

2008 Development Activity Trends Report for Prince George's County



*The Maryland-National Capital
Park and Planning Commission
www.mncppc.org/pgco*

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Executive Summary

The Development Activity Trends Report for Prince George's County identifies recent development activity (approved subdivisions and new building construction) in the county and anticipates the future of residential and nonresidential growth by 2015. The following are highlights from the report:

- **Factors Influencing Recent Development Activity**—Between 2001 and 2007 the county grew annually by approximately 4,890 residents. Despite this growth, the slowdown of the national economy has resulted in decreased sales of new and existing homes in the county. Total dwelling unit completions in the county decreased from 4,037 in 2007 to 2,641 in 2008. Vacancy rates in the commercial market have been steadily increasing since 2005 and suggest there is a declining demand for the current stock of office, industrial, and retail space in the county.
- **New Residential Building Completions**—In recent years there has been a resurgence of multifamily development in the county differing from that of the past by consisting of more midrise structures, less of the garden-style variety, and more condominiums versus apartments. Most new single-family residential units built in 2008 were located in the central portion of the county in communities such as Largo, Bowie, and Upper Marlboro.
- **New Nonresidential Building Completions**—Two-thirds of total new nonresidential space (approximately 2.6 million square feet) was developed for hotel and accommodation uses. The large quantity of hotel space built in the county in 2008 is a result of a number of luxury hotels constructed at National Harbor.
- **Development Tiers**—In 2008 a quarter of new residential construction in the county was located in the Developed Tier. Fifty-two percent of new residential development in the Developed Tier was multifamily development. Two-thirds of new residential development occurring in the county during 2008 was in the Developing Tier. The Developing Tier has had a majority of the county's new residential growth in recent years.
- **Residential Pipeline Development**—In 2008, a majority of approved residential subdivision cases were located in the northern part of the county along designated growth corridors established in the 2002 General Plan. The largest residential projects approved for subdivision in 2008 were Konterra Town Center East, The Brick Yard, Bevard, and University View.
- **Forecasted Growth**—Communities that are expected to generate the largest share of residential growth between 2010 and 2015 are Tippett, Westphalia, South Potomac, Brandywine, College Park, and Laurel. The highest employment during this period will be in the Northwestern, South Potomac, Westphalia, Melwood, and Hyattsville planning areas.

Introduction

The Development Activity Trends Report for Prince George’s County presents data and trends pertaining to rezoning, subdivision, and building activity that occurred during 2008. The review of development activity during the past year provides a picture of growth trends in Prince George’s County. This report is intended to identify these trends and the direction of anticipated development. This document should prove useful for planning activities including land use planning, facilities planning, and market analysis.

This report is divided into five sections: Factors Influencing Recent Development Activity, Growth Indicators, New Development Activity, Development Activity Trends, and Forecasted Growth. Factors Influencing Recent Development Activity and Growth Indicators present data that illustrate county trends indicating development pressures derived from changing populations, a shifting economy, and rezoning. The third section, New Development Activity, highlights major residential and nonresidential development activity in the county for 2008. Development Activity Trends provides data on approved subdivision and new building completions from 2006 to 2008 for all seven subregions in the county; information is also provided by the Policy Tiers. The last section, Forecasted Growth, references M-NCPPC’s cooperative forecast to illustrate expected dwelling unit and employment growth between 2010 and 2015.

Definitions for zoning categories referred to in this report are located in the appendix.

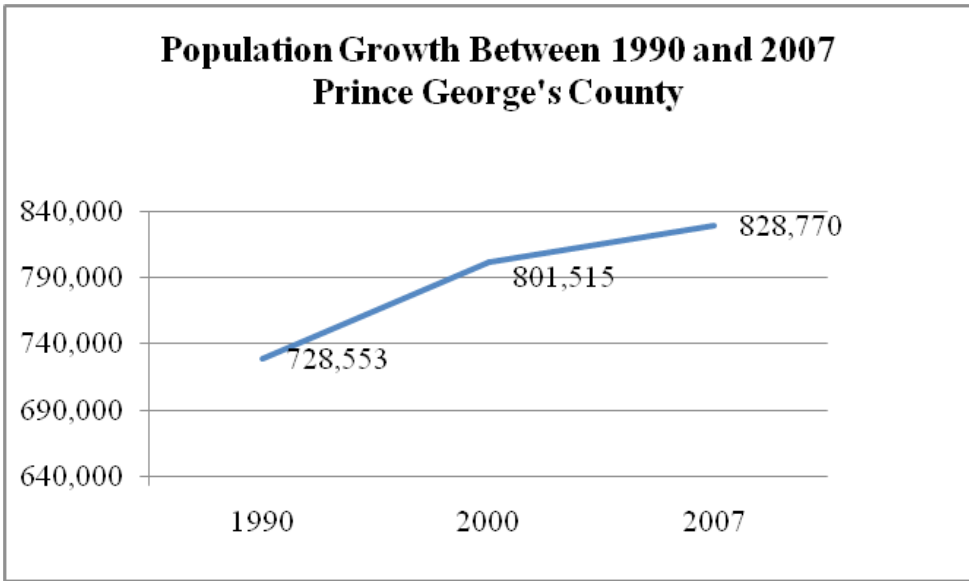


Continuing construction at Melford in Bowie

Factors Influencing Recent Development Activity

Population

Prince George’s County is a diverse community that is continuously growing. Data from the U.S. Census Bureau’s population estimates program show that Prince George’s County’s population has increased at an annual growth rate of 0.61 percent between the years 2001 and 2007. This equates to approximately 4,890 new residents a year. For comparison, the average annual growth rate from 1990 to 2000 was one percent, which equated to 7,296 new residents a year. So, while the county is not growing as fast as it did in the past decade, there is still a steady increase of new residents coming into the county who will require quality housing options.



Source: US Census Bureau

Housing Stock

Table 1

Median Year Housing Structure Built	
Jurisdiction	Year
Anne Arundel County	1979
Charles County	1985
Howard County	1985
Montgomery County	1977
Prince George’s County	1972
Washington Metropolitan Area	1977

Source: 2007 American Community Survey 1-Year Estimates

The supply of quality and affordable housing is essential to maintain a vibrant community and diverse population base. While there is a range of affordable housing options in the county relative to the region, the county has an older housing stock (see Table 1).

Having an older housing stock relative to the region is one factor that can drive new residential construction or revitalization of older communities in the county. With new jobs and residents coming to the Washington Metropolitan Area every year, it is important that the county remain competitive in its ability to provide quality housing options.

Residential Permits

County residential permitting and construction activity has fluctuated with an increasing trend since 2000 (see Tables 2 and 3). However, due to the state of the national economy, residential development activity in the past two years shows a recent decreasing trend which reflects current market conditions.

Table 2

New Residential Building Permits			
	Single-family*	Multifamily	Total
2000	2,543	209	2,752
2001	3,049	0	3,049
2002	2,470	78	2,548
2003	2,808	128	2,936
2004	1,875	73	1,948
2005	3,255	170	3,425
2006	2,918	115	3,033
2007	1,462	721	2,183
2008	1,012	308	1,320

Source: U.S. Census Bureau

* Includes townhomes

Table 3

Estimated New Dwelling Unit Completions				
	Single-family Detached	Single-family Townhouse	Multifamily	Total
2000	1,933	1,075	451	3,459
2001	1,997	830	34	2,861
2002	2,434	639	611	3,684
2003	1,864	197	310	2,371
2004	1,973	226	365	2,564
2005	2,202	443	596	3,241
2006	1,898	487	517	2,902
2007	2,480	346	1,211	4,037
2008	1,242	499	900	2,641

Source: Maryland Tax Assessor's File

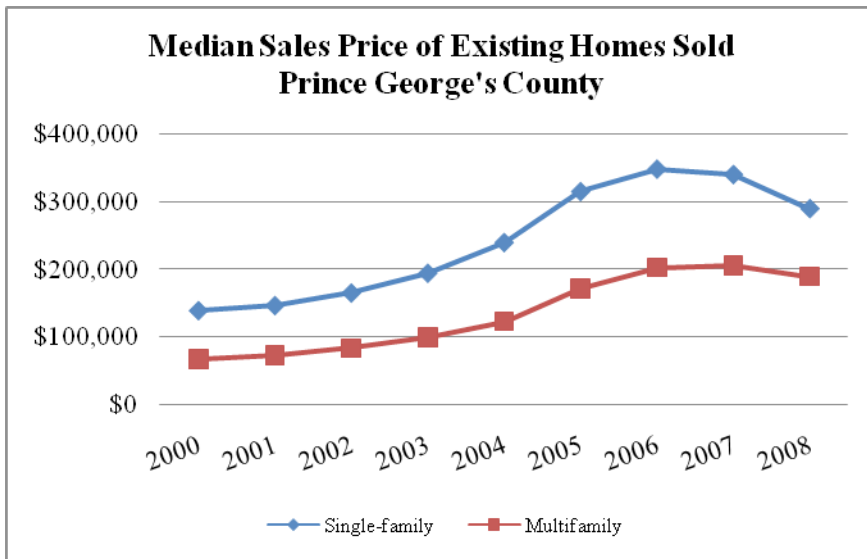
Housing Market

Existing Homes Sales

Existing homes sale price trends have also been in decline since 2006, following the nationwide collapse of the housing market. Since 2006, the median sale price of existing single-family, and multifamily homes in the county has dropped by 16 percent and 7 percent, respectively (see Chart 2). Despite this, current median sales following 2006 still exceed those previous to 2005.

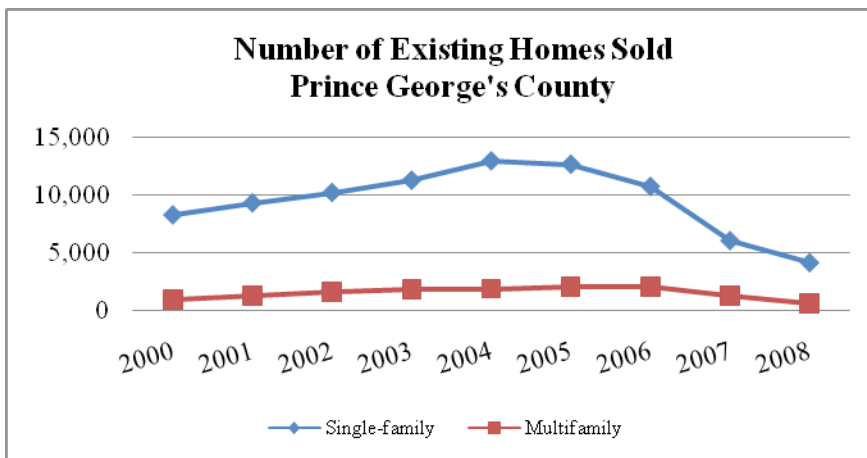
There has been a more significant fall in the number of existing homes sold, which by 2008 was 62 percent lower than in 2006. Most of this decline has been due to fewer sales in the single-family home market (see Chart 3). Condo sales have remained stable relative to the market conditions before the housing boom.

