



**WORK SESSION
AGENDA
CITY OF CREVE COEUR
PLANNING AND ZONING COMMISSION
300 NORTH NEW BALLAS RD
SEPTEMBER 29, 2025
6:00 PM**

CALL TO ORDER

ROLL CALL

Ms. Julie LaBonte (Chair)
Mr. Thomas Buelter
Ms. Rhonda O'Brien
Mr. Larry Potashnick
Ms. Marjorie Richter
Mr. Stephan Tomlinson
Mr. AJ Wang

Mr. Carl Lumley, City Attorney
Mr. Jason Jaggi, AICP, Director of Community Development
Ms. Bethany L. Moore, AICP, City Planner
Ms. Claralyn Bollinger, Recording Secretary, Administrative Services Supervisor

DISCUSSION ITEMS

- 1. Bayer East Campus Comprehensive Plan Update**

ADJOURNMENT

Pursuant to Section 610.022 RSMo., the Planning and Zoning Commission could, at any time during the meeting, vote to close the public meeting and move to closed session to discuss matters relating to litigation, legal actions and/or communications from the City Attorney as provided under Section 610.021(1) RSMo. and/or personnel matters under Section 610.021(13) RSMo. And/or employee matters under Section 610.021(3) RSMo. and/or real estate matters under Section 610.021(2) or other matters as permitted by Chapter 610.

Posted by: _____
Date/Time posted: _____



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If you need special accommodations to attend a meeting, services may be arranged by contacting the Office of the City Administrator in advance.



city of **CREVE COEUR**

300 North New Ballas Road • Creve Coeur, Missouri 63141
(314) 432-6000 • Fax (314) 872-2539 • Relay MO 1-800-735-2966
www.creve-coeur.org

MEMO TO PLANNING AND ZONING COMMISSION

Meeting Date: September 29, 2025

Subject: **Bayer East Campus Comprehensive Plan Work Session
Draft Plan Recommendations Review**

Memo Prepared by: Jason W. Jaggi, AICP, Director of Community Development

Attachments: **Bayer East Campus Comp Plan Update Draft Recommendations**
August 18, 2025 PGAV Presentation to P&Z (Market Study Findings)
June 18, 2025 Open House PGAV Presentation
Summary of Comments Received—June Open House
Boards and Handouts Comments—June Open House
PGAV Comprehensive Plan Update Scope of Services

The City's planning consultant, PGAV Planners, will review the draft plan recommendations for the Commission's review and input prior to these being presented at the final open house, scheduled for Wednesday, October 29th, 6-8pm. The consultant will recap the other components of the plan which have been completed and will review next steps to complete the process.

Attached to this memo for the Commission review prior to the meeting are the draft recommendations, the market study presentation from August 18th, and materials from the June 18 open house. Also included is the Scope of Services with PGAV Planners for this planning effort.

Draft Recommendations

Open Space & the Environment

Transportation & Connectivity

Future Land Use

Financial Incentives

Open Space & the Environment

Objectives:

- Incorporate the existing topography, wooded areas, and the natural habitat into new development.
- Prioritize open space in a way that allows for development while also preserving the existing tree canopy and maintaining a concentration of forested area in the southern and western portions of the site.
- Ensure a suitable buffer is provided between this site and the residential neighborhoods to the south.

Recommendations:

- Avoid extensive tree removal. Prioritize the preservation of connected forested areas, utilizing the existing roadways on the southern portion of the site as a natural boundary and buffer.
- Require a tree inventory and wildlife assessment as part of the development review process.
- Retain existing, mature trees on Warson Road that provide shade for pedestrians and a pleasant aesthetic for drivers and pedestrians.
- Encourage the removal of invasive vegetation throughout the site.
- Retain or re-establish the tallgrass prairie component on the southern end of the site to support bio-diversity.
- All site components should be designed such that the proposed conditions will not increase the volume or speed of stormwater runoff to adjacent property and that all new development on the site has no adverse effect.

Transportation & Connectivity

Objectives:

- Preserve existing site access to the surrounding roadway network while establishing new streets within the site that appropriately connect the various land use components, including the remaining Bayer corporate headquarters.
- Encourage pedestrian access throughout the site and connections to adjacent areas.

Recommendations:

- Ensure roadway access to the Tealwood Subdivision is provided. This could be in the form of a new roadway through the Bayer site that connects to North Warson Road or a reconfiguration of this road to provide an equivalent means of access. Establish a long-term maintenance plan for this connection working with the Tealwood subdivision.
- Require a traffic study for any future development on the site to understand the current traffic generation and future traffic demands based on proposed uses.
- Ensure there is a long-term ownership and maintenance plan for bridge over Lindbergh to provide necessary access to Olia Village, Bayer campus and development in the area.
- Maintain the pedestrian connection at Bayer Drive to Stacy Park and facilitate connections to the planned 39 North Greenway.
- Include walking trails within the forested areas and allow for public use.
- Consider the long-term potential of new pedestrian and bike connectivity between the east and west sides of Lindbergh connecting the Bayer campus with the Olia Village development

Future Land Use

Objectives:

- Allow a variety of new uses on the site that are compatible with the continued presence of the Bayer Crop Science headquarters operations but do not compete with the Olia Village development
- Consider reuse of existing research facilities by other users while remaining open to alternate land uses based on market demand
- Locate new uses on the site in the appropriate locations that are compatible with adjacent uses, particularly single-family residential uses.

Future Land Use

Recommendations:

- Appropriate uses on the site include, retail, recreational, commercial, various forms of housing, and offices, research and development facilities, and hotel with conference center.
- Prioritize commercial and service retail on Olive Boulevard frontage. Discourage auto-oriented uses such as gas stations, auto-shops, dealerships, etc. in this area.
- Encourage commercial uses that are compatible with the nearby Bayer campus such as a quick service restaurant or daily needs retail.
- Consider a mix of housing types to encourage residential diversity. The following housing types are appropriate:
 - **Single-Family Homes.** Single-family detached and attached residential uses are favored on the southern portion of the site adjacent to the existing single family residential neighborhoods. Buffering from the adjacent office and R&D uses to minimize conflicts should be incorporated. New residential development should be sensitive to the existing wooded conditions in this area.
 - **Multi-Family Apartments.** Multi-family residential uses with higher density can be integrated with the office or commercial uses to serve as a transition to the single-family uses to the south.
 - **Senior Housing.** Support a variety of senior housing including, apartments, condos, and villas. Higher density housing should be concentrated on the central and northern portions of the site.

Future Land Use

Recommendations Continued:

- Due to the size and location of the site adjoining two major roadways, higher density is appropriate; however, taller buildings (generally over 4 stories) and the most intense activity should be located toward the central and northern portions of the site to minimize impacts to adjoining residential neighborhoods.
- Work with the 39 North District, Bayer, and other partners to encourage building reuse with office and Research and Development (R&D) users to support the growth of the 39 North AgTech District.
- Retention of the existing Bayer conference center (Building R) with a possible hotel component should be considered.

Financial Incentives

Objectives:

- Responsibly consider targeted incentives to encourage investment on this site and facilitate desirable re-use.
- Work collaboratively with the School District to find a solution that meets their needs.
- Ensure collaboration with Police and Fire, ensuring new development considers budgetary constraints.

Recommendations to be created after discussion with City Council

EXHIBIT A

SCOPE OF SERVICES

I. General Description

1. With the potential change in ownership of 92-acres of the current 151-acre East Bayer Campus (the "Site") (outlined in red in the image below), an update to the City's Comprehensive Plan, Creve Coeur 2030 (the "Comprehensive Plan Update") is needed.



East Bayer Campus; the Site, highlighted in red.

