycle Facilities
- Two Rivers Trail Gap 9A - $335,100
- Transportation Alternatives
  Set-Aside - $5,061,692

Transportation Management Technologies
- Freeway Service Patrol - $1,311,734
- Intelligent Transportation Systems - $4,188,250

Roadway Expansion
- MacArthur Road over Jordan Creek - $4,525,050
- Lehigh / Race Street Intersection - $125,000

Roadway Reconstruction, Modernization / Automation
- State Route 309 Center Valley Interchange - $23,437,725
- State Route 22 / State Route 191 Interchange - $9,099,850
- State Route 22 Resurfacing - $5,500,000

Transit Expansion
- LANTA Congestion and Air Quality Mitigation - $3,360,000

Pedestrian Facilities and Safe Routes to School
- Martin Luther King, Jr. Drive Improvements - $106,208

Transit - LANTA
- Operating Assistance - $81,356,052
- Heavy Duty Bus Purchase - $14,884,100
Riverside Drive
Multimodal Revitalization Corridor Project

$21.2 MILLION
US DOT RAISE Funding
40% of Total RAISE Project Cost

$34.4 MILLION
Committed Match
60% of Total RAISE Project Cost

$55.6 MILLION
Total Project Investment
Traffic Monitoring

106,772 VEHICLES DAILY

70,962 VEHICLES DAILY

92,937 PASSENGER VEHICLES
13,835 TRUCKS

49,240 PASSENGER VEHICLES
21,722 TRUCKS
Greenhouse Gas Emissions by Sector
9,860,260 Metric Tons of Carbon Dioxide Equivalent (MTCO₂e) Total

Regional Greenhouse Gas Inventory

Source: Lehigh Valley Planning Commission Analysis
Transportation Business As Usual
Projected CO₂e values

Source: Lehigh Valley Planning Commission Analysis
Industrial Business As Usual
Projected CO₂e values

Source: Lehigh Valley Planning Commission Analysis
Regional Greenhouse Gas Emissions

2019 GHG Emissions
9.8 million Metric tons CO$_2$e

2049 GHG Emissions
Over 10 million Metric tons CO$_2$e

Cumulative Increase
1.5%

Source: Lehigh Valley Planning Commission Analysis; Image: CBS Los Angeles
Designing what we need rather than replicating what exists
Steve Glickman  
Chair  
*Lehigh Valley Planning Commission*

Greg Zebrowski  
Immediate Past Chair  
*Lehigh Valley Planning Commission*
Congratulations to the

For their outstanding conservation work and a commitment to ensuring the representation of all members of the community.
Sherlyn Martinez

Donna Hanna
Community of Distinction Awards
Past Winners of Community of Distinction

City of Bethlehem
2014

Bushkill Township
2015

South Whitehall Township
2016

Catasauqua Borough
2017

Macungie Borough
2018

Plainfield Township
2019
Upper Saucon Township

Honoree
City of Easton

2022 Community of Distinction
Stand on someone’s shoulders and then reach down and bring the next person up