Chart 2



Source: Greater Capital Area Association of Realtors

Chart 3



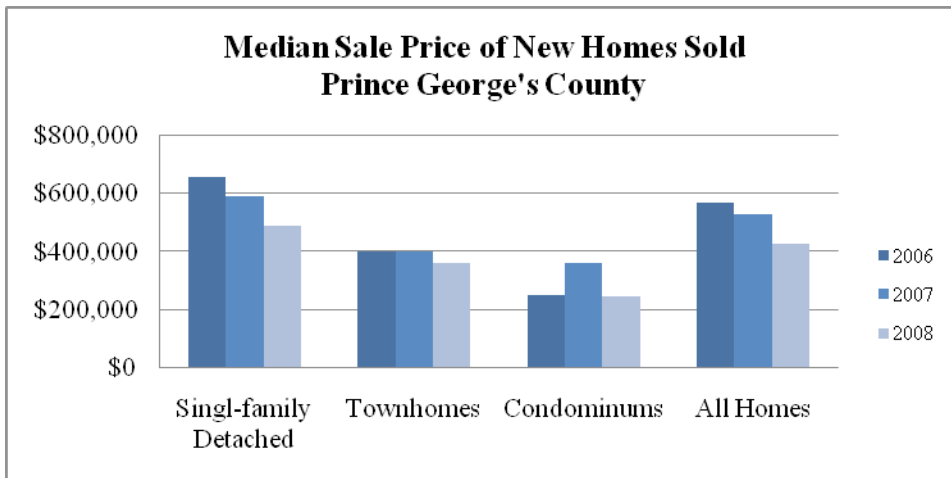
Source: Greater Capital Area Association of Realtors

New Homes Sales

In 2008, the median price of new homes sold in the county was approximately \$424,000. This was a 25 percent decline from 2006, which was largely due to declining sales in the single-family detached home market (see Chart 4). New single-family homes saw a larger drop in sales than existing single-family homes.

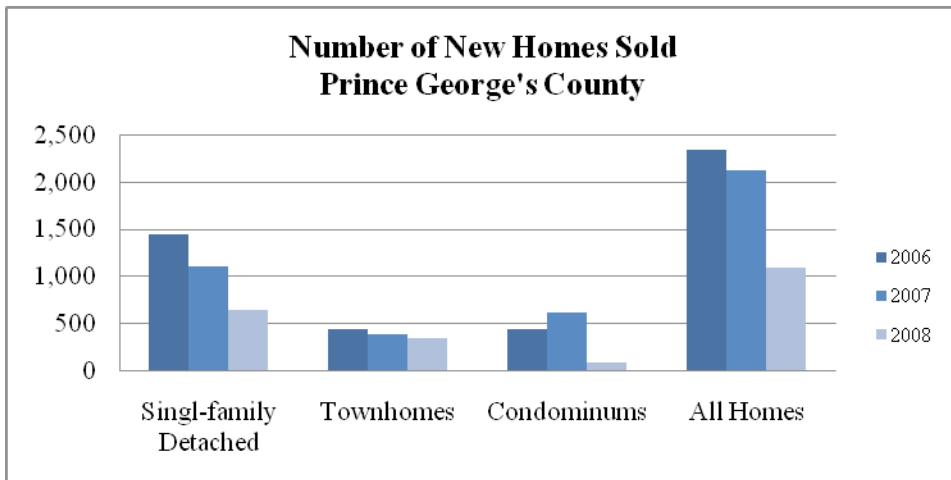
The total number of new homes sold in the county dropped about 53 percent between 2006 and 2008 (see Chart 5). The largest percentage drop in new home sales was in multifamily condominiums (77 percent) and single-family detached houses (55 percent). New townhomes built in the county have not been hit as hard as single-family detached homes. New townhomes have had a smaller decrease in the number of homes sold (22 percent) and in median sales price (10 percent).

Chart 4



Source: Hanley Wood, LLC

Chart 5

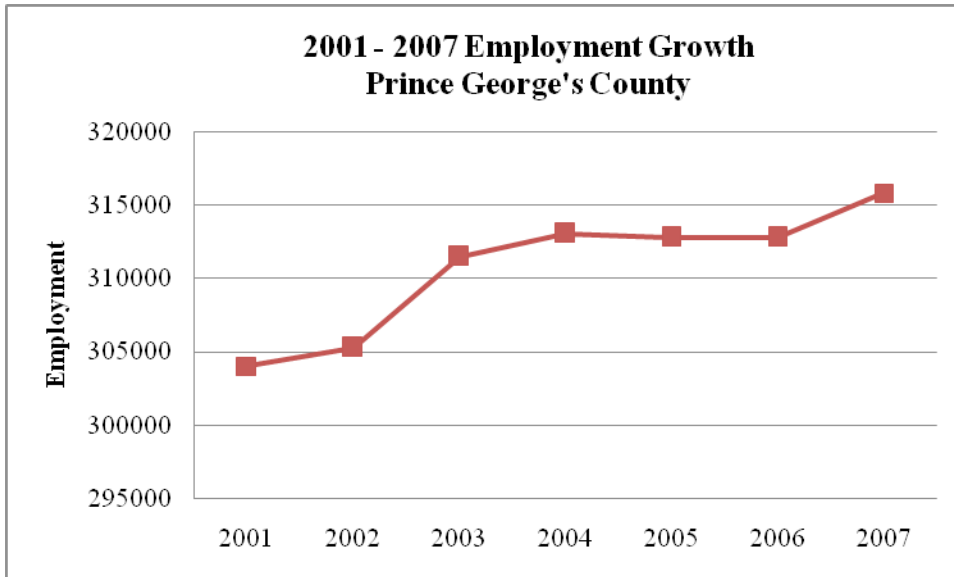


Source: Hanley Wood, LLC

Business Economy

Conditions in the local business economy can affect the demand for new nonresidential construction. Between 2001 and 2007 the county averaged an annual employment growth rate of 1.16 percent. This equates to approximately 1,974 new jobs a year and shows that employment opportunities in the county are steadily growing.

Chart 6



Source: U.S. Bureau of Labor Statistics: *Quarter Census of Employment and Wages*

Major Employers

In 2008, approximately 60 percent of the 25 largest employers in the county were office employers. Many of these employers are federal and include agencies such as the U.S. Internal Revenue Service, the U.S. Census Bureau, and NASA.

Table 4

Top Ten Largest Employers in Prince George's County For 2008		
Employer	Product/Service	Employees
University System of Maryland	Higher Education	15,768
Andrews Air Force Base	Military Installation	15,000
U.S. Internal Revenue Service	Revenue Collection	5,539
United Parcel Service (UPS)	Mail and Package Delivery	4,220
U.S. Census Bureau	Demographic Research	4,158
Giant Food	Groceries	3,609
NASA-Goddard Space Flight Center	Space Research	3,083
Verizon Telecommunications	Telecommunications	2,738
Dimensions Healthcare System	Medical Services	2,500
Safeway Groceries	Groceries	2,400

Source: Prince George's County Economic Development Corporation

Workforce

Prospective employers considering the county as a location for operation will evaluate the local workforce to determine the probability for satisfying job requirements. They will focus on the available workforce and the ratio of skilled to unskilled workers. Table 5 shows the educational level of the 25-year and older population in the county and neighboring jurisdictions. The county has a high share of the population segment that has a high school diploma or less compared to its neighbors. Table 6 gives an indication of the type of job growth the county may see in the next few years based on educational attainment.

Table 5

Educational Attainment of the 25-Year and Older Population			
Jurisdiction	High School Diploma or Less	Post-Secondary/ Associate Degree	Bachelor's Degree or Higher
Montgomery County	37%	6%	57%
Fairfax County	35%	6%	59%
Howard County	39%	6%	56%
District of Columbia	49%	3%	48%
Anne Arundel County	59%	7%	34%
Prince George's County	62%	7%	30%
Calvert County	63%	6%	31%

Source: 2007 American Community Survey

Table 6

Top Five Occupations with Highest Employment Growth Between 2004 and 2014		
High School or Less	Post-Secondary/Associate Degree	Bachelor's Degree or Higher
Retail Salesperson	Registered Nurses	General and Operations Managers
Cashiers	Automotive Technicians/ Mechanics	Computer Systems Analysts
Waiters and Waitresses	Nursing Aides and Orderlies	Elementary School Teachers
Combined Food Preparation	Computer Support Specialists	Management Analysts
Janitors & Cleaners	Real Estate Sales Agents	Network Systems and Data Communications Analysts

Source: Maryland Department of Labor, Licensing and Regulation

Job Growth

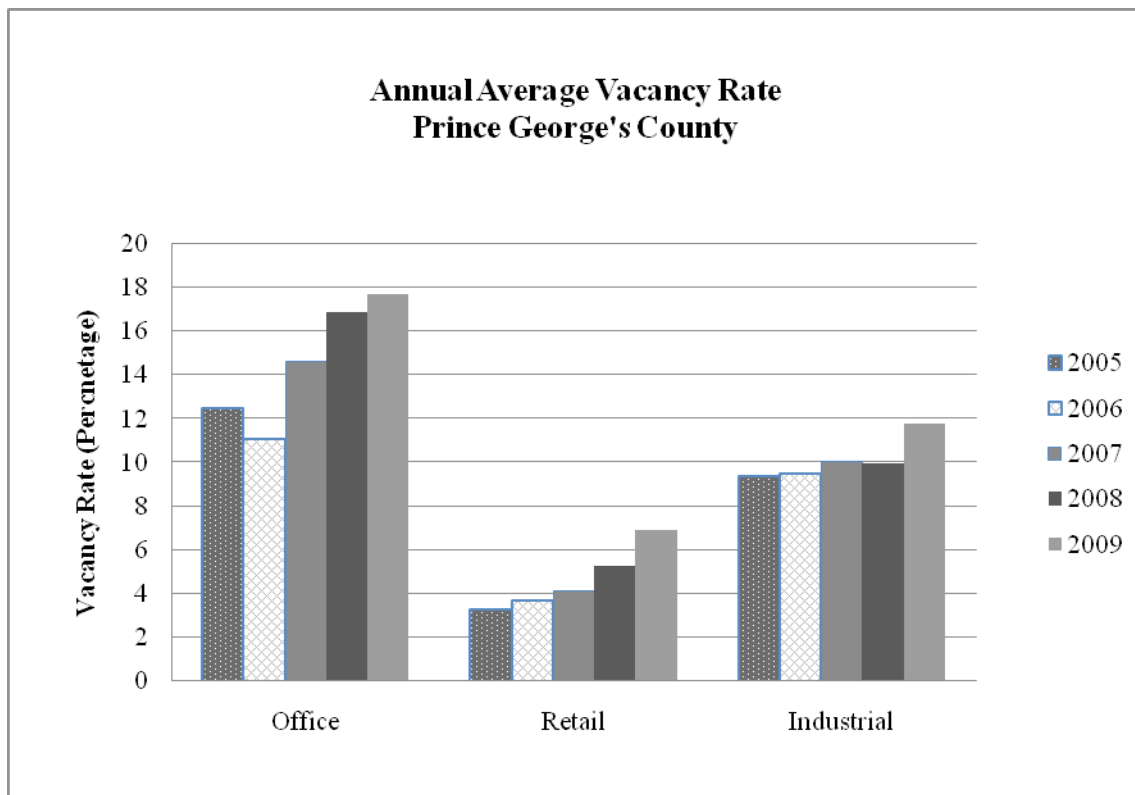
Employment growth in specific industries can help to gauge land use trends for nonresidential development active in future years to come. According to the Maryland Department of Labor, Licensing, and Regulation, the number one occupation in terms of employment growth in the county between 2004 and 2014 is projected to be retail salespersons with 1,180 new jobs during this period. This indicates that a significant amount of new, nonresidential construction over the next few years may be retail. Other top employment growth occupations between these years (such as carpenters, janitors, and security guards) are occupations that are not necessarily land use specific.