The focus of the plan update is to identify appropriate future land uses and development objectives in order to position the Site to positively contribute to the City and the future development of the 39 North AgTech District. PGAV will perform the following tasks:

II. Site Analysis

1. Identify existing conditions and characteristics of the Site including uses, access, topography, flora and fauna, zoning, etc.
2. Understand major factors including the planned 39 North Greenway, the trail connection from Stacy Park, the existing Tealwood Drive connection just south of the site, a potential extension of the Bayer Drive connection from Olive, and any plans for the Lindbergh Blvd overpass connecting the site to the Olia Village development.
3. Analyze Site characteristics and potential for functionality and walkability in accordance with City requirements and best planning and site design practices.
4. Coordinate with the Site's existing owner to gain access to the Site.
5. Analyze uses and conditions of existing buildings located within the Site.

III. Market Analysis

1. Evaluate the market for reuse of some or all of the existing buildings and facilities.
2. Perform market analysis on potential future land uses, including residential, commercial, office, research, and lab components, and for those uses which will further the objectives of the 39 North Master Plan.

3. Describe existing market conditions and project future demand and absorption associated with each use described above and in terms of building square foot or, with respect to residential, number of units.

IV. Development Analysis

1. Identify the future role of this property within the broader 39 North District and how this property can contribute to the goals of the 39 North District and to the adjacent planned Olia Village development.
2. Consider future development scenarios for the Site. Depending on the information revealed in the site analysis phase and the data analyzed in the market analysis phase, these development scenarios may include concepts which include utilizing all existing buildings, utilizing some of the existing with new development, and assuming all existing buildings are demolished, and new development is planned on the site.
3. Provide future development recommendations identifying appropriate land uses, connectivity, open space, massing, building heights, and compatibility with adjacent residential uses.
4. Draft Comprehensive Plan Update.

V. Policy

1. Provide recommendations for development planning review mechanisms such as utilizing the City's planned zoning district procedure.
2. Identify general review criteria for the City's consideration of financial assistance or development incentives.
3. Work with City staff to formalize development incentive review criteria and public processes. This document will help to address incentives the City might be open to considering and what constraints and criteria are likely to be utilized when considering their use.
4. Draft Policy Framework.

VI. Public Outreach

1. Assist City staff with three public outreach components:
 - a) One (1) open house to seek public feedback about the future of the Site. It is anticipated that this meeting will allow residents to understand the current conditions and provide feedback to be used in the Development Analysis phase.
 - b) One (1) open house to review recommendations.
 - c) One (1) meeting to present the final draft of the Comprehensive Plan Update to the Planning & Zoning Commission at the Public Hearing.
 - d) Stakeholder engagement with 39 North partners including the 39 North organization, Bayer, and others.

VII. Deliverables

1. Prepare a written Comprehensive Plan Update addressing the Site, which update shall be in suitable form for adoption by the Planning and Zoning Commission.
2. Site Plans and related maps or GIS data.
3. Development Incentive Review Policy Framework.



Bayer East Campus: Comprehensive Plan Update

Open House
June 16, 2025

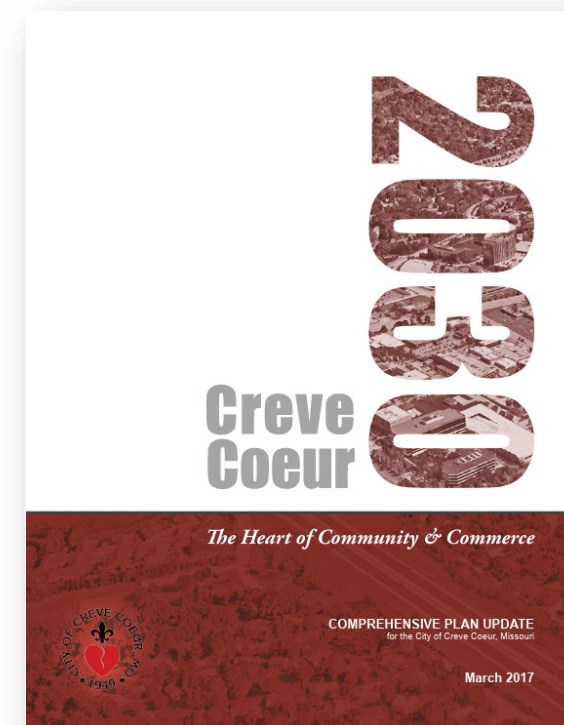
Agenda

- Welcome
- Background & Introduction
- Planning Context
- Existing Conditions
- Your Role



Goals of the Plan

- Update the 2017 Creve Coeur Comprehensive Plan to reflect the updated future for this site
- Understand how this site fits within 39 North and City's overall plan for the future
- Reflect the community's vision for this property
- Identify principles and attributes important to retain
- Provide recommendations for future use of the site



Planning Context

- Located within the 39 North AgTech District
- Adjacent to Olia Village Planned Development
- Accessible off major roadways and central in the St. Louis region
- Represents a significant economic engine and employment base in Creve Coeur



The Site Today

- Large 151-acre site at the corner of Olive and Lindbergh in the City of Creve Coeur
- Has served as Monsanto/Bayer HQ since 1957
- As part of a real estate restructuring plan, Bayer is selling 90 acres (14 buildings, 877,000 square feet)
- Retaining the Bayer Crop Science Office Campus at the northwest corner of the site which will house ~3,000 remaining employees
- Part of a larger trend – shifting away from large, traditional office campuses → consolidating R&D to Chesterfield campus



14 BUILDINGS

877,000 SQUARE FEET

MIX OF OFFICE, RESEARCH, GREENHOUSE,
PARKING, AND OPEN SPACE

BUILDING LABEL	YEAR BUILT	STORIES	USE	CONNECTIVITY	SPECIALITY RATING	REUSE RATING
building M	1999	2+B		stand alone	●○○○○○	EASY
building N	1955	3		stand alone	●●●●○	MODERATE
building O	1981	4		Q, R, S, T, U	●○○○○○	EASY
building Q	1961	4+B		O, R, S, T, U	●●●○○○	MODERATE
building R	1961	2		O, Q, S, T, U	●○○○○○	MODERATE
building S	1961	4+B		O, Q, R, T, U	●○○○○○	MODERATE
building T	1961	4+B		O, Q, R, S, U	●●●○○○	MODERATE
building U	1980	4+B		O, Q, R, S, T	●●●○○○	EASY
building V	1961	2		stand alone	●●●○○○	MODERATE
building V - annex	1980	1		stand alone	●●●●○	MODERATE
building W	1961	2		stand alone	●●●○○○	DIFFICULT
building W - annex	1974	1		stand alone	●●●●○	MODERATE
building X	1961	1		stand alone	●●●●●	DIFFICULT
building Z	1991	1		stand alone	●●●●○	MODERATE
Parking Garage		2+		stand alone	●●●●○	EASY



OFFICE



RESEARCH



CONFERENCE



GREENHOUSE



PARKING

Office Park Changes

1960s: The Birth of the Office Park

- Suburbanization and car culture allow new demand for sprawling campuses
- Office parks are clean, safe, and modern alternatives to the city
- Zoning of the time aligns with civic optimism and postwar economic boom

1970s: Expansionism on the Rise

- Rise of research-driven industry (pharma, aerospace, agri-science)
- Highways continue to fuel suburban growth.
- Federal and Corporate investment signals continued confidence in the model

1980s: Peak Corporate Influence

- Development of “big box” retail & “mega campuses”
- Reagan-Era trickle-down-policies reinforce corporate centrality
- Land use centered around tax base rather than community fabric

1990s: Golden Era of Corporate Campuses

- Biotech & agri-tech thrive, major expansion continues
- Campuses provide amenities oriented inwardly
- On the face, Zoning feels aligned with prosperity & stability

2000s: Early Cracks in Zoning Appear

- Globalization & digital work challenge the centralized office, dot-com bust exposes single-use vulnerability
- Reuse of large office footprints becomes challenging

