

Prepared by The Morris County Planning Board



2021

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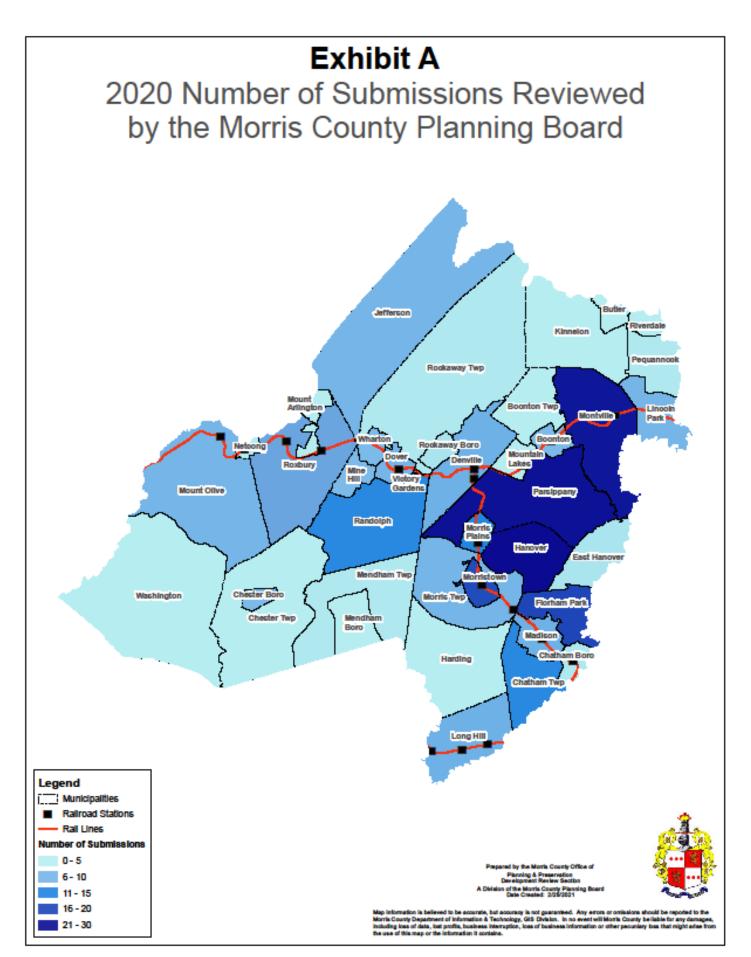
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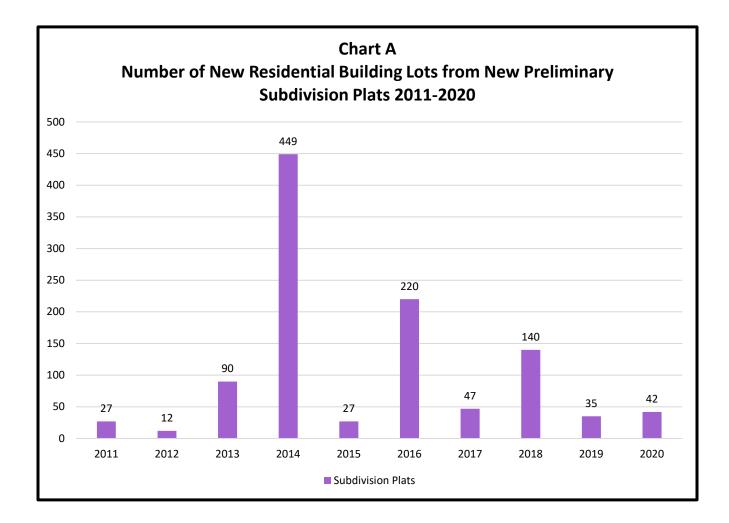
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Summary