Vacancy Rates

Aside from job growth, vacancy rates for commercial properties can help indicate the demand for various types of nonresidential uses. Increasing vacancy rates suggest lower rents and less demand for space relative to locations with smaller vacancy rates. As Chart 7 shows, vacancy rates in the county have been increasing steadily among all structure types since 2005. Rising vacancy rates in the county over the past few years are due mostly to the downturn of the national economy; other jurisdictions in the Washington Metropolitan area are experiencing the same vacancy trends.

Buildings with office uses have the highest vacancy rates in the county. This indicates that there may be less demand for office use when compared to the demand for retail and industrial uses.

Chart 7



Source: CoStar

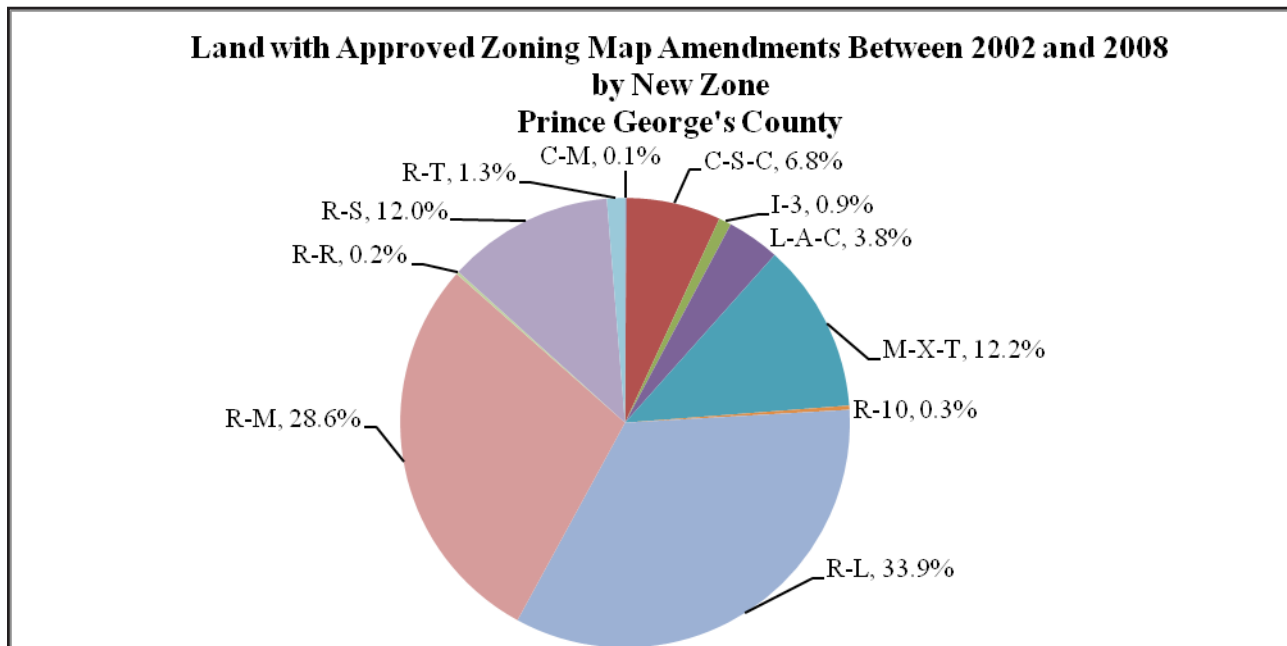
Zoning Map Amendments

Approved applications for zoning map amendments can foreshadow a future land use for new land development in an area when zoning maps have not been updated. Over the past five years, a majority of these approved applications in the county requested a change to a residential zone. This may be an indication of there being a greater demand for, or feasibility in, developing residential uses in the county as opposed to commercial uses. Mostly all of this rezoning was in the county's Developed Tier, which is a policy area in the county characterized by low- to moderate-density suburban residential communities.

Zoning changes occurring through zoning map amendments between 2002 and 2008 provide an indication of where major growth in the county is expected to occur (see Map 1 on page 10). This includes retail development at Brandywine Crossing and Ritchie Station Market Place; mixed-use development at Woodmore Town Center; and residential development at Bevard East and Smith Home Farms (Westphalia).

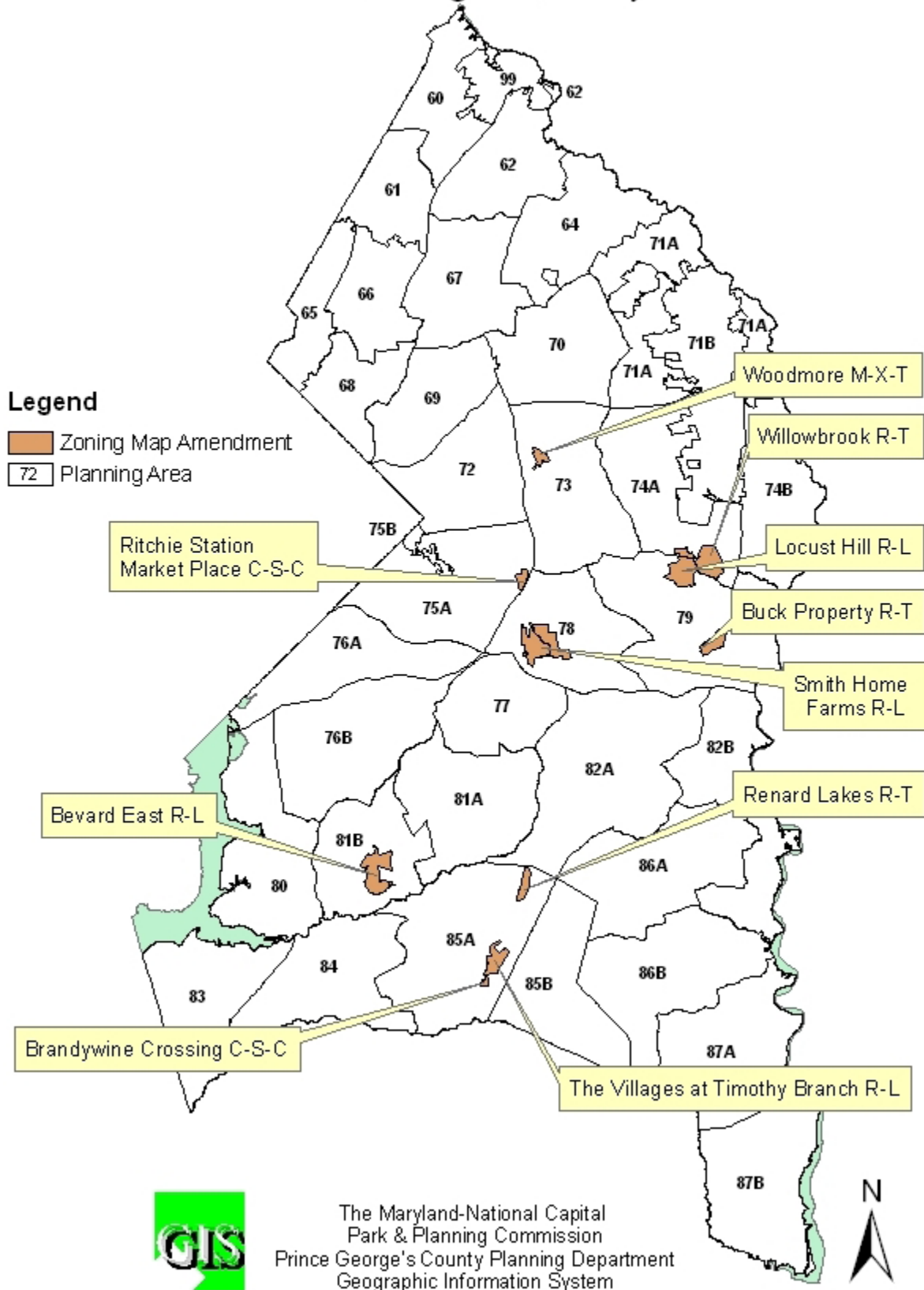
Over the past five years, 75 percent of land rezoned through zoning map amendments was in the residential comprehensive design zones R-L, R-M, and R-S (see Chart 8). Comprehensive design zones differ from others (residential, commercial, industrial, and mixed-use) in that they require a three-phase development plan review and provide for ranges in intensity and density of development in return for public benefit features provided by the developer. The flexibility of residential comprehensive zones may be one of the reasons why a majority of land rezoned between these years was from standard, low-density, residential zones, particularly R-E and R-A. For a definition of zones, see Appendix A2.

Chart 8



Source: M-NCPPC Development Activity Monitoring System

Approved Zoning Map Amendments (2002-2008) Prince George's County



New Building Construction

Residential Building Completions Highlights

In recent years there has been a resurgence of multifamily development in the county with new projects such as Midtown Largo Station and One National Harbor, in close proximity to the Capital Beltway. As illustrated in Table 7, the largest residential developments built in the county during 2008 were multifamily developments. Current multifamily construction in the county differs from that in the past by being midrise in structure, versus garden-style variety. More and more multifamily projects in the county are marketed as condominiums versus rental and are most likely zoned for mixed-use.

Most of the largest single-family subdivisions built in the county during 2008 consisted of townhomes. All of the largest single-family projects were built under comprehensive design zones, which can allow for a greater mixture of residential types, lot sizes, and limited commercial uses necessary to serve the dominant residential use.

Map 2 shows that most new units built in 2008 were located in the central portion of the county in communities such as Largo, Mitchellville, Westphalia, Bowie, and Upper Marlboro. While new dwelling unit construction was scattered throughout the county, most of the largest residential projects built in 2008 were located at or within the Capital Beltway (see Map 3).