2010s: Mismatch & Vacancy

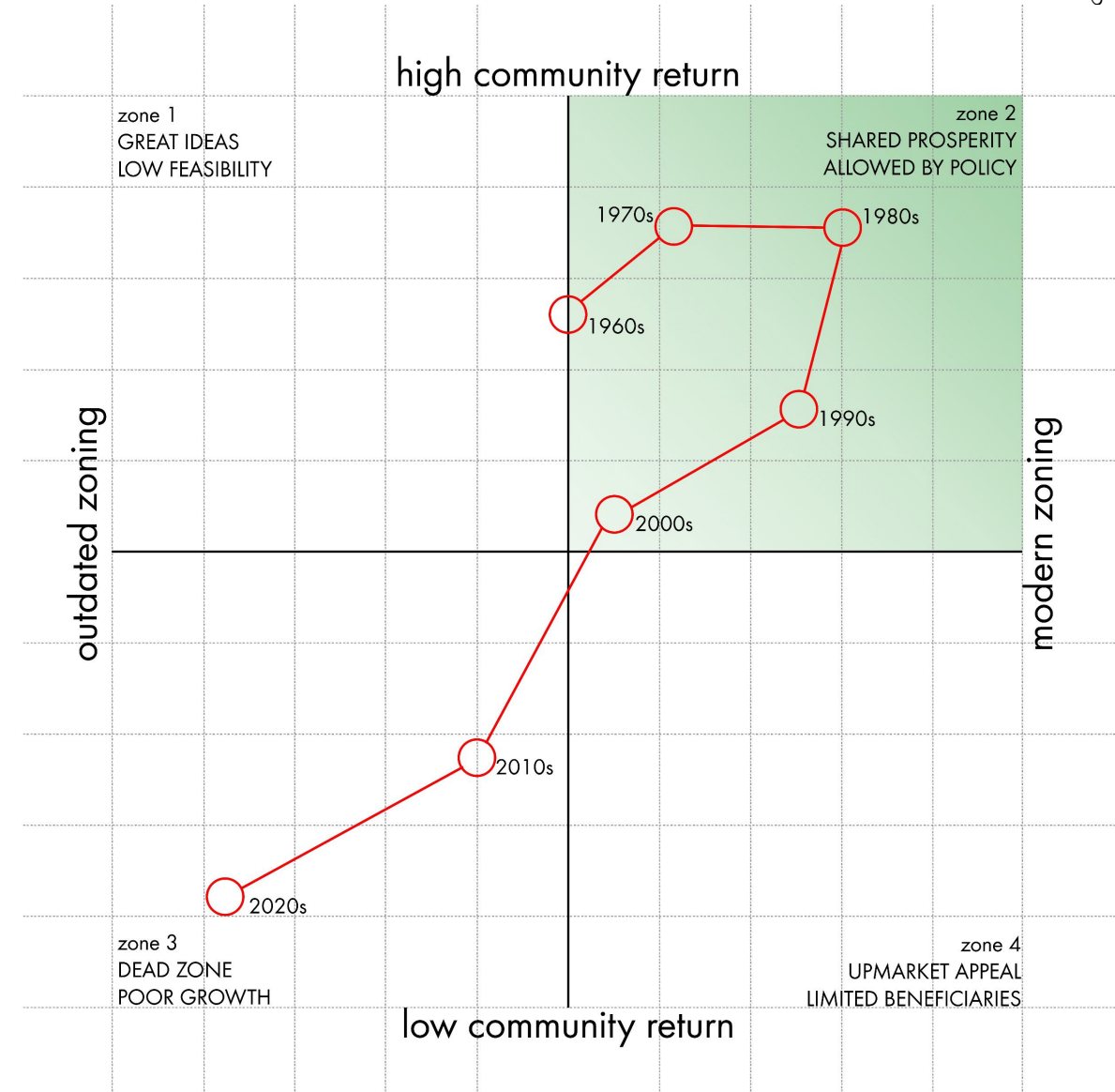
- New workforce seek mixed-used and walkable neighborhoods promoting work-life balance
- Corporate footprint shrinks, remote & global work gains traction
- Antiquated zoning causes stagnation and prevents neighborhoods from adapting with community needs

2020s: Model Collapse

- Major Employers leave, scale down, or merge - no large corporations to fill the void
- Zoning issues compound

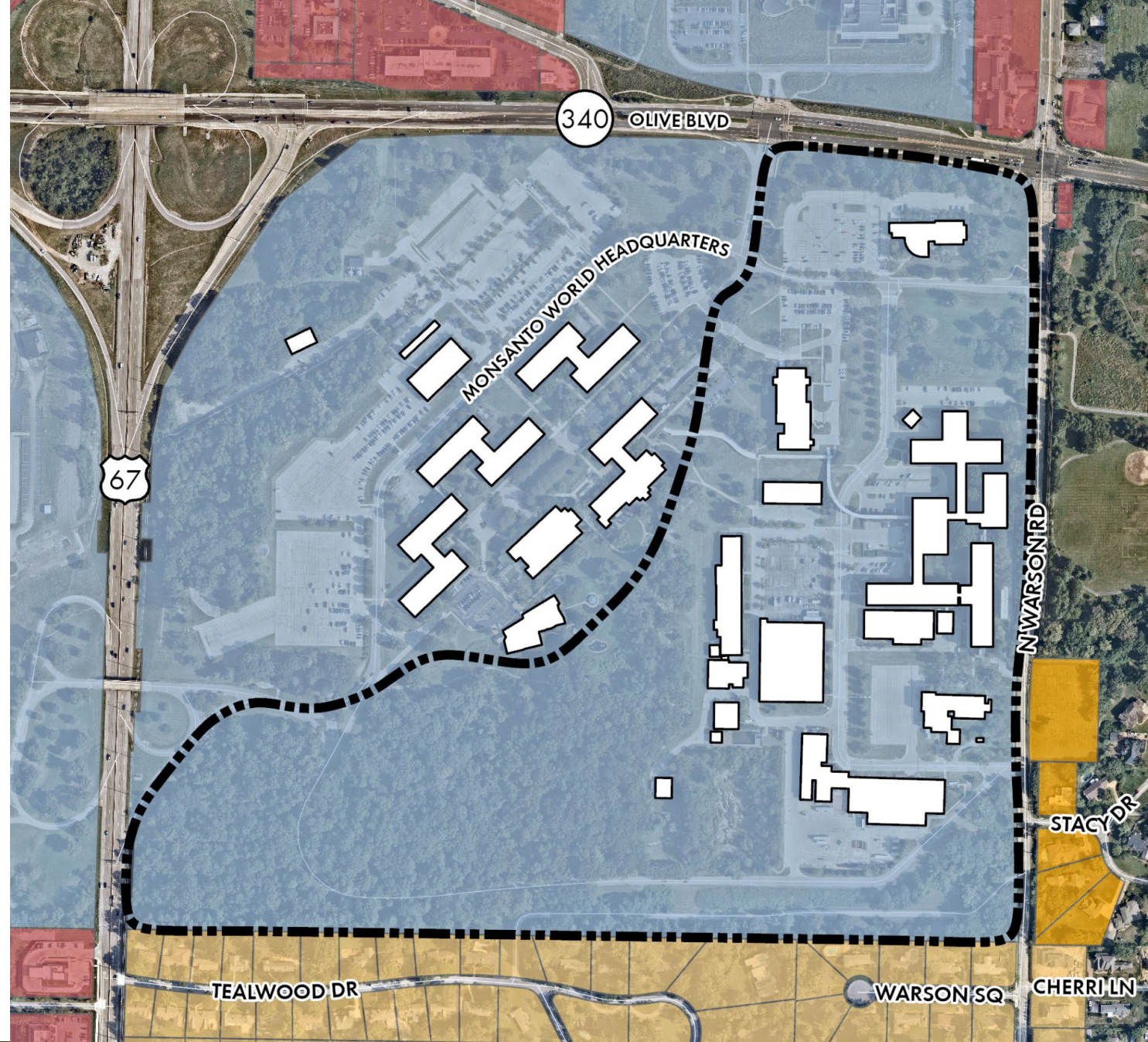
FUTURE

Mixed use communities offer tax resilience and social benefits
Housing, innovation, and open-space-integration are key to reuse
Zoning reform unlocks long-term success for the site and community



