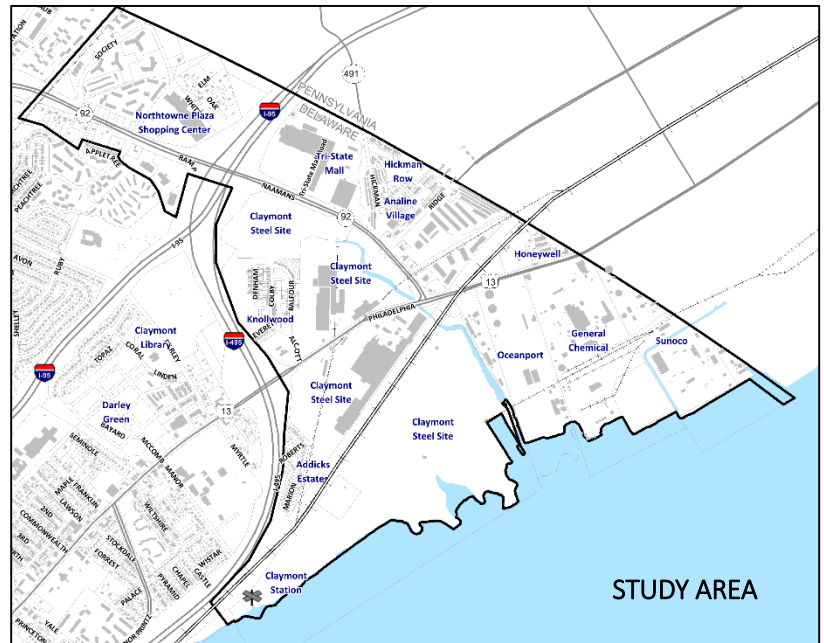


# North Claymont Area Master Plan (NCAMP): Highlights from the Task 1 Report

**Task 1: Identify Issues, Opportunities and Constraints** included analysis and mapping of existing conditions about:

- Land use including existing zoning and land use, currently planned land use, and land use policies.
- Economic development analysis including real market estate and freight.
- Demographics including current and forecasted population, employment and households.
- Transportation including roads, sidewalks, bicycle, bus, rail.
- Environmental features including parks, wetlands, brownfields, floodplain, sea-level rise.



**LAND USE.** The study area is dominated by industrial uses (429 acres), with open space (262 acres), residential (203 acres) and commercial (108 acres) uses. Industrially zoned land currently accounts for 801 acres, and 242 acres are zoned residential. State policy, Strategies for State Policies and Spending Map, designates the area as a location where Delaware will support growth and economic development activities. New Castle County’s Comprehensive Plan shows the area continuing to have a mix of industrial, commercial and residential land uses. The “First State Crossing” concept plan lays out a vision for future use of the 420 acre Claymont Steel site, subject to County approvals, state permitting and market conditions.

**ECONOMIC DEVELOPMENT.** Task 1 included development of a real estate and economic assessment analysis (see attached summary) and review of future industrial opportunities made possible by oil and gas development in the Marcellus Shale. The 2013 Delmarva Chemicals Supply Chain Study found that petroleum/chemicals industry in Marcus Hook, PA, directly impacts chemicals and transportation industries in Greater Wilmington. Transportation priorities were identified to support this economic growth, including rail and highway congestion alleviation, Delaware Bay dredging, secondary rail service to southern Delmarva, and coordination with DVRPC (Philadelphia’s regional planning organization).

**POPULATION AND EMPLOYMENT.** According to the 2015 WILMAPCO data, 4,625 people live and 2,682 work in, or immediately adjacent to, the study area. 2040 forecasts based on current trends show a slight anticipated decrease in both population and jobs in the area. This analysis is revisited annually to account for changing conditions.

**TRANSPORTATION.** The area is well served by road, bus and rail transportation but has limited connections for bicycling and walking. DART bus routes are 1, 21 and 61, with Route 1 the busiest in Delaware. SEPTA commuter rail and bus route 113 also serve the area. Bus routes intersect at the Tri-State Mall, which functions like a bus hub for connecting trips. Traffic counts show roads and intersections have sufficient capacity to accommodate the amount of traffic; these counts were conducted prior to recent development along Naamans Road. In 2014, there were 108 crashes in the area, including 12 resulting in injuries and one involving a pedestrian. The East Coast Greenway is a planned long-distance, bicycle and pedestrian route through the area. A separate Claymont Train Station study is developing plans for a relocated station.