Table 7

Ten Largest New Residential Projects Built in 2008					
Subdivision	Number Of Dwelling Units	Unit Type	Planning Area	Location	Zoning
Midtown Largo Station Condo	242	MF	73	Largo	M-U-I
One National Harbor Condo	242	MF	80	National Harbor	M-X-T
Oak Creek Club	134	71 TH, 63 SF	74A	Upper Marlboro	R-L
Tribeca At Camp Springs	127	MF	76A	Suitland	C-S-C
One Independence Plaza	112	MF	68	Hyattsville	M-X-T
Summerfield	81	TH	72	Landover	R-L, L-A-C
Arts District Hyattsville	69	TH	68	Hyattsville	M-U-I
Watkins Place	64	TH	73	Largo	R-M
Beech Tree	63	SF	79	Upper Marlboro	R-S
Chelsea West	60	MF	76A	Suitland	M-X-T

Source: Maryland Tax Assessor File



Multifamily development with retail on lower level at Trebeca at Camp Springs



Gateway Arts District Hyattsville



Typical single-family home at Beech Tree

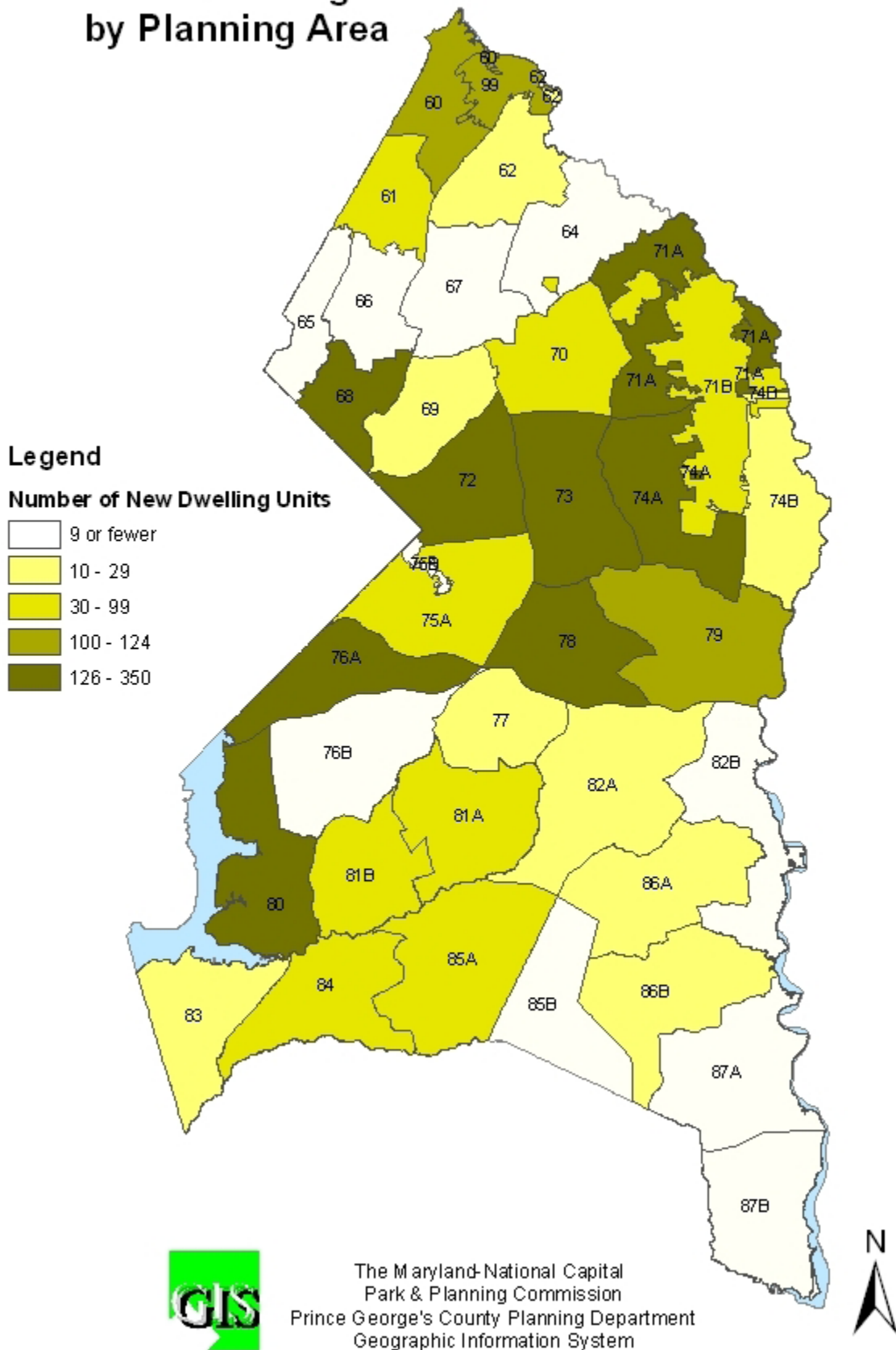


Midtown Largo Station Condos

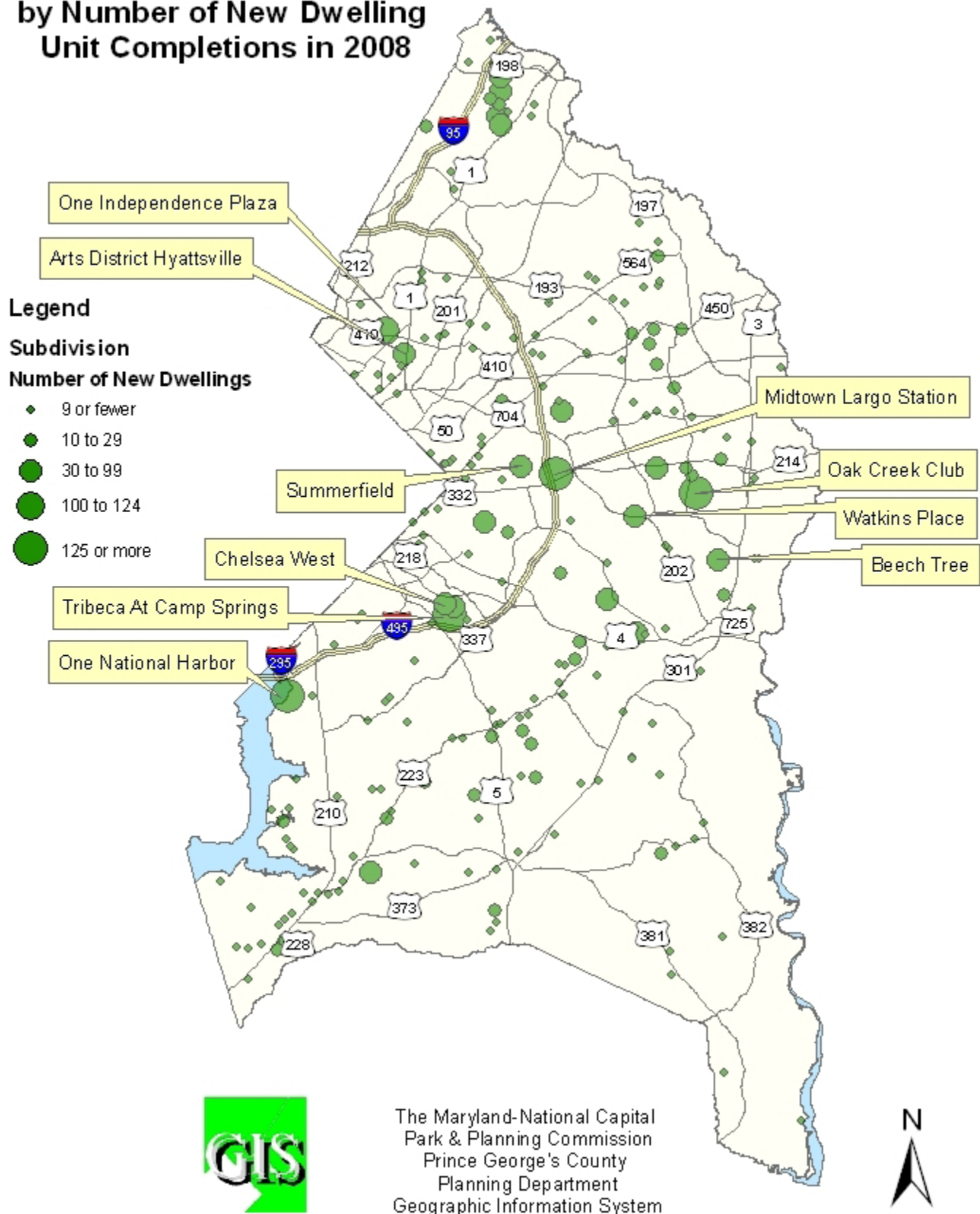


Townhomes at Watkins Place

2008 New Dwelling Units by Planning Area



Residential Subdivisions by Number of New Dwelling Unit Completions in 2008



New Nonresidential Completions Highlights

Table 8

2008 New Non-Residential Construction by Zoning and Land Use					
ZONE	Square Feet of Development by Land Use				
	Hotel	Industrial	Office	Retail	Grand Total
C-2				11,448	11,448
C-M	63,499	13,200			76,699
C-S-C		70,088	3,468	318,934	392,490
E-I-A			57,080		57,080
I-1		396,034		6,782	402,816
I-2		26,998			26,998
I-3		99,512	124,027	14,808	238,347
I-4		3,200			3,200
M-U-I				26,065	26,065
M-X-T	2,668,658		166,720	3,552	2,838,930
R-80				14,452	14,452
U-L-I		148,602			148,602
Grand Total	2,732,157	757,634	351,295	396,041	4,237,127

Source: Maryland Tax Assessor File

Table 9

2008 Top Ten Largest New Nonresidential Building Completions		
Project	Square Feet	Planning Area
National Harbor	2,668,658	80
Brandywine	283,027	85A
The Brick Yard	266,232	62
Penn-East Business Park	225,600	78
Melford	166,720	71B
EZ Storage	148,602	68
Washington Business Park	82,500	70
Auth Road Center	70,088	76A
Holiday Inn	63,499	81A
Konterra Business Campus	57,080	60

Source: Maryland Tax Assessor File

In 2008, nonresidential construction in Prince George’s County covered approximately five million square feet. Of this total, 85 percent was new construction. The remaining 15 percent consisted of additions or property conversions.

Most of the new nonresidential building completions in the county during 2008 (51 percent) provide for retail uses. Still, as shown in Table 8, two-thirds of total new nonresidential space was developed for hotel and accommodation uses. The large quantity of hotel space built in the county in 2008 was due to a number of luxury hotels constructed at National Harbor.

The zoning category having the highest share of total new nonresidential development (67 percent) was M-X-T (mixed-use). This was also a result of development at National Harbor.

The I-1 and C-S-C Zones were second in total share of development activity; each had a nine percent share of total new nonresidential space constructed. The C-S-C Zone provides for retail and commercial service activities generally located within shopping centers. The I-1 Zone supports light intensity manufacturing, warehousing, and distribution uses.

The following pages provide more detail on new nonresidential projects where construction took place in the county during 2008.