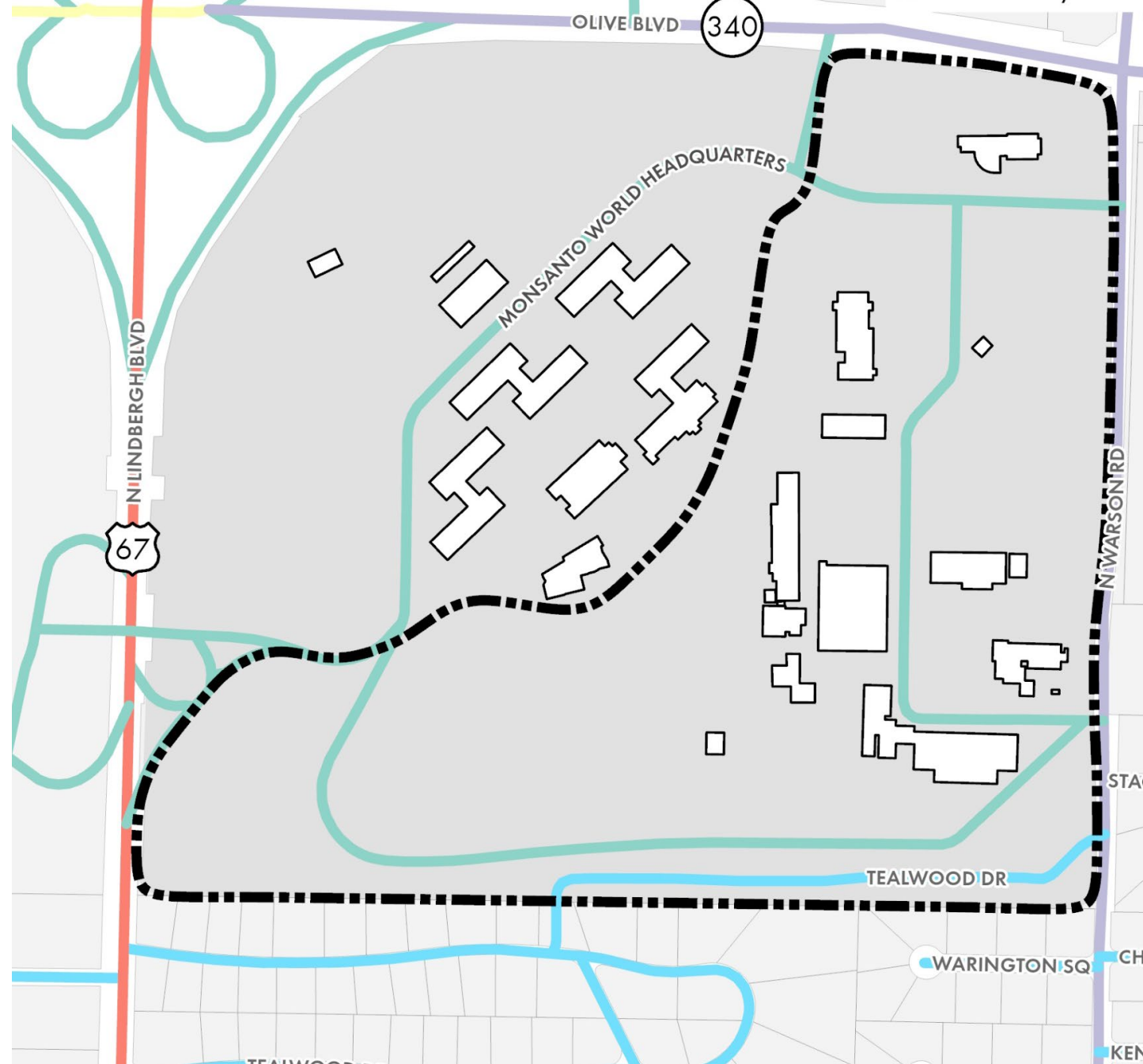
Current Zoning

- Today, the entire site is within the City's RO - Research and Office Park District zoning designation
- Intended to provide for the planned development of large-scale office parks which include extensive laboratories and other similar scientific research facilities
- **Unlikely that a single office or research user will occupy this large site, so zoning updates will be required for any use change**



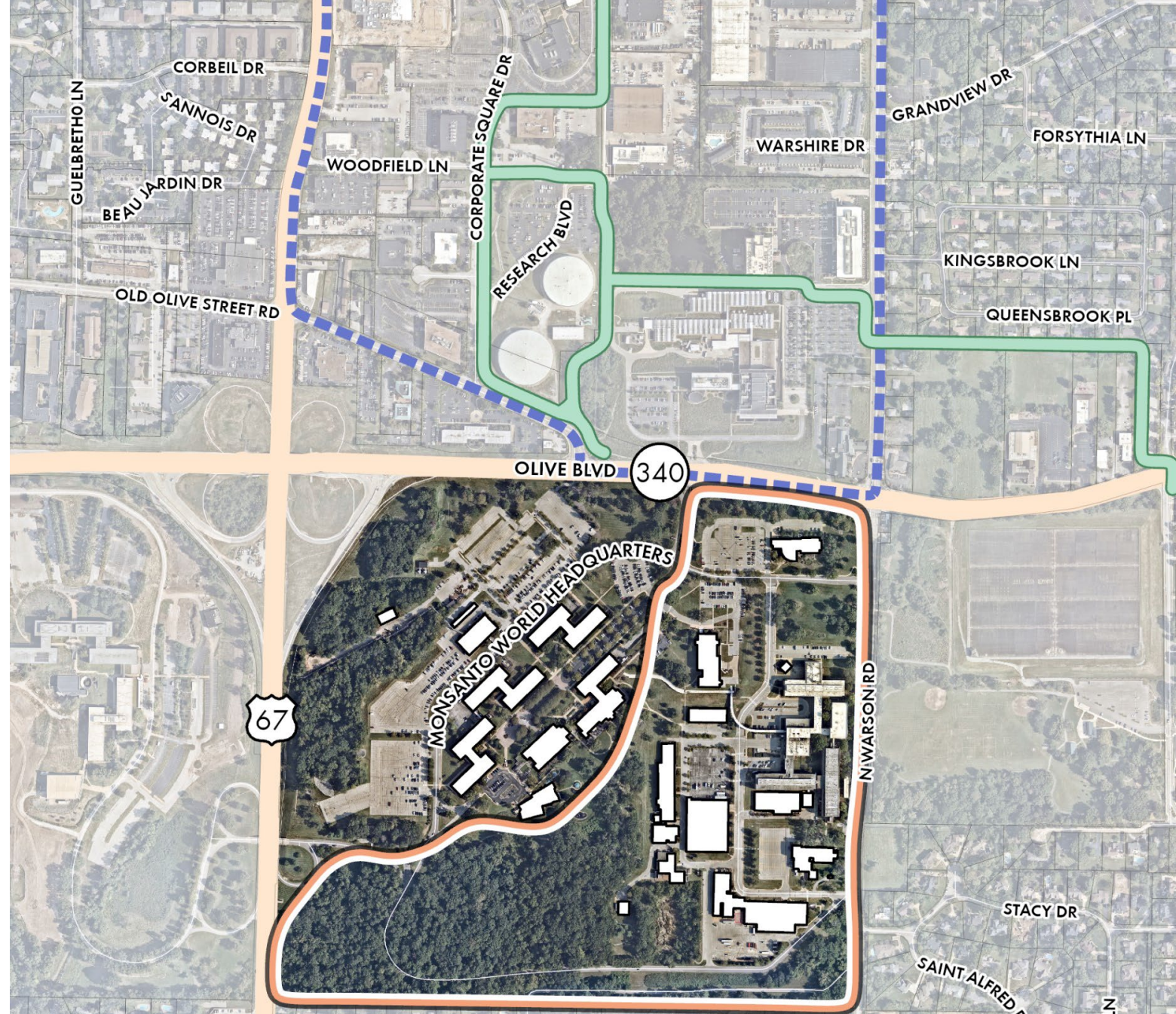
Current Access

- Automobile access off Lindbergh, Olive, and Warson
- Circulation throughout the site for cars
- Private bridge over Lindbergh currently provides auto-access to Olia Village and for turn-around use
- Bayer-owned private access road for Tealwood Subdivision at the southern edge of the site
- Limited bike-ped amenities or connections currently within the site