- The amount and type of applications received is similar to the levels received in 2019. A total of 309 applications were received by the County Planning Board in 2020, which is slightly greater than 2019. Exhibit A depicts the number of applications received from each municipality. The Township of Hanover, Montville and Parsippany-Troy Hills had the highest number of submittals (28, 29 & 30 respectively) in the County.
- Multi-family residential developments continue to increase as municipalities try to fulfill their affordable housing obligations. The cumulative number of new proposed units (3,232) and number of applications (23) is the highest it has been in the past ten years.
- Commercial office development saw a marked increase due to one proposed redevelopment for a two building office complex (352,670 sf) with first floor retail (29,530 sf) in the Town of Morristown located within walking distance of the Morristown Train Station. We are starting to see a trend in proposed redevelopment of former Office Building sites to a mixed-use combination of residential/retail/office use. There was a substantial decline in overall square footage from 2019 to 2020.
- As has been discussed in past reports, with the exception of large legacy projects, single-family lots created by major subdivision are continuing to decline.
- Housing affordability continues to be an issue. In 2019, the median new single-family attached home sale price in Morris County was \$567,500, while the median home price for new single-family detached was \$753,500. This information was obtained from NJDCA data from home warranty companies. This data is normally not available until the third quarter of the preceding year.
- Applications totaling 3,232 multi-family units were reviewed in 2020. The vast majority of the proposed developments were luxury rentals that have projected rent levels higher than the median rent level for the County. The median rent for a two-bedroom apartment is \$1,740. Approximately 43% of renters in Morris County are paying 30% or more of their gross income for rent. As municipalities strive to meet their local affordable housing mandates, the County Planning Board has begun to see the expected increase in the amount of multi-family units submitted (1,411 units in 2019 to 3,232 units in 2020).

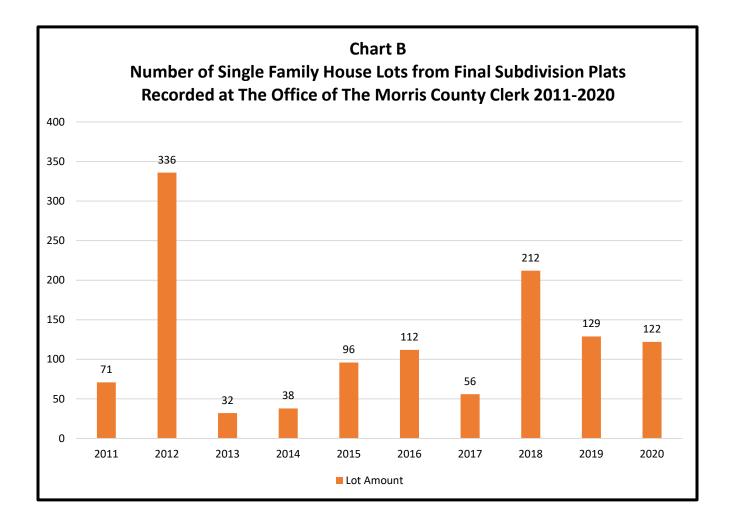




As shown in Chart A, there was a significant decrease in the number of new residential building lots proposed from major subdivisions from 2018 to 2019. This trend has carried over to 2020. The 42 lots proposed were generated from six projects, the largest of the major subdivisions, Larisons Corner in Chester Borough consisted of 21 lots. In 2018, The American project in the Borough of Morris Plains alone generated 96 lots, which is nearly two & half times the total number generated in 2020.

Due to the scarcity of available land, there will likely be few new large subdivisions proposed in Morris County on land that was not previously developed. However, redevelopment sites have the potential to generate moderate to large lot yields as demonstrated by prior projects such as The American and Del Webb (aka Green at Florham Park) cited in previous reports.

Minor subdivisions exempt from County review created 60 new lots, an increase of approximately 82% from 2019 exempt minor subdivisions. The amount of single-family house lots created from minor subdivisions and exempt minor subdivisions totaled 86 in 2020. This is the second straight year that lots created from minor subdivisions and exempt minor subdivisions have exceeded residential lots created from major subdivisions. With the exception of lots created from the larger legacy projects discussed in the 2015-2016 annual reports, it is expected that the amount of lots created by minor subdivision will continue to exceed the amount created by major subdivision.



As shown in Chart B, there was a slight decrease in the number of single-family house lots from major subdivisions recorded at the Office of the Morris County Clerk in 2020. Of the four projects recorded at the County Clerk's Office in 2020 the American Road Residential project totaled 106 lots. This is a redevelopment project of a former office use to a residential use and we anticipate additional developments of this type in the future but maybe not to this scale. As legacy projects are completed such as the American in Morris Plains (106 lots), the number of single-family house lots recorded from major subdivisions is anticipated to drop to less than 50 lots per year.