New development at The Brick Yard

National Harbor

National Harbor sits along the banks of the Potomac River and is currently one of the largest development projects on the East Coast. The project site consists of 300 acres, which is anticipated to support one million square feet of retail, dining, and entertainment space. The project includes five hotels accommodating 4,000 rooms, 160,000 square feet of class “A” office space and numerous marinas and piers. National Harbor is currently one of the most significant development projects in Prince George’s County. It is already attracting travelers along I-95 and with Gaylord National, the largest combined hotel and convention center on the east coast with 470,000 square feet of meeting space and 2,000 guestrooms, it is bringing conventions to the county, and providing local residents with an attractive retail, dining, and entertainment destination.

Brandywine Crossing

In 2008, Phase I of Brandywine Crossing was completed just south of US 301/MD 5 and Chadds Ford Road in Brandywine, Maryland. Upon completion of Phase II the shopping center will consist of approximately 800,000 square feet of retail, office and flex space. Brandywine Crossing has been designed as pedestrian-friendly development with a variety of retail and dining options, along with big box stores. Recently Target, Costco, and Safeway have opened their doors at the shopping center. Development at Brandywine Crossing has the capability to attract residents from the steadily growing population of neighboring Charles County while providing more retail options for residents in the southern portion of Prince George’s County. Brandywine Crossing was recently recognized by Maryland’s prestigious *The Daily Record* as “Southern Maryland’s Top Commercial Project” in 2008.

The Brick Yard

The Brick Yard is an office and warehouse/production development north of the Capital Beltway along US 1. The 65-acre site is expected to accommodate 700,000 square feet of office (30 percent) and warehouse/production (70 percent). New class “A” flex and industrial space constructed here will be the first in northern Prince George’s County in approximately six years. The Brick Yard project offers a unique business opportunity for companies looking to locate near Fort Meade, the new Federal Drug Administration Center, transportation links of I-95, the Inter-County Connector, or a MARC train station.



Target opens at Brandywine Crossing



First phase of National Harbor opens to the public

Penn East Business Park

Penn East Business Park is located along MD 4, just outside the Capital Beltway. It is a flex industrial site that occupies two buildings. Currently, Capital Lighting occupies a 200,000-square-foot building, while the Mid-Atlantic Regional Council of Carpenters utilizes a 60,000-square-foot facility. The vision put forth by the developer is for more businesses similar to Capital Lighting to occupy the site. Three buildings totaling 150,000 square feet together are planned for the future development. A search for new tenants for those buildings is underway.

Melford (Formally Known as University of Maryland Science & Technology Center)

Melford is a 466-acre, mixed-use development site in Bowie, on the northeast quadrant of the US 301 and US 50 interchange. At final buildout Melford will contain nearly three million square feet of office and R&D/flex space; approximately 200,000 square feet of retail space; and a full-service hotel. The park will feature amenities including retail stores, shops and, restaurants. Strategically located between Annapolis, Washington, D.C., and Baltimore, this project offers a superior infrastructure system and is surrounded by a large and highly-educated work force. Some of the major tenants include the U.S. Census Bureau, National Oceanic and Atmospheric Administration, Institute for Defense Analysis, and the International Union of Bricklayers. Currently, Melford is the number two tax payer in the City of Bowie and in the top ten for the county.

Konterra Business Campus

The Konterra Business Campus is set in a mature landscape with strong infrastructure. Access to the campus is provided directly by US 1, a five-minute drive from I-95, and is serviced by a station on the commuter rail connection between Baltimore and Washington. The campus provides choice office and flex spaces, and employs a diverse and skilled work force. Prior to 2008, the campus was already offering approximately 550,000 square feet of space.

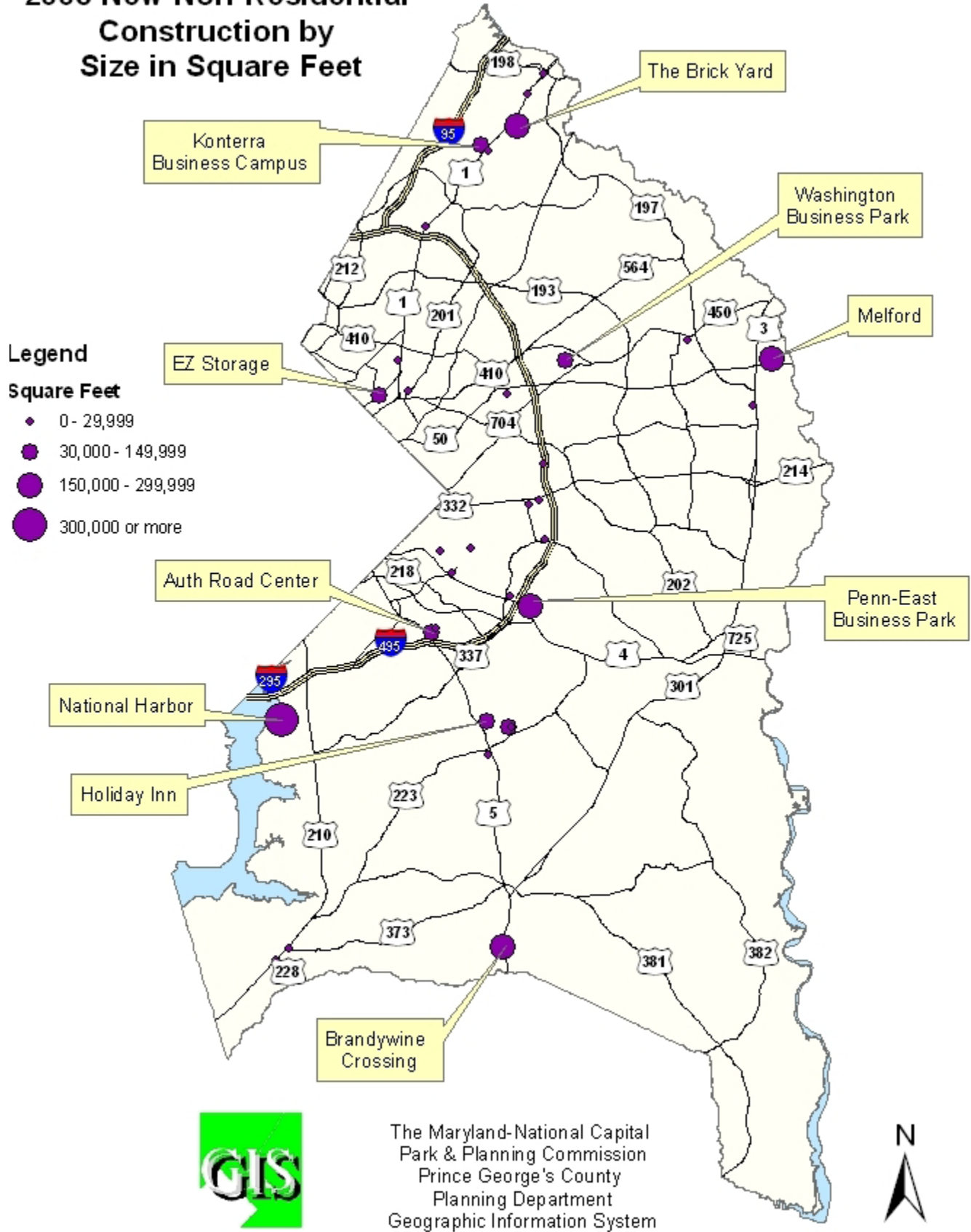


Office building at Konterra Business Center



Office development at Melford

2008 New Non-Residential Construction by Size in Square Feet



Development Activity Trends

Development Tier Trends

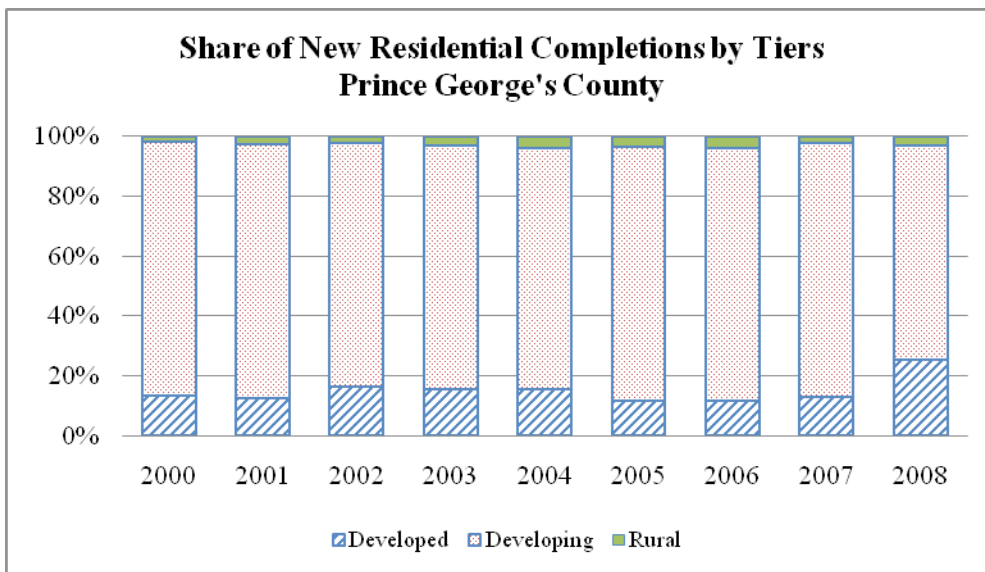
The Prince George's County Approved General Plan designates three policy tiers (the Developed Tier, the Developing Tier, and the Rural Tier) to guide the development pattern and future growth of the county. Each tier is characterized by the intensity of residential and commercial development (see Map 5).

The Developed Tier consists of stretches of commercial-strip properties, multifamily areas, and older single-family neighborhoods. This tier also has the least amount of developable land based on current zoning. The General Plan envisions this tier as being a network of sustainable, transit-supporting, mixed-used, pedestrian-oriented, and medium- to high-density neighborhoods. In 2008 25 percent of new residential construction in the county was located in the Developed Tier (see Chart 9). Fifty-two percent of new residential development in the Developed Tier was multifamily development.

The Developing Tier is characterized by a pattern of single-family, low- to moderate-density, suburban residential communities, distinct commercial centers, and employment areas that are increasingly accessible to transit services. Seventy-two percent of new residential development occurring in the county during 2008 was in the Developing Tier. The Developing Tier has had a majority of the county's new residential growth in recent years.

New development in the Rural Tier is less frequent relative to development occurring in the other two tiers. In 2008, only three percent of all new residential construction took place in the Rural Tier. Less growth in this tier is a result of current policies that limit nonagricultural land use in the Rural Tier in order to preserve its environmentally sensitive features and maintain its rural character.