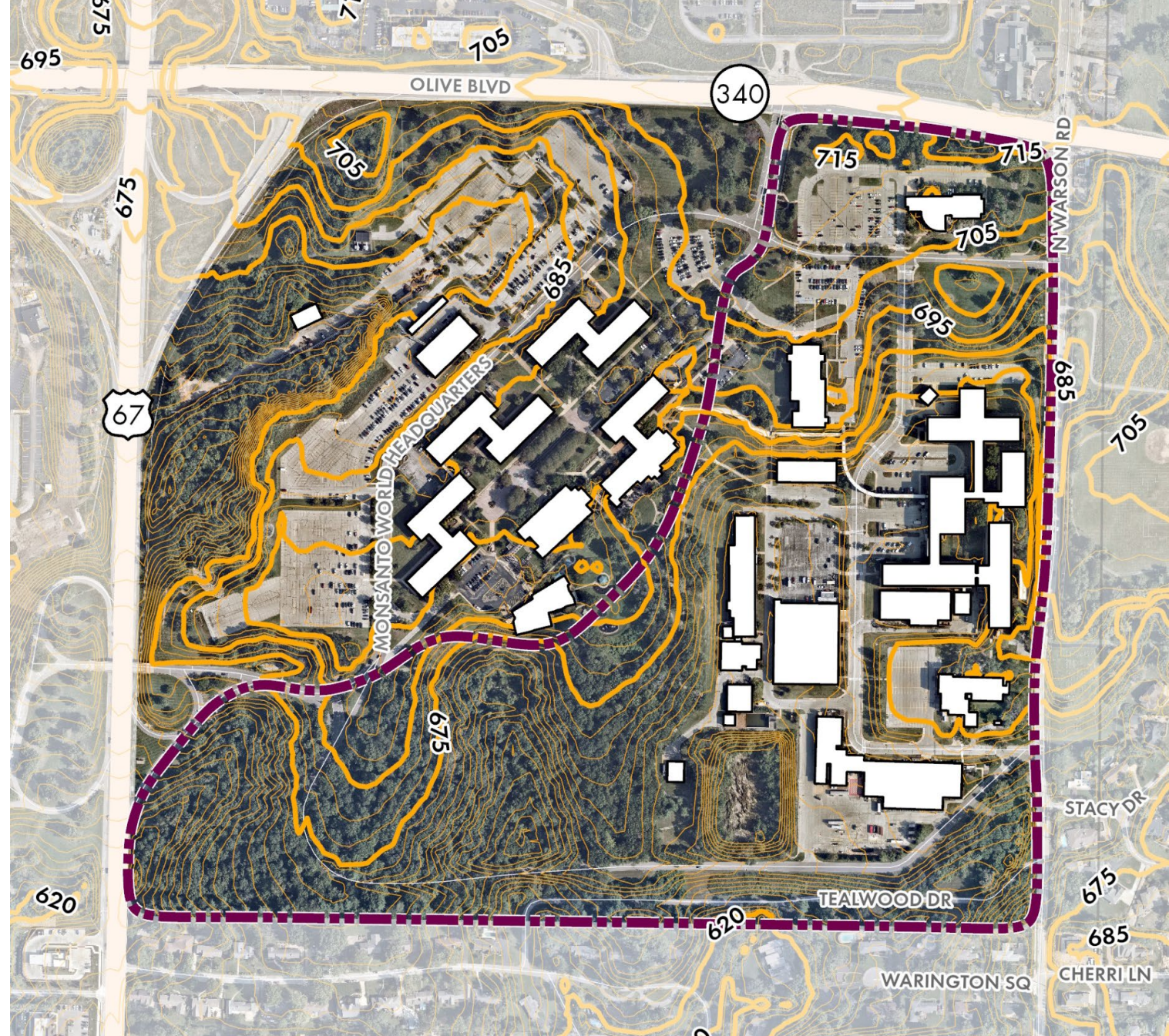
Connectivity

- Potential connections to planned 39 North Greenway and proposed trails to the north
- Stacy Park is directly east of the site
- 39N Plan & 2017 Comprehensive Plan identified increase bike/ped connectivity as goals



Site Characteristics

- Slope and topography varies across the site
- Natural features (trees, plants, animals) present on the site, particularly at the southwest corner)
- Existing residential buffers



Your Role

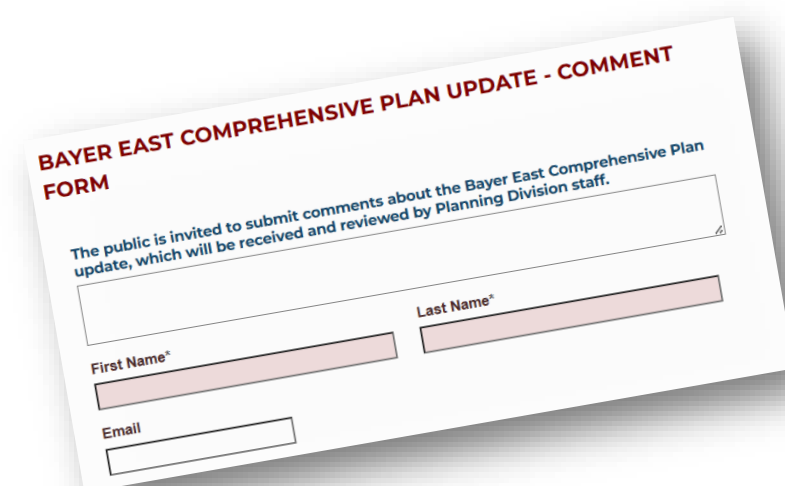
Insight/Feedback on:

- Appropriate Uses
- Connectivity
- Buffering / Environmental

Share more thoughts
on the website!



SCAN HERE!

A tilted image of a comment form titled "BAYER EAST COMPREHENSIVE PLAN UPDATE - COMMENT FORM". The form includes a paragraph stating: "The public is invited to submit comments about the Bayer East Comprehensive Plan update, which will be received and reviewed by Planning Division staff." Below this text are three input fields: a large text area for comments, a "First Name*" field, and a "Last Name*" field. At the bottom is an "Email" field.

Next Steps

Provide your feedback tonight!

The PGAV team will assess community feedback, analyze the market, seek to understand other plans, examine scenarios and seek to identify ***principles for future development on the site!***

Open House #2 – Late Summer 2025

Adoption – Fall 2025





THANK YOU!

Creve Coeur Comprehensive Plan Update- Comment Overview

Key points:

There is a Strong Desire for Green & Open Space

- Widespread support for:
 - Parks, open green areas, and preserved woodlands
 - Walking, biking, and hiking trails
 - Dog parks, athletic fields, and recreational amenities (e.g. ice rink, cross-country skiing)
 - Integration with Stacy Park and existing greenway plans (like 39 North)

“Please keep it green space. There are no parks in the eastern section of Creve Coeur.”

Clear Opposition to Residential Development

- Many residents oppose new residential uses, especially multi-family housing
- Concerns include:
 - Traffic congestion (particularly on Warson, Olive, and Lindbergh)
 - School capacity impacts
 - Overdevelopment and prioritizing developers' interests over residents

“No residential – traffic issues, school enrollment issues, etc.”

Environmental & Infrastructure Concerns

- Desire for environmentally responsible redevelopment, including:
 - Water runoff and flood management (especially near Tealwood and the southern boundary)
 - Preservation of trees and buffers, especially near residential neighborhoods
 - Safe remediation of asbestos and groundwater contamination
 - Light and dust pollution controls during and after construction
 - Better utility reliability, particularly electricity and telecom lines serving Tealwood

“How will the retention pond be remediated in an environmentally safe way?”