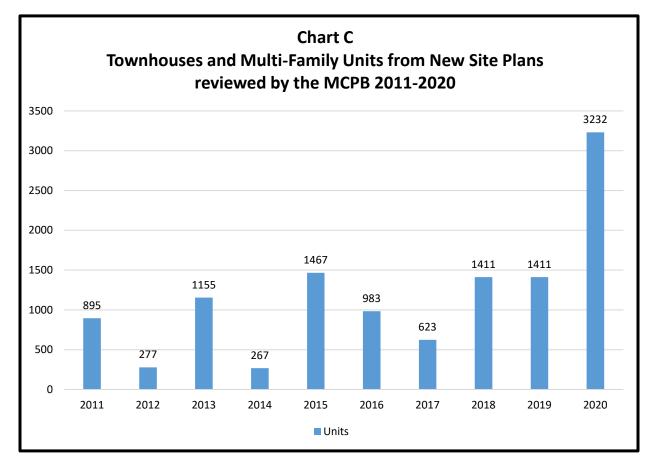


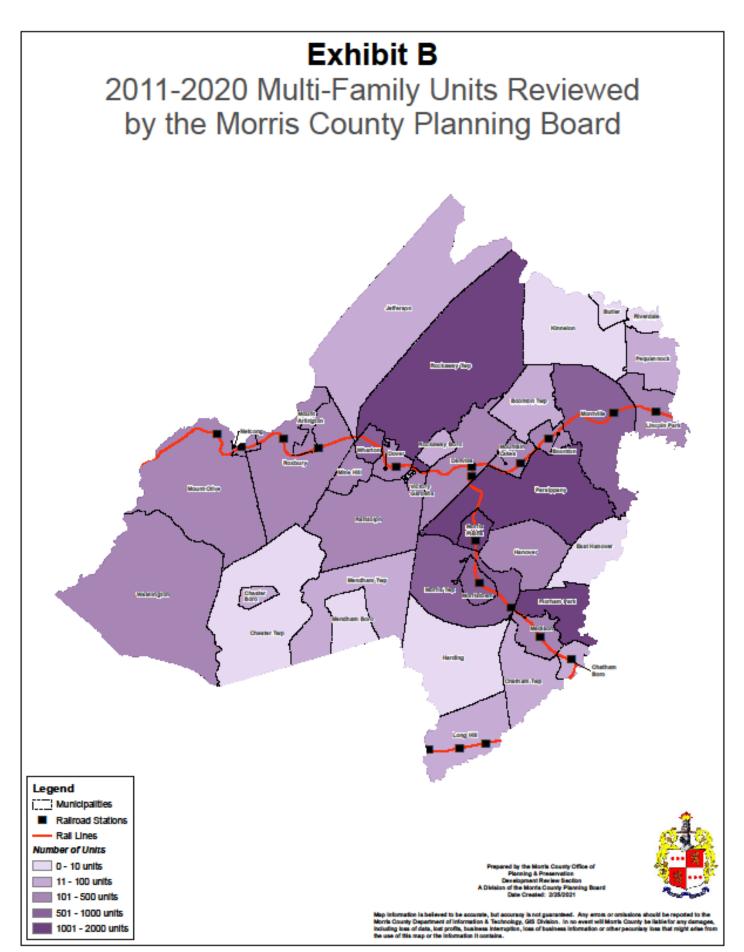
Chart C depicts ten years of historical data on the number of units contained in new multi-family site plan submittals. As shown, 2020 had the highest unit total in the past 10 years (3,232 units). Six developments (three in Montville and three in Parsippany) account for over half of the units reviewed with unit counts ranging from 70 to 625. The County Planning Board expects continued growth in this market as municipalities try to fulfill their affordable housing obligations and the market demand remains strong. The consumer preferences of the newly single demographic, millennial and baby boom generations are still driving the multi-family development market.