Chart 9








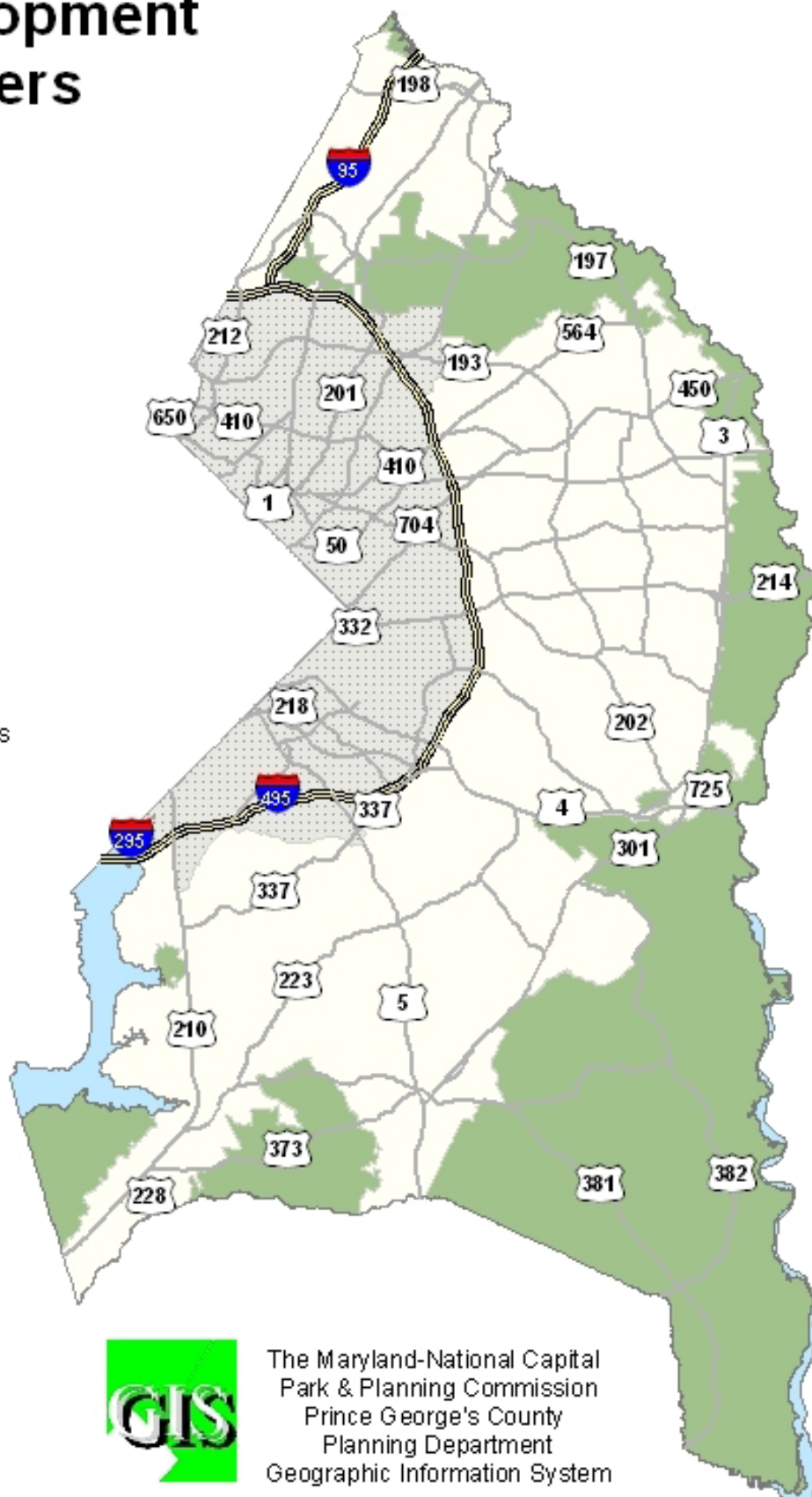
Source: Maryland Tax Assessor File; M-NCPPC

Development Tiers

Legend

Tier

-  Developed
-  Developing
-  Rural
-  Major Roads
-  Interstate



The Maryland-National Capital
Park & Planning Commission
Prince George's County
Planning Department
Geographic Information System



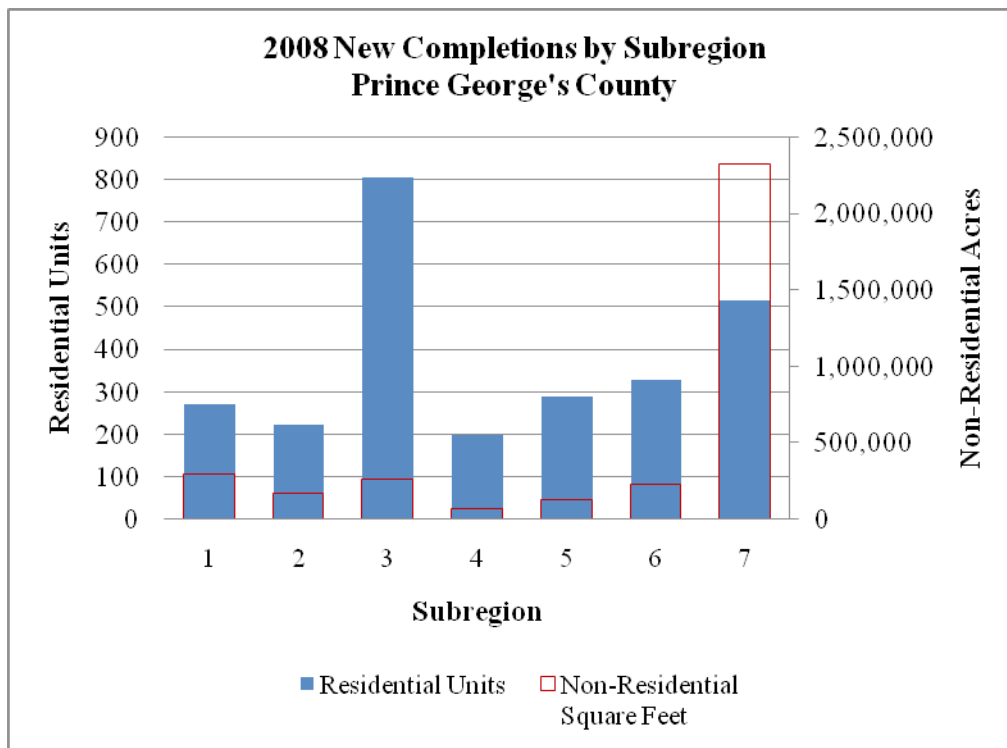
Subregion Trends

Subregions are large regions in the county consisting of groups of adjacent planning areas that may share similar community characteristics (see Map 6). Planning areas typically have a radius of approximately three miles and are formed by major physical boundaries or barriers (major roads, right-of-way, streams, etc). Looking at development trends by subregion helps identify trends that may be unique to specific areas in the county possessing certain social, economic, or physical characteristics.

As Chart 10 illustrates, most residential growth occurred in Subregion 3, which is in the eastern portion of the county consisting of the Bowie, Largo, Glenarden, Kettering, and Mitchellville communities. It is not surprising that Subregion 3 had the most growth considering that a majority of its land area lies in the Developing Tier (unlike Subregions 2, 4, and 6), it is almost twice the size of Subregion 1, and it is more conveniently located between Washington D.C., Annapolis, and Baltimore than Subregions 5 and 7.



Nonresidential growth in Subregion 7 surpassed nonresidential growth in the remainder of the county during 2008 with 2.2 million square feet of construction. It was the only area of the county where nonresidential construction exceeded residential development activity. Approximately 97 percent of this nonresidential growth was due to developments at National Harbor.