**ENVIRONMENTAL AND CULTURAL RESOURCES.** Assets include two National Historic Sites, Hickman Row and the Robinson House, and several neighborhood parks. The Claymont Library, Woodshaven Kruse Park, and Brandywine Little League are just outside the study area but lack good pedestrian connections from within the study area. Environmental constraints are present throughout much of the area, including wetlands, floodplains and forested lands. Most notably, the land east of U.S. 13 is protected by Delaware’s Coastal Zone Act, which restricts certain types of industrial uses.

# North Claymont Area Master Plan (NCAMP): Highlights from the Market Assessment

---

The NCAMP Market Assessment, completed January 2016, examined industrial, office, residential, and retail for existing conditions, trends, and future market dynamics. The report was completed by W-ZHA for WILMAPCO.

## STUDY AREA CHARACTERISTICS

The NCAMP area has excellent access, with I-95 and I-495, Amtrak's Northeast Corridor, and the Philadelphia International Airport within a 15-minute drive. Industrial properties are accessible via ship and freight rail. There is a mix of land uses within the Study Area. Significant changes, underway and planned, will impact the Study Area's position in the marketplace:

- **The Redevelopment of the Claymont Steel Site:** Commercial Development Corporation (CDC) bought the 420-acre site in order to prepare it for redevelopment, and prepared a "First State Crossing" concept plan. The most notable land use in the concept plan is a Port on the Delaware River. To develop the Port or any commercial or industrial use south of Philadelphia Pike will require a Coastal Zone Permit. The Port of Wilmington's operator, Diamond State Port Corporation, is evaluating a number of sites along the Delaware River for Port expansion and this site is one of them.
- **A Relocated Claymont Rail Station:** DART First State/Delaware Transit Corporation and CDC are in discussions related to relocating the Claymont Rail Station to the Claymont Steel site. A new location may provide better access, more parking, a modernized station facility, and an opportunity for transit-oriented development, which offers an integrated mixture of housing, office, retail, and/or other amenities within walking distance of quality public transit. There are currently three locations being studied.
- **Sunoco Logistics Investments:** The Sunoco Logistics complex is partially in the Study Area. Decommissioned as an oil refinery in 2011, the complex has been re-positioned as a storage, processing, and distribution terminal for natural gas liquids. Sunoco plans to make it the largest natural gas liquids complex on the East Coast by year-end 2016. Sunoco's economic impact analysis concludes that the pipeline projects will potentially allow for new and expanded manufacturing opportunities along the East Coast, and notes that most of the beneficial economic and employment impacts will be realized in southeastern Pennsylvania. As an immediate neighbor, it can be expected that northern Delaware, including the Study Area, will also benefit from Sunoco's investments.
- **Tri-State Mall:** Tri-State Mall is currently 40% occupied. Tri-State Mall's ability to re-position itself has been hampered by K-Mart's lease, which has been in force since its closure in 2014, and the presence of Claymont Steel. In August of 2015, the K-Mart lease expired. This event, coupled with the purchase and demolition of Claymont Steel, removes major impediments to the Mall's redevelopment and/or revitalization.

## DEVELOPMENT POTENTIAL

- **Industrial:** The market has the potential to support 200,000 to 400,000 square feet of warehouse and distribution space in the Study Area, with the higher end of the range only realistic if a container port is developed. The market has the potential to support 120,000 to 180,000 square feet of flex space. With the growth of Sunoco, there will likely be interest from manufacturing companies over the next decade.
- **Office:** With a relocated rail station and a transit-oriented environment, the study area can support 50,000 to 100,000 square feet of office space over the next 10 years.
- **Residential:** Allowing for Darley Green to build out, the market has the potential to support 380-580 multi-family and 60-210 for sale dwelling units over the next 10 years.
- **Retail Market:** Naamans Road near the I-95 interchange can support between 300,000 and 500,000 square feet of new retail and eat/drink space.
- **Transit-Oriented Development:** Optimally, transit oriented development would be on Philadelphia Pike, adjacent to a relocated train station, to complement the commercial district of Claymont. This could include approximately 3,000-7,000 square feet of retail space.