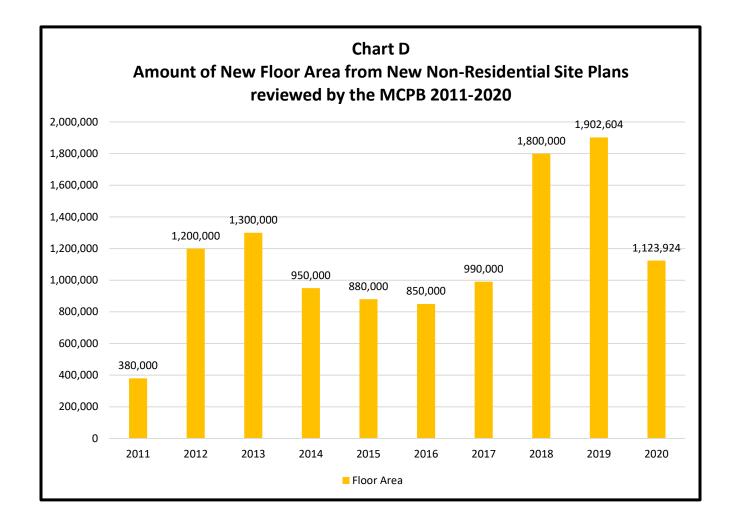
Exhibit B provides a breakdown of the amount of multi-family units, by municipality, reviewed by the Morris County Planning Board between 2011 and 2020. Applications totaling over 11,000 units were reviewed during that time. As is depicted, municipalities located along interstate highways and municipalities with access to commuter rail contained the highest amounts of proposed multi-family units. Parsippany had the highest unit total at 1,895.

In 2019, the median gross rent for a single bedroom apartment in Morris County was approximately \$1,314. The median gross rent for a two bedroom unit was approximately \$1,740.¹ Based on continued market demand, the Morris County Planning Board expects the upward trend in rent levels to continue.

The overwhelming majority of the new multi-family applications are still for "luxury" or high-end units. As stated in previous reports, while the development of multi-family housing once provided a lower cost alternative to single-family housing, the monthly rental rates of the luxury units is comparable to a monthly mortgage payment for a 3-bedroom detached single-family home. Morris County Department of Planning & Preservation staff predict that the "luxury" portion of the multi-family market will become over saturated if the present development rates continue.

¹ US Census Bureau, 2015 Census and 2019 American Community Survey 5-Year Estimates





Non-residential site plans submitted to the Morris County Planning Board can range from small building additions with a minimal amount of floor area to new office buildings, regional retail facilities, and industrial warehouses with several hundred thousand square feet of floor area. Industrial uses typically generate the largest buildings, especially those plans that include flex/warehouse facilities. This year saw a reversal in this trend with the largest in square footage being a mixed-use corporate office and retail project totaling 382,200 sf. Out of the 382,200 sf, 352,670 sf was office space. This accounts for over 31% of the total new square footage proposed. As shown in Table II (Section II) and Chart D, the Morris County Planning Board received 52 new non-residential site plans in 2020. This was a 24% decrease in number of applications from 2019. Table VII (Section II) provides a list of site plans of 50,000 square feet and greater of new floor area. There was a major decrease (41%) in the amount of proposed square footage from 2019 (1,902,604 sf) to 2020 (1,123,924 sf).