Traffic & Connectivity

- Traffic impact studies requested for Warson, Olive, Lindbergh, and nearby roads
- Strong push for bike and pedestrian connectivity, including:
 - Preserving Monsanto Drive bridge for non-vehicular use
 - Extending trails from Stacy Park
 - Linking to broader greenway network

Desired Land Uses & Amenities

- Research, innovation, and institutional uses:
 - IT, AI, pharmaceutical, crop/plant science labs
 - Conference and meeting space
- Civic and cultural amenities:
 - Cultural arts center
 - Community recreation center
 - Retirement housing/community
- Entertainment and mixed-use ideas:
 - Example: Streets of St. Charles-style development for daytime and evening activity
 - Limited support for mixed-use where it includes green/public spaces

Community Character & Legacy

- Emphasis on maintaining:
 - Buffers and easements (e.g., Tealwood easement road)
 - Design quality and community-scale development
 - Suggestion to consider a place name for the area: “*The Boot*”
-

Visioning

Zones

Southwest

Keep Open Space and make trails and Dog Park, keep exit
Preserve Existing portions of treescape, Keep overpass
Keep Trees, Wildlife, Nature Walkways
Keep Overpass Open, Consider Park-city/county owned; Keep overpass
Open Greenspace/Adequate Buffer zones
Open Space
Open Space
Open Space
Open Space
Retention Pond
Keep Open Space/Nature/Hiking/Biking/Walking
No Comment
Park

Southeast

Commercial/Office w/ Roads
No Comment
Keep Trees, Wildlife, Nature Walkways
Keep access for tealwood and maintain greenscape
Open Greenspace
Open Space
Dog Park
Walking and Bike Paths/Dog Park
Cultural Arts Center
No Development; Will worsen flooding
Keep Open Space/Nature/Hiking/Biking/Walking
Please reserve access road to neighborhoods
Maintain Greenspace buffer- Low Rise Office/Research; No Residential

Northeast

Commercial/Office
Improve Public Walkable connections
No Comment
Prefer Office Development- 2-4 stories high. Would be open to SF along Warson Rd
No Comment
Athletic Fields w/ Dog Park; No Residential
Walking Trail/Paths, Ice Skate Complex, XC Skiing in Winter
Walking/Bike Paths
Cultural Arts Center; Bidke/walk paths
No Comment
No Comment
No Comment
No Comment

General Comments

Bordering neighborhoods need to be considered unlike development on the West Campus
Athletic Fields, Mountain Bikes, Trails
Can some of the lab space be used to support the 39 North Biotech campus plans and vision to support start up companies
Cultural Arts Center
Large Park and Extension of Stacey Park
Need luxury villas/condos in the wood areas
Preserve open space w/ walking trails and XC in winter, dog park
Community Pool; Athletic Fields
Prairie Land/Mo Habitat
No Housing; Traffic is already a nightmare on Warson
Athletic Complex w/ Swimming Pool and Tennis Courts
Athletic Complex w/ walking trails and dog park
Open Space Preservation with walking paths, biking, and fields for youth sports
Medical or Healthcare Campus
Area should have strong research, mixed use living options for scientists to keep purpose (39 North) alive w/ room to grow
Connection to Lindbergh development, Public pedestrian connections, Preserve portion of SW Treescape
Would like to see greenscape next to Tealwood to preserve character. Would not mind SF housing
Keep majority green space with mature trees. Houses, possible a gated community for the rest.
Green space! We need more in Creve Coeur
Community Recreation Area

Opportunities

Opportunity for benefits for residents including open space, parks, trails, etc. Non concrete nature options; non residential
Community Garden
Benchmark against other municipality uses of open space and retail; Town & Country Town Center @ Clayton/Mason. Shopping Center
Pedestrian Bridge added to West Lindbergh (67) Cloverleaf. This was brought at Olea Meetings. Now the East campus is in play!
Open Space nature park wildlife
Please consider creating large park
Sports Training facility; IT & AI facility; Crop plant sciences; Conference Space for Mallinckrodt and Nestle
Compliment and not duplicate Olia Village and 39 N. connecting all three sites via walkability. Green space retention; park as part of Bayer East
Try to strike a balance between corp interests, tax base, and QoL for residents
Bike/Walk access to Green Riverway/Millennium Park

Concerns

Maintain natural greenspace at southeast corner as a resident of sunswept thius was very important and final design was good

More development of multi-use small lot SF homes in an already overdeveloped area of empty units available

Increased traffic when Warson is already backed up during school/rush hours

Traffic!! Already very bad on Warson Rd

Traffic and water run-off/flooding

No more light density residences. Maybe exclusive subdivision

Open space or park next to Tealwood. Then single family north of that

Greenway or park or forest as is next to Tealwood. High end single family homes north of that

Open space or exclusive subdivision- single family homes

Overdevelopment, high density, water run-off, shrinkage of greenspace, need space barrier between development and existing residential, Traffic

Warson Traffic is bad enough already

Park, walking trails. Great opportunity to address bordering neighborhood concern

Bayer East Campus: Comprehensive Plan Update

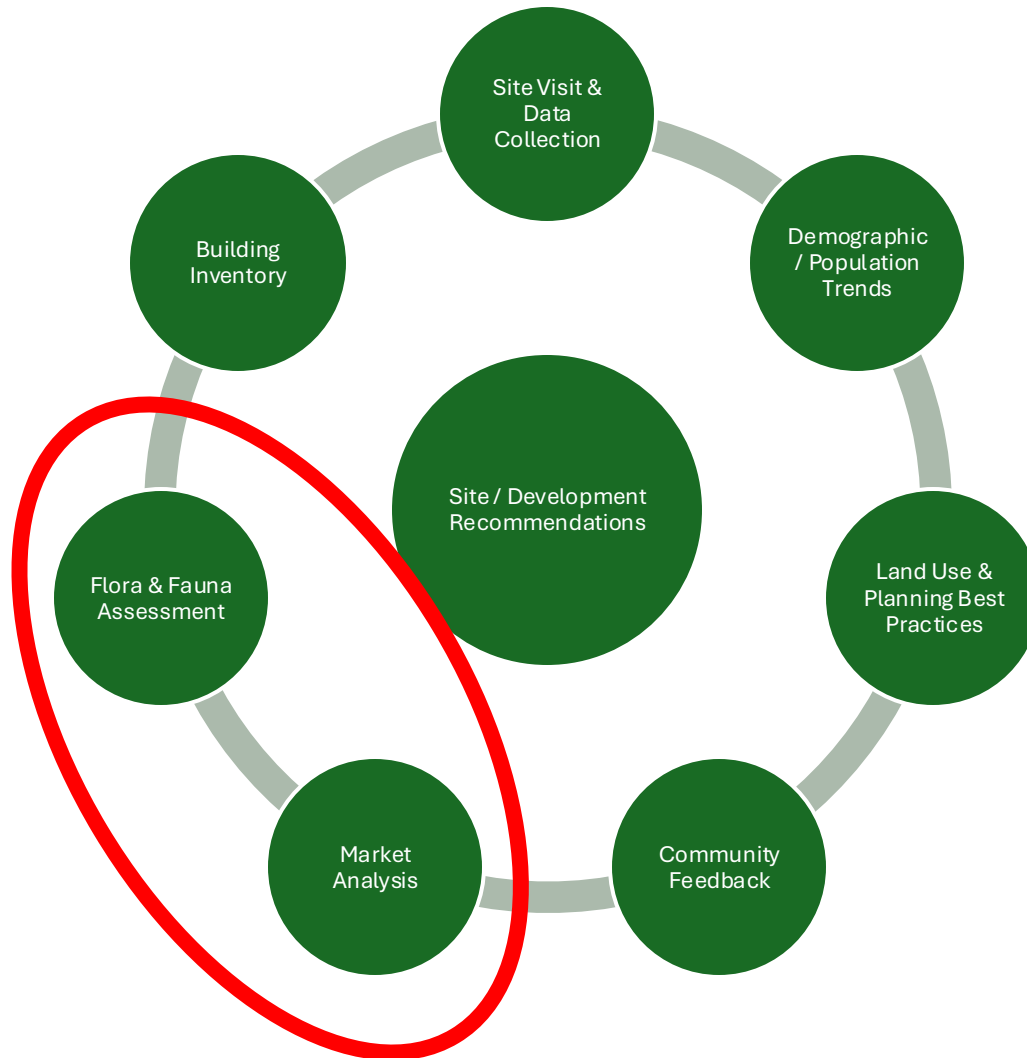
Planning & Zoning Commission – Aug 18, 2025