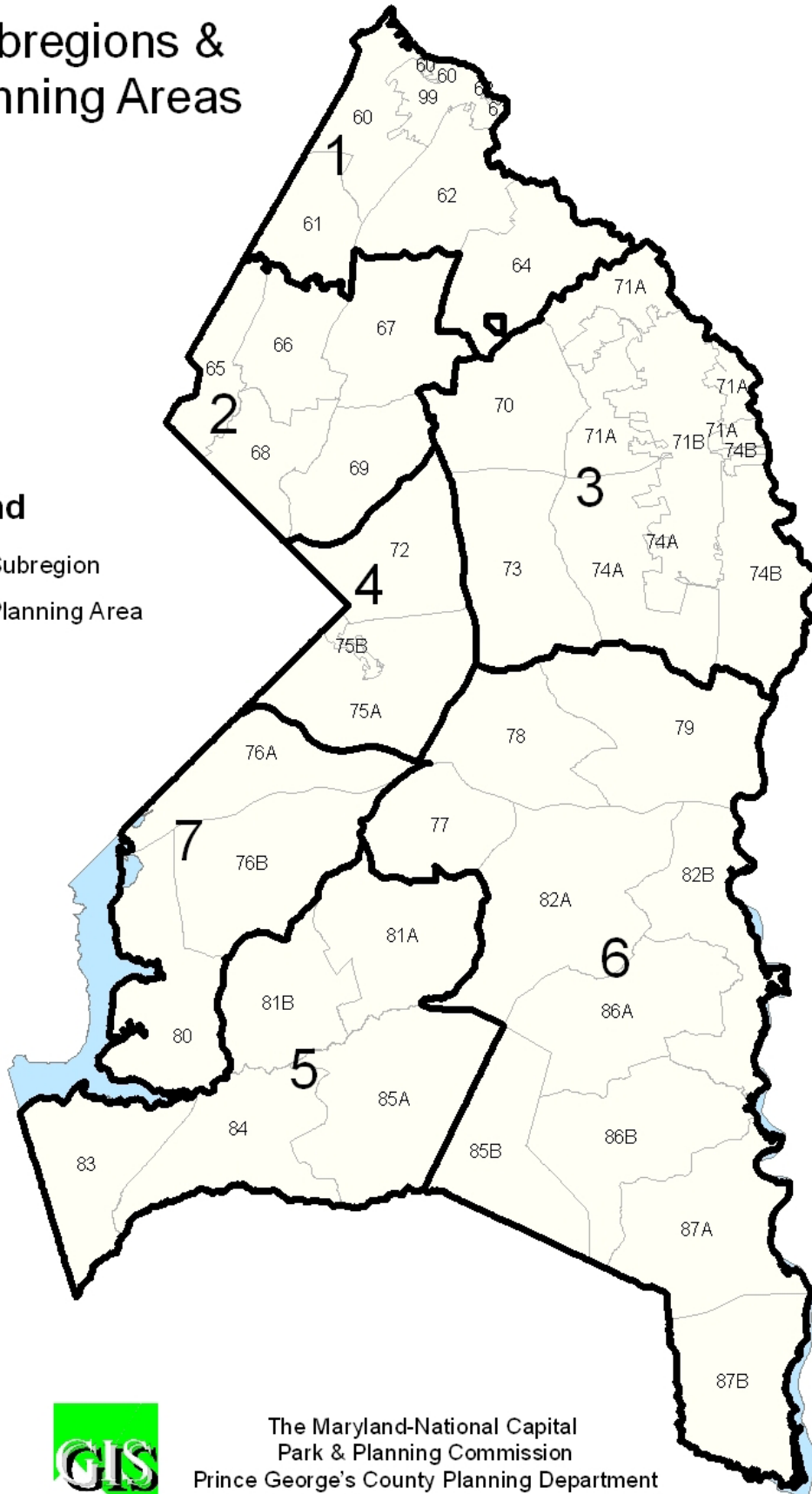
Chart 10



Subregions & Planning Areas

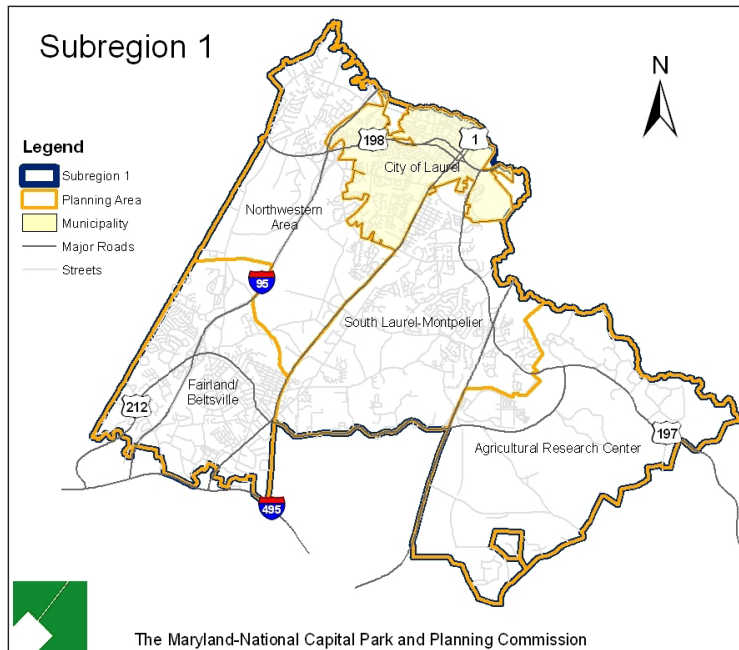
Legend

-  Subregion
-  Planning Area



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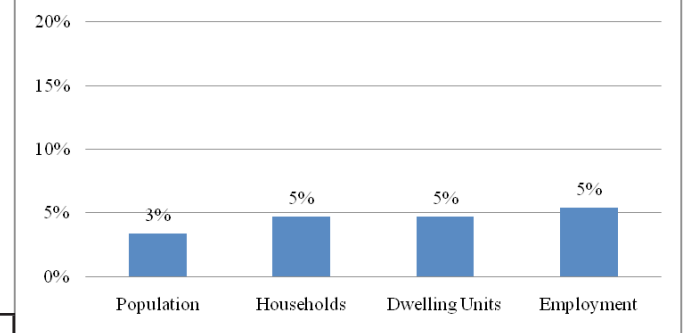




Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	75,555	79,576	82,239
Households	30,619	32,764	34,301
Dwelling Units	32,105	34,407	36,017
Employment	58,642	60,098	63,355

Forecasted Growth (2010 - 2015) Subregion 1



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	136	11	5,768
Single-family Detached	136	11	54
Single-family Attached	0	0	1,114
Multifamily Units	0	0	4,600
Nonresidential Acres	41	49	16

New Completions

	2006	2007	2008
Total Residential Units	546	741	273
Single-family Detached	279	197	161
Single-family Attached	69	49	63
Multifamily Units	198	495	49
Nonresidential Square Feet	92,220	163,823	292,067

2008 Major Approved Pipeline Projects

Konterra Town Center—3,740 multifamily units, 760 townhomes
 The Brick Yard—860 multifamily units, 354 townhomes, 51 single-family units

2003–2008 Rezonings

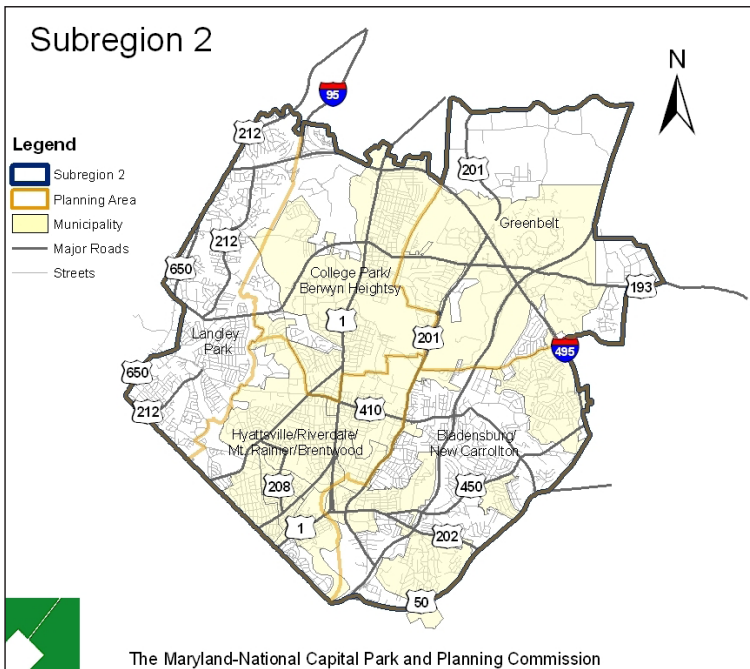
22.8 acres rezoned for office use
 3.71 acres rezoned to retail

In recent years, residential construction in Subregion 1 has been steadily growing with luxury single-family homes and specialized communities that promote active and healthy living for older adults.

The largest residential growth in Subregion 1 was at The Villages of Wellington (part of the larger Konterra project) and Victoria Falls, a 55+ community.

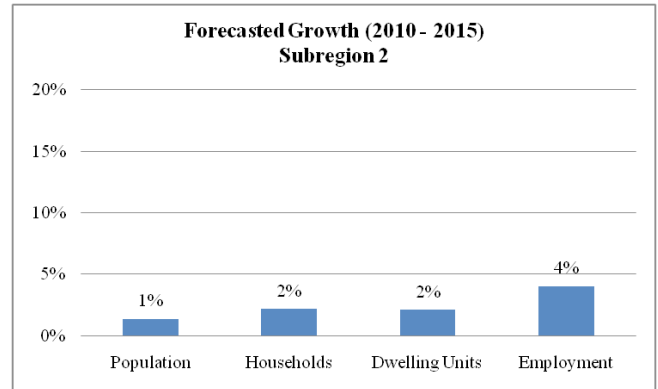
Most nonresidential construction in Subregion 1 during 2008 has been developed for employment or industrial land uses. Approximately 230,000 square feet of industrial and flex space construction occurred at The Brick Yard site.

Continued development at the Konterra and The Brick Yard sites will be the major source of population and employment growth for the subregion for years to come.



Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	228,306	231,787	234,945
Households	79,808	82,164	83,953
Dwelling Units	84,335	86,823	88,640
Employment	101,398	105,784	110,047



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	2,703	62	1,449
Single-family Detached	251	0	63
Single-family Attached	556	0	606
Multifamily Units	1,896	62	780
Nonresidential Acres	108	75	32

New Completions

	2006	2007	2008
Total Residential Units	67	105	225
Single-family Detached	25	73	44
Single-family Attached	24	16	69
Multifamily Units	18	16	112
Nonresidential Square Feet	91,602	78,652	166,714

2008 Major Approved Pipeline Projects

- University View—506 multifamily units
- Gateway Arts District Hyattsville—195 townhomes, 4 single-family units
- College Park Student Housing—274 multifamily units

2003–2008 Rezonings

- 8.71 acres rezoned to residential
- 4.14 acres rezoned for mixed use

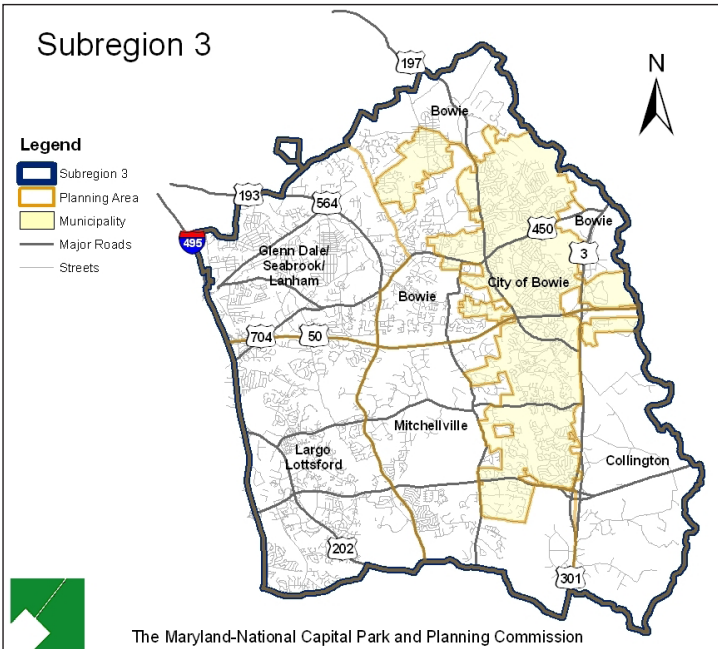
Subregion 2 sits predominantly in the Developed Tier of the county and is urban in its physical character. It is home to some of the oldest communities in the county, such as Mount Rainier, Brentwood, Bladensburg, and parts of Greenbelt.

Subregion 2 is a melting pot containing various ethnic and age groups. The presence of the University of Maryland College Park and several Metro stations offers a catalyst for growth through redevelopment in the area.

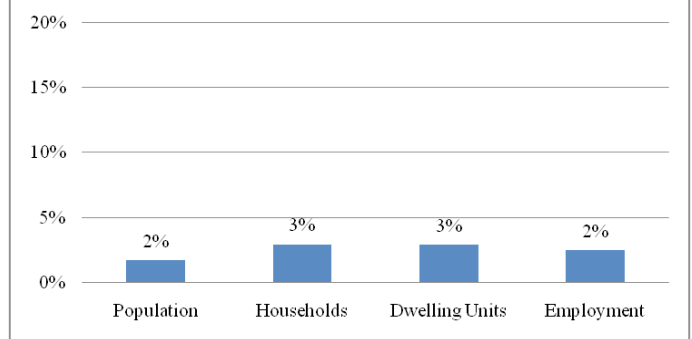
Redevelopment has already begun in Hyattsville and just a few miles from the university. Residential projects built in 2008, such as EYA/Hyattsville Arts District and One Independence Plaza, are helping to restore vibrancy and a sense of place to the Hyattsville and College Park areas.

Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	160,710	167,821	170,686
Households	56,815	59,949	61,699
Dwelling Units	58,622	61,834	63,617
Employment	51,128	55,147	56,516



Forecasted Growth (2010 - 2015)
Subregion 3



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	2,937	540	660
Single-family Detached	1,444	530	151
Single-family Attached	711	10	239
Multifamily Units	782	0	270
Nonresidential Acres	515	53	184

Subregion 3 is suburban in character. Its proximity and access to Washington D.C., Annapolis, and Baltimore has enabled this section of the county to become one of the most popular destinations for homebuyers.

Recently, large resort-style subdivisions such as Beechtree, Fairwood and, Oak Creek Club have developed here, but due to the national downturn in the housing market, there has been a slowdown in construction and sales.