Table I 2020 Number of Plats Reviewed Morris County Planning Board

Municipality	Preliminary Subdivision	Final Subdivision	Minor Subdivision	Site Plan	Exempt Minor	Exempt Site Plan
	(New/Revised/Total)	(New/Revised/Total)	(New/Revised/Total)	(New/Revised/Total)		
Boonton	-	-	-	2/3/5	1/0/1	1/0/1
Boonton Twp.	-	0/1/1	-	1/0/1	1/0/1	1/0/1
Butler	-	-	-	-	-	1/0/1
Chatham	-	-	0/1/1	-	1/0/1	3/0/3
Chatham Twp.	-	-	1/3/4	1/4/5	-	3/0/3
Chester	1/1/2	1/1/2	-	3/0/3	-	1/0/1
Chester Twp.	-	-	-	0/4/4	-	-
Denville	-	-	-	-	-	6/0/6
Dover	-	-	-	3/0/3	2/0/2	1/0/1
East Hanover	-	-	-	0/2/2	-	2/0/2
Florham Park	0/1/1	1/2/3	1/1/2	6/3/9	-	1/0/1
Hanover	1/1/2	1/1/2	2/1/3	7/10/17	2/0/2	2/0/2
Harding	-	-	-	1/0/1	1/0/1	1/1/2
Jefferson	-	-	2/1/3	2/2/4	1/0/1	2/0/2
Kinnelon	-	-	-	-	-	-
Lincoln Park	-	-	1/0/1	3/0/3	1/0/1	1/0/1
Long Hill	-	-	1/0/1	1/2/3	1/0/1	4/0/4
Madison	-	-	0/2/2	1/0/1	1/0/1	4/0/4
Mendham	-	-	-	1/2/3	-	-
Mendham Twp.	1/0/1	-	-	-	-	-
Mine Hill	-	-	1/1/2	2/1/3	1/0/1	1/0/1
Montville	1/2/3	2/3/5	1/4/5	6/6/12	-	4/0/4
Morris Twp.	-	-	-	4/1/5	2/0/2	2/0/2
Morris Plains	0/1/1	0/1/1	-	1/4/5	3/0/3	3/0/3
Morristown	1/3/4	1/3/4	-	3/4/7	3/0/3	2/0/2
Mountain Lakes	1/0/1	-	-	1/0/1	-	-
Mt. Arlington	-	-	-	-	-	1/0/1
Mt. Olive	-	-	-	1/2/3	2/0/2	3/0/3
Netcong	-	-	-	0/1/1	-	1/0/1
Parsippany	2/2/4	2/2/4	1/0/1	9/5/14	-	7/0/7
Pequannock	-	-	1/1/2	2/0/2	-	-
Randolph	-	-	-	3/3/6	1/0/1	4/0/4
Riverdale	1/0/1	1/0/1	-	-	1/0/1	-
Rockaway	-	-	1/0/1	1/1/2	-	-
Rockaway Twp.	-	-	_	2/0/2	-	-
Roxbury	-	-	-	2/2/4	2/0/2	4/0/4
Victory Gardens	-	-	-	-	-	1/0/1
Washington	-	-	-	3/2/5	-	-
Wharton	-	-	-	3/3/6	-	1/0/1
Total	9/11/20	9/14/23	13/15/28	75/67/142	27/0/27	68/1/69

New Submissions = 106 Revised Submissions = 107 Exempt Submissions = 96 Total Submissions = 309 Minor subdivision plats and site plans not fronting on County Roads are reviewed and exempted if they do not affect County facilities.

Table II 2020 New Submissions Morris County Planning Board

Municipality	Subdivisions (1) Residential (Plats/Lots)	Subdivisions (1) Non-Residential (Plats/Lots)	Site Plans Residential (Plans/Units)	Site Plans (2) Non-Residential (Plans/Sq. Ft.)
Boonton	-	-	1/33	1/1,862
Boonton Twp.	-	-	-	1/0
Butler	-	-	-	-
Chatham	-	-	-	-
Chatham Twp.	-	-	-	1/0
Chester	1/21	-	1/20	2/163
Chester Twp.	-	-	-	-
Denville	-	-	-	-
Dover	-	-	1/4	2/0
East Hanover	-	-	-	-
Florham Park	-	-	3/505	3/15,405
Hanover	1/4	-	1/81	6/173,863
Harding	_	-	-	1/0
Jefferson	-	-	2/67	-
Kinnelon	-	-	-	-
Lincoln Park	-	-	1/175	2/0
Long Hill	-	-	-	1/0
Madison	-	-	-	1/3,002
Mendham	-	-	-	1/0
Mendham	1/6	-	-	-
Mine Hill	_	-	1/390	1/6,875
Montville	1/3	-	3/584	3/675
Morris Twp.	-	-	-	4/78,132
Morris Plains	-	-	-	1/0
Morristown	-	1/2	1/3	2/389,263
Mountain	-	1/2	-	1/35,605
Mt. Arlington	-	-	-	-
Mt. Olive	-	-	-	1/95,200
Netcong	-	-	-	-
Parsippany	1/5	1/4	3/1,153	6/193,283
Pequannock	_	-	-	2/4,206
Randolph	-	-	2/16	1/31,313
Riverdale	1/3	-	-	-
Rockaway	-	-	-	1/28,122
Rockaway	-	-	-	2/0
Roxbury	-	-	-	2/65,863
Victory	-	-	-	-
Washington	-	-	-	3/1,092
Wharton	-	-	3/201	-
Total	6/42	3/8	23/3,232	52/1,123,924

(1) Major subdivisions (Preliminary Plats)

(2) Includes some site plans for building additions or renovations where no new floor area is being added.