Site Understanding → Recommendations



All of these factors have to be weighed to understand potential for the site AND what makes the most sense here in Creve Coeur

Site Understanding → Recommendations



All of these factors have to be weighed to understand potential for the site AND what makes the most sense here in Creve Coeur



Flora & Fauna Assessment

Purpose – to establish a baseline understanding of environmental conditions and assets on the site currently

- Conducted on foot on June 9, 2025 by a Certified Arborist, Certified Ecological Restoration Practitioner in Training
- Remote analyses were conducted to supplement on-site data collection



Findings

- Over 30 species of native trees are present on the site
 - Bulk of tree canopy is 60-80' tall
 - Some trees may exceed 100 years old
- Forest floor includes native woodland wildflowers, spring ephemerals, and native herbaceous species
- Invasive honeysuckle is present in several areas – signage noting removal efforts have taken place
- Restored tallgrass prairie community acts as standalone habitat for plants and animals – proximity to undeveloped forest elevates the wildlife habitat overall



Findings

Dead trees/snags, fallen trees, and tree-throws were observed creating wildlife habitats for the following:

- 15+ species of bird spotted (more detected by ear)
- Wild turkeys
- Owls
- Deer
- Bats
- Small mammals
- Reptiles
- Amphibians
- Native pollinators
- Insects
- Fungi





Conclusions

- The undeveloped forested zone of the site is a valuable ecological asset to the community, providing an island of undisturbed, quality wildlife habitat to numerous taxa and species
 - It is one of the few remaining intact and undisturbed stands of forest 25 acres or larger within the surrounding metro area
 - If preserved, invasive plant removal and management efforts should be made
- The developed zone contains significant tree canopy which should be prioritized during future development
- The remaining Bayer campus at the northwest corner of the site has significant ecological value
- Additional ecological surveys should be performed by future owner to further document the biological diversity across the site and mitigate impacts
- Improvements in this area could be made while maintaining a concentrated habitat including – walking/biking trail, nature play area, connectivity to other greenways, gathering spaces, etc.

Market Analysis

- Reviewed the following uses:
 - Residential
 - Commercial
 - Office
 - Hotel
- Existing Market
- Demand / Potential Absorption
- Implications



RESIDENTIAL

Existing Market

- Creve Coeur has diverse housing options, and all perform well in the market. The Ladue School District adds a lot of value to housing within its boundaries.
- Any type of housing should perform well.
- Less common housing types in the current market include new, smaller for-sale single family housing (missing middle and starter home style) and larger (3+ bedroom) rental housing, and newer condos.



RESIDENTIAL

Demand / Potential Absorption

- Multi-family in this part of Creve Coeur should consider planned Olia Village development which will add significant inventory to the area if fully built-out according to approved plan
- There could be demand for additional townhomes in a few years once Olia Village townhomes are absorbed. Similar housing types like villas and condos that are more senior-friendly are good alternatives as well.
- There are a growing number of single-occupant households, more residents over 65, and fewer residents under 18 in Creve Coeur and the region generally, meaning cities should plan for smaller households than in the past.



RESIDENTIAL

Implications

- Both lower-cost and luxury homes do well in the Creve Coeur market, although they are often spatially separated. Combining homes of different sizes and types can create more naturally mixed-income neighborhoods.
- Continuing to add housing where possible will help to keep Creve Coeur affordable and renew its building stock.
- Both smaller and larger housing types find an audience in Creve Coeur, but there is greater growth in the number of smaller households both locally and regionally.



COMMERCIAL

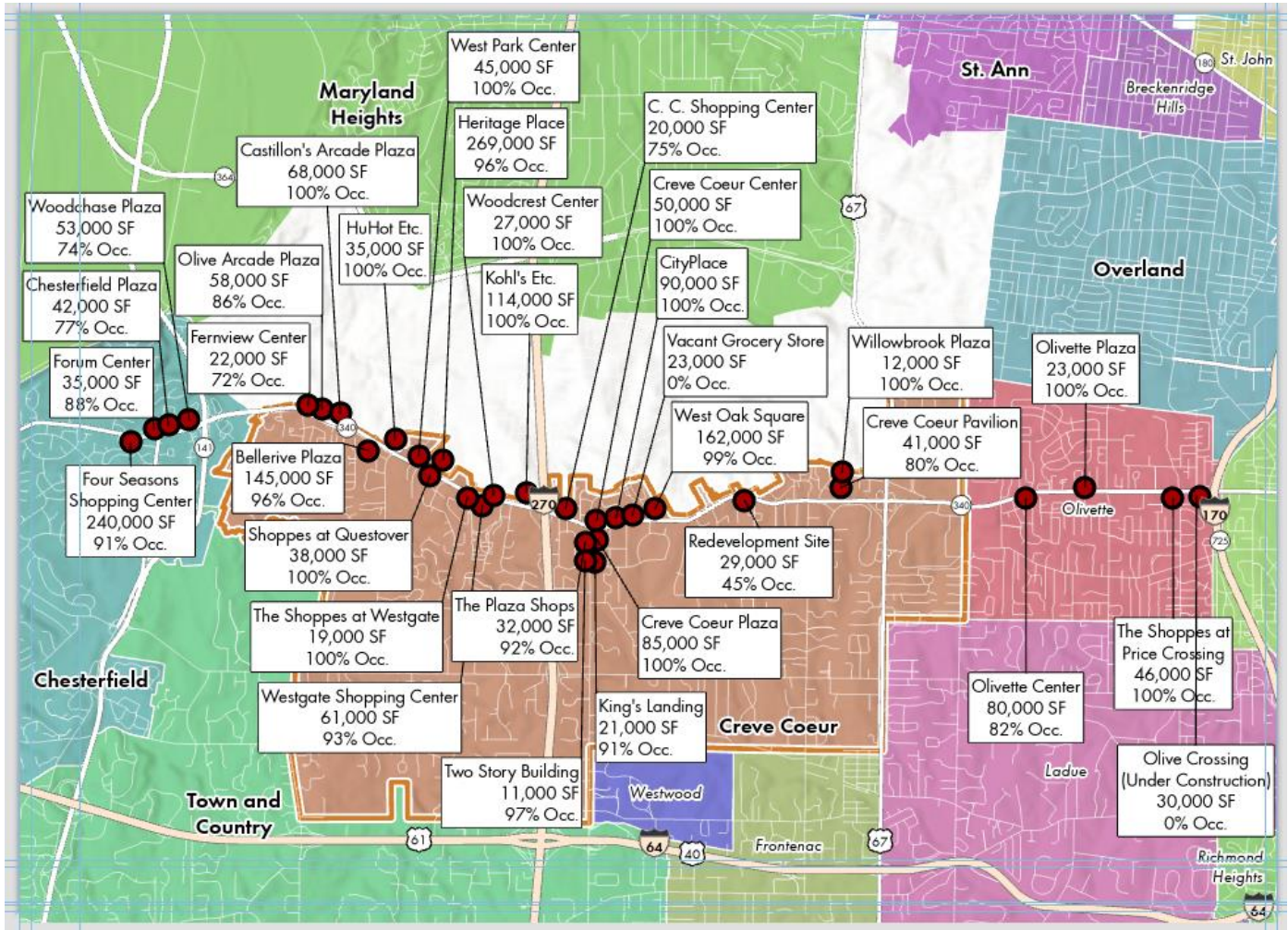
Existing Market

- Most retail consists of retail strips and shopping centers along Olive. Residents of Creve Coeur enjoy very good access to grocery stores, restaurants, banks, and personal care services.
- Businesses looking for space also have very good access to small (<5,000 square feet) spaces at a variety of price points.
- Retail square footage has increased by an average of 0.3% annually in Creve Coeur since 2010, adding an average of 4,100 sf per year during that time. Households have increased by an average of about 0.7% during that time, about 54 households per year.
- As the city develops, there is demand to redevelop some of the older, underperforming retail sites.