New nonresidential development in this region during 2008 was dominated by the construction of a 166,720-square-foot class A office building at the Melford site.

New Completions

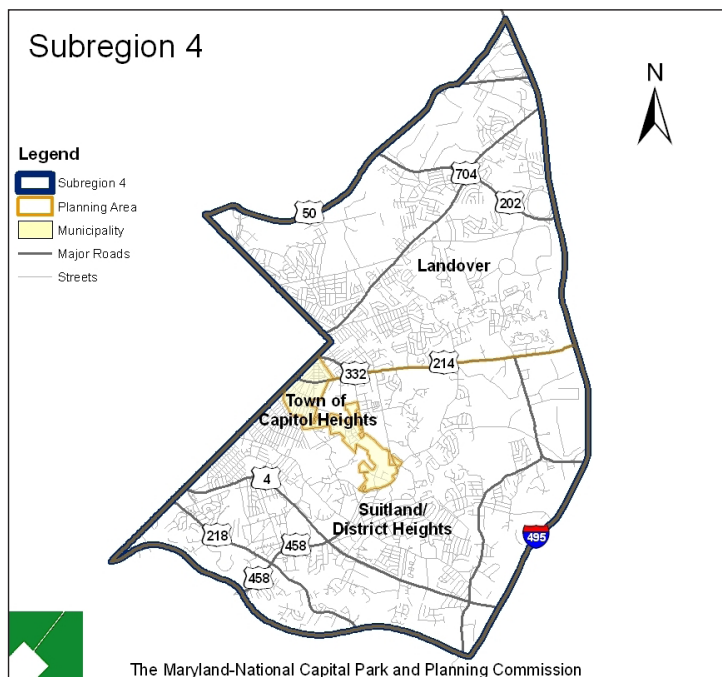
	2006	2007	2008
Total Residential Units	953	1,100	807
Single-family Detached	523	980	369
Single-family Attached	227	48	172
Multifamily Units	203	72	266
Nonresidential Square Feet	721,254	269,981	264,028

2008 Major Approved Pipeline Projects

The Enclave at Beechfield—200 multifamily units, 200 townhomes
Hall Station—70 multifamily units, 30 townhomes

2003–2008 Rezoning

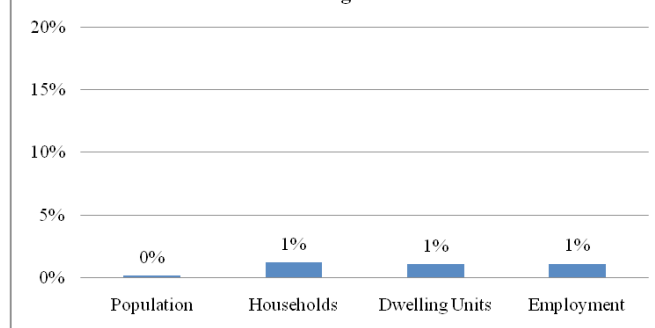
5.99 acres rezoned for office use
273.11 acres rezoned to mixed use



Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	123,114	122,040	122,226
Households	44,530	44,537	45,085
Dwelling Units	48,390	48,380	48,899
Employment	54,056	54,682	55,290

Forecasted Growth (2010 - 2015) Subregion 4



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	680	150	254
Single-family Detached	126	107	58
Single-family Attached	454	43	196
Multifamily Units	100	0	0
Nonresidential Acres	200	368	98

New Completions

	2006	2007	2008
Total Residential Units	128	494	200
Single-family Detached	34	84	64
Single-family Attached	32	119	92
Multifamily Units	62	291	44
Nonresidential Square Feet	138,406	421,134	63,332

2008 Major Approved Pipeline Projects

Addison Road South—196 townhomes

Steeplechase—52.07 acres

2003–2008 Rezoning

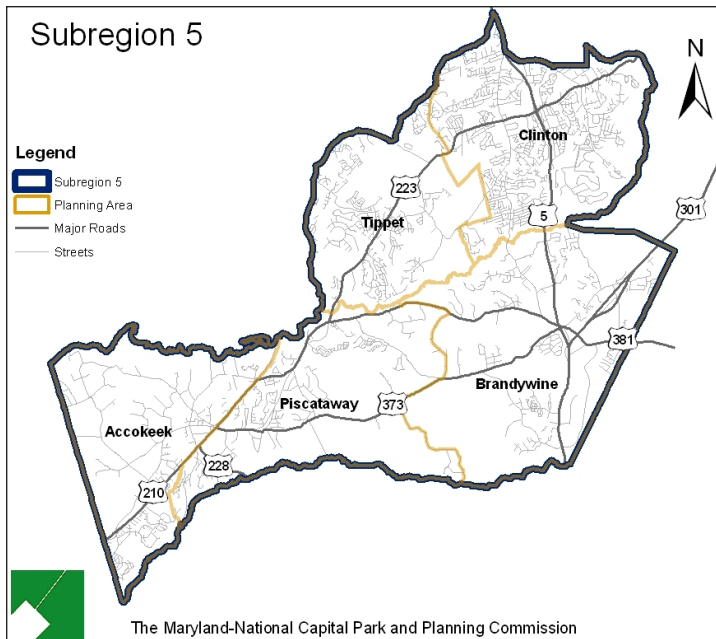
34.38 acres rezoned to mixed use

117.87 acres rezoned for retail use

Subregion 4 sits entirely in the Developed Tier bordering Washington, D.C. It consists of older communities containing an even mix of rental and owner-occupied housing units. Due to limited developable land, Subregion 4 had the least residential construction in 2008.

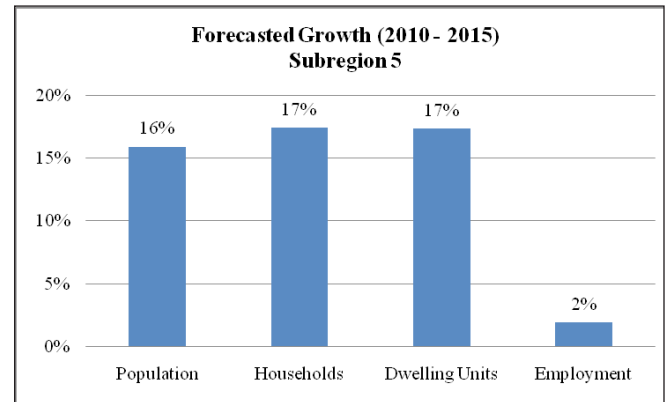
Most new residential construction in Subregion 4 took place within a mile of a Metro station. The largest residential project that occurred in this area was Summerfield, with 81 new townhomes built adjacent to the Morgan Boulevard Metro Station. Another project, The Addison at St. Paul, consisted of 44 new multifamily units built a few miles from the Addison Road Metro.

Subregion 4 had the least amount of new nonresidential development activity in 2008. Construction at Forestville Business Park and of the Silver Hill Shopping Center contributed to a total of 63,000 square feet of new development occurring in the subregion. Future non-residential development in Subregion 4 is expected to grow in the future with the completion of Steeplechase, a 108-acre, mixed-use business park that will incorporate restaurants, banks, and other services for employers locating there.



Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	54,626	59,087	68,484
Households	18,602	20,345	23,886
Dwelling Units	19,310	21,117	24,777
Employment	17,997	18,332	18,682



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	1,843	3,223	893
Single-family Detached	1,843	3,037	526
Single-family Attached	0	169	367
Multifamily Units	0	17	0
Nonresidential Acres	106	70	160

New Completions

	2006	2007	2008
Total Residential Units	522	568	310
Single-family Detached	506	567	279
Single-family Attached	16	1	31
Multifamily Units	0	0	0
Nonresidential Square Feet	n/a	4,111	125,337

2008 Major Approved Pipeline Projects

Bevard—367 townhomes, 357 single-family units
 Brandywine Crossing—31.29 acres
 Brandywine 301 Industrial Park—53.97 acres

2003–2008 Rezonings

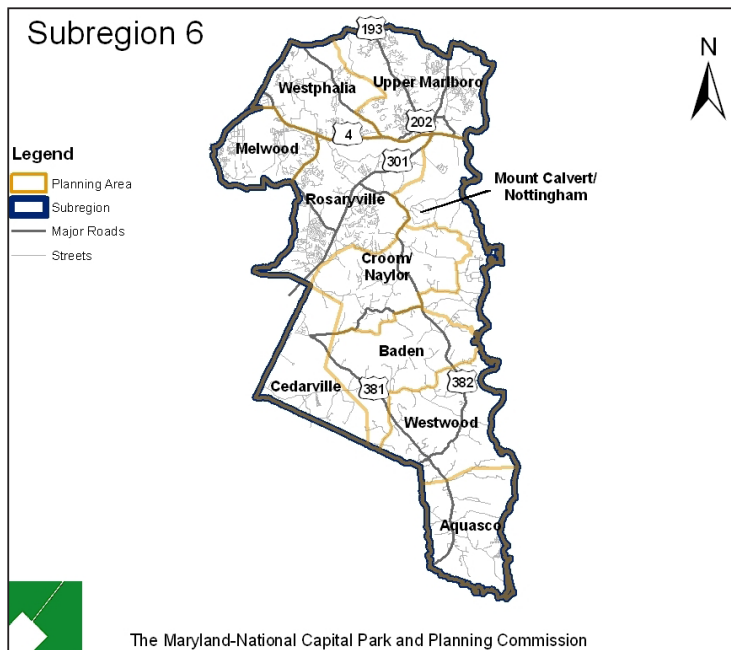
941.24 acres rezoned to residential
 84.77 acres zoned for mixed use
 82.97 rezoned to retail

Subregion 5 is in both the Developing and Rural Tiers. Being positioned several miles from major interstates, Metro stations and Washington D.C.; the southern communities in the county have developed into mostly large suburban neighborhoods served by a number of neighborhood and community retail shopping centers.

During 2008, most residential subdivisions with 20 or more new residential units built occurred within a few miles of Branch Avenue.

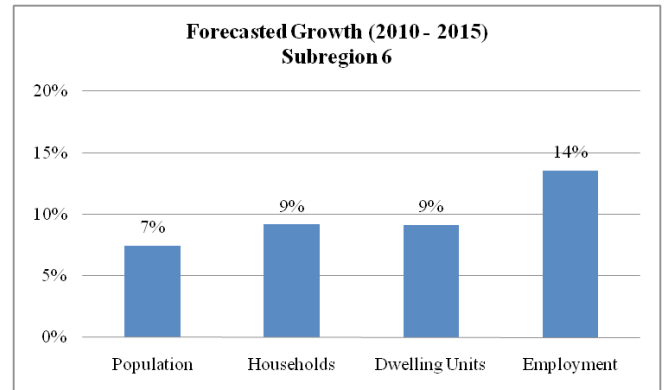
Residential construction was moderate in this subregion when compared to others in the county. But, growth in the number of single-family homes here—with pipeline projects such as Bevard—can be expected to surpass all single-family home growth in other parts of the county in future years.

Nonresidential development in 2008 was dominated by the construction of anchor stores (Target and Costco) for the semi-completed