Table III 2020 Revised Submissions (1) Morris County Planning Board

Municipality	Subdivisions (2) Residential (Plats/Lots)	Subdivisions (2) Non-Residential (Plats/Lots)	Site Plans Residential (Plans/Units)	Site Plans (3) Non-Residential (Plans/Sq. Ft.)
Boonton	-	-	1/33	1/1,600
Boonton Twp.	-	-	-	-
Butler	-	-	-	-
Chatham	-	-	-	-
Chatham Twp.	-	-	2/77	-
Chester	1/2	-	-	-
Chester Twp.	-	-	1/10	1/0
Denville	-	-	-	-
Dover	-	-	-	-
East Hanover	-	-	-	2/5,869
Florham Park	1/2	-	1/150	2/2,983
Hanover	1/5	-	1/141	5/93,168
Harding	-	-	-	-
Jefferson	-	-	-	2/9,372
Kinnelon	-	-	-	-
Lincoln Park	-	-	-	-
Long Hill	-	-	1/30	1/0
Madison	-	-	-	-
Mendham	-	-	-	2/911
Mendham Twp.	-	-	-	-
Mine Hill	-	-	1/50	-
Montville	1/3	-	2/460	1/0
Morris Twp.	-	-	-	1/55,635
Morris Plains	1/8	-	-	3/674,030
Morristown	-	1/2	1/3	1/382,200
Mountain Lakes	-	-	-	-
Mt. Arlington	-	_	-	-
Mt. Olive	-	-	-	2/22,685
Netcong	-	-	1/80	-
Parsippany	1/5	-	2/712	2/29,903
Pequannock	-	-	-	-
Randolph	-	-	2/100	1/4,353
Riverdale	-	-	-	-
Rockaway	-	-	-	1/1,054
Rockaway Twp.	-	-	-	-
Roxbury	-	-	-	2/0
Victory Gardens	-	-	-	-
Washington	-	-	1/2	1/10,021
Wharton	-	-	2/141	1/2,247
Total	6/25	1/2	19/1,989	32/1,296,031

1) Some revised submissions were received more than one time and are only counted once in this table.

2) Major subdivisions (Preliminary Plats)

3) Includes some site plans for building additions or renovations where no new floor area is being added.

Table IV

2016-2020 Number of Single-Family House Lots from Major Subdivisions Recorded at the Office of the Morris County Clerk

Municipality	2016	2017	2018	2019	2020	5 Year Total
Boonton	-	-	-	-	-	-
Boonton Twp.	-	-	-	-	-	-
Butler	-	-	-	-	-	-
Chatham	-	-	-	-	-	-
Chatham Twp.	-	-	-	-	-	-
Chester	-	-	2	-	-	2
Chester Twp.	-	-	-	-	-	-
Denville	5	-	-	-	-	5
Dover	4	-	-	-	-	4
East Hanover	-	-	6	-	-	6
Florham Park	-	-	114	110	-	224
Hanover	4	-	-	-	-	4
Harding	-	-	-	-	-	-
Jefferson	4	-	-	-	-	4
Kinnelon	-	-	-	-	-	-
Lincoln Park	-	-	-	-	-	-
Long Hill	-	-	-	-	-	-
Madison	-	9	-	-	-	9
Mendham	-	-	3	-	-	3
Mendham Twp.	-	-	3	-	5	8
Mine Hill	-	-	4	-	-	4
Montville	3	15	-	7	8	33
Morris Twp.	-	-	3	4	-	7
Morris Plains	-	-	-	-	106	106
Morristown	-	-	-	-	-	-
Mountain Lakes	-	-	-	-	-	-
Mt. Arlington	-	-	-	-	-	-
Mt. Olive	77	-	77	-	-	154
Netcong	-	-	-	8	-	8
Parsippany	-	32	-	-	-	32
Pequannock	-	-	-	-	-	-
Randolph	-	-	-	-	-	-
Riverdale	-	-	-	-	3	3
Rockaway	-	-	-	-	-	-
Rockaway Twp.	10	-	-	-	-	10
Roxbury	5	-	-	-	-	5
Victory Gardens	-	-	-	-	-	-
Washington	-	-	-	-	-	-
Wharton	-	-	-	-	-	-
Total	112	56	212	129	122	631

Table V2020 Preliminary Single-Family Residential Subdivision PlatsReviewed by the Morris County Planning Board

Municipality	Development Name	Location	Total Lots
Chester	26 North Road	North Road	2 (R)
Chester	Larisons Corner	Mill Ridge Lane	21 (N)
Hanover	Irene Estates Whippany Road		5 (R)
Mendham Twp.	Forrest View Estates	Mountainside Road	6 (N)
Riverdale	Orsillo Subdivision	Highland Avenue	3 (N)

(N) new sub.(R) revised sub.

Table VI

2020 Proposed Townhouse & Multi-Family Site Plans of 20 Units or More Reviewed by the Morris County Planning Board

Municipality	Development Name	Location	Number of Units
Boonton	Barrister Court at Boonton	Powerville Road	33 (N)
Chatham Twp.	Arbor Green at Chatham	Southern Boulevard	24 (R)
Chatham Twp.	Dixiedale Residential	River Road	53 (R)
Chester	Larisons Corner	Mill Ridge Lane	20 (N)
Florham Park	LCS Development	Park Avenue	230 (N)
Florham Park	Sisters of Charity	Park Avenue	150 (N)
Hanover	River Park Building 1	Eden Lane	81 (N)
Hanover	26 Parsippany Road	Parsippany Road	141 (R)
Jefferson	Fifteen South Realty	Route 15	40 (N)
Jefferson	Route 15 Properties	Route 15	27 (N)
Lincoln Park	115 Main Street	Route 202	175 (N)
Long Hill	44 Plainfield Road	Plainfield Road	30 (N)
Mine Hill	Aine Hill KRE Mine Hill Canfield A		390 (N)
Mine Hill	ne Hill 106 Hurd Street Hurd Stree		50 (R)
Montville	tville Avalon Bay Montville Route 46		349 (N)
Montville	lle Juve Group Route 202		70 (N)
Montville	Modera Montville	ntville Changebridge Road	
Montville	Monarch Communities	Monarch Communities Changebridge Road	
Morris Plains	M&M Morris Plains	Tabor Road	434 (R)
Netcong	Crown Walk	Route 46	80 (R)
Parsippany	169 Johnson Road	Johnson Road	87 (N)
Parsippany	Parq Parsippany	Parsippany Road	625 (N)
Parsippany	The District at 15	Route 10	441 (N)
Randolph	Gateways at Randolph Center Grove Road		84 (R)
Wharton	Irondale Commons	Kossuth Street	60 (N)
Wharton	170 North Main Street	North Main Street	75 (N)
Wharton	10 North Main Street	North Main Street	66 (N)

(N) new sub.(R) revised sub.

Table VII

2020 Commercial, Industrial and Office Site Plans with 50,000 Sq. Ft. or More of New Floor Area Reviewed by the Morris County Planning Board

Municipality	Development Name	Location	Land Use	New Sq. Ft.
Hanover	224 Ridgedale Self-	Ridgedale Ave.	С	106,222 (N)
Morris Twp.	Ph. II Hockey Rink	Mendham Road	INST	55,635 (R)
Morris Plains	M&M Morris Plains	Tabor Road	С	122,150 (R)
Morris Plains	Morris Plains Warehouse/Industrial		W/I	551,880 (R)
Morristown	M Station	Morris Street	0	382,200 (N)
Mount Olive	Budd Lake Self-Stor.	Route 46	С	95,200 (N)
Parsippany	The District at 15	Route 10	C/O	140,000 (N)
Parsippany	Parq Parsippany	Parsippany Road	0	156,836 (N)

(N) new sub.(R) revised sub.