COMMERCIAL

Existing Market





COMMERCIAL

Demand / Potential Absorption

- Retail shopping centers in Creve Coeur and nearby areas (Chesterfield, unincorporated area, and Olivette) have overall strong occupancy.
- Factors positively impacting occupancy: location (especially co-located with other stores and activity generators), visibility, condition/age.
- Outparcel retail performs well. Olive Boulevard also supports a large number of small retailers in strip style shopping centers.
- Creve Coeur should easily be able to add 4,100 square feet of retail annually in a typical year.
- Olia Village housing adds demand for about 172,000 square feet of retail. Plans call for 331,000 square feet, so the demand to support new Olia Village retail will need to come from outside of the development and the City.



COMMERCIAL

Implications

- Retail appears to perform the best in the busiest areas of Creve Coeur, near 270. It may struggle a little outside of retail and activity nodes but would benefit from adding supportive uses nearby (housing, other retail, employers, activities).
- Olia Village will add a lot of retail in a short amount of time and may cause a dip in retail occupancy as the market absorbs it.
- Even with a lot of existing retail, Olive Boulevard is a strong location for strip and outparcel retail.



OFFICE

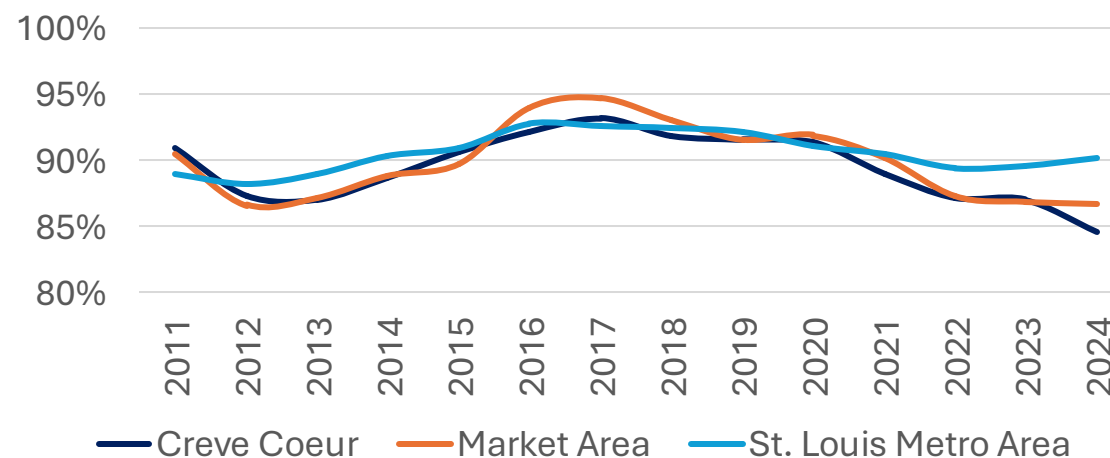
Existing Market

Even with return-to-office, the office market is struggling to fill space left vacant after the pandemic. Cities that had a lot of professional office space are feeling this trend the most.



Office Occupancy 2010-2025 YTD

Source: Costar, 2025





OFFICE

Existing Market

Office occupancy at major multi-tenant office nodes/buildings:

	Square Feet	Occupancy
CityPlace	1,137,000	80%
Creve Coeur Executive Office Park	773,000	80%
Creve Coeur Center	614,000	74%
Corporate Square	553,000	95%
Bellerive Executive Park	447,000	92%
West Park	422,000	77%
39 North	307,000	89%
Westview Place	126,000	24%
Paragon Building	115,000	82%
Creve Coeur Pointe	112,000	30%



OFFICE

Existing Markets

- Much of Creve Coeur's office supply was built before 1990 (71%).
- About 1/3 (27%) of offices, especially older offices, are one- or two-stories – redeveloping with taller offices can be a more efficient use of space.
- Since 2010, Creve Coeur has added “typical” office space at a rate of 37,000 net new square feet per year, an average annual growth rate of 0.6%. For comparison, the market area grew by 0.1% and the region also grew by 0.1%.
- Medical office space was added at a rate of 2,250 net new square feet per year, at an average annual rate of 0.2%, compared to 0.3% in the market area, and 0.7% in the region.





OFFICE

Demand / Potential Absorption

- Current occupancy for “standard” office space in Creve Coeur is 85%.
- Need to reoccupy 670,000 square feet to get back to “full” occupancy (95%)
- Current occupancy for medical office space in Creve Coeur is 93%
 - Not as impacted by remote work
 - A stronger market but clustered in two main areas (N New Ballas & Barnes West)
- Demand for lab space is currently low
 - Cortex, 39 North, other life science hubs nationwide are currently growing at slower pace
 - Potential for demand to increase over time, locally, as 39 North District grows





OFFICE

Implications

- Olia Village plans call for 492,000 square feet of new/reused office space. There is also currently about 670,000 square feet of office space to re-lease to attain full occupancy.
- In the current office environment, demand for typical and research office space is low. Since 2010, Creve Coeur has added 37,000 new square feet of office space annually.
- Medical office is a stronger but smaller market, and medical offices tend to locate within proximity to one another.
- Although the office market is weak, there are opportunities to create newer, more modern office developments in the City.





HOTEL

Existing Market

- 341 hotel rooms
 - Located at I-270/Olive Boulevard
- Other nearest hotels are at I-270/Page (Westport) and I-270/Dorsett
- 3,265 total rooms at these three interchanges
 - Has grown by 17 rooms/year since 2010
 - 0.9% yearly growth



HOTEL

Demand / Potential Absorption

- Hotel room demand driven by:
 - Proximity to activity generators (airport, highway, convention center, visitor attractions, medical facilities, or large employer)
 - Bayer hotel-room potential - \$1.2M in spend, 7,400 nights per year of hotel nights booked by Bayer
- Current hotels in Creve Coeur co-located near highway interchange and near restaurants/shops
- Three-interchange subarea occupancy is good (61.5%), and slightly lower than market area average (63.1%).
- Two new hotels proposed for Olia Village (251 rooms) – represents 74% increase in hotel rooms



HOTEL

Implications

- Adding hotel rooms without adding activity generators to increase room nights is likely to increase competition and decrease occupancy across the City's hotel room pool.
- Hotels closer to the interchange will have a more competitive location, since most people prioritize convenience.
- Having nearby amenities (food, activities) also helps to make a hotel more attractive – the West campus area is better suited for hotels since it is more walkable.
- Bayer hotel nights are likely considered in the Olia Village hotel potential – concern that a hotel on the east campus could challenge success there.
- Inclusion of a conference facility adjacent to Bayer may improve potential for hotel success in this area.



Conclusions

- Taking Olia Village into account, the strongest demand in Creve Coeur is for for-sale housing.
 - Opportunity for mixed-size, mixed-income housing development that targets various life stages and family sizes in a pleasant environment.
- Retail fronting Olive Boulevard with good visibility should do well.
 - Doesn't need to be extensive – 40,000 sq ft
- Office development is not recommended until there is more absorption of existing, vacant office space and Olia Village development.
- Hotel development should be prioritized on the Olia Village portion of the interchange in order to take advantage of the walkable retail planned there, though the inclusion of a conference facility could make this site a viable option.

Initial Draft Recommendations

- Prioritize Open Space in a way that allows for development while also preserving the existing tree canopy and maintaining a concentration of forested area
- Ensure a suitable buffer is retained between the area and the residential to the south while access to Tealwood Subdivision is preserved.
- Focus on connectivity to surrounding areas – improved crosswalks, greenway connection, maintain bridge access, etc.
- Capitalize on Olive corridor to create new business opportunities for successful retail
- Create new housing opportunities for residents in Creve Coeur – focusing on a mix of housing types
- Coordinate with 39 North, Bayer, and future developer to determine utilization opportunities for the existing Bayer R&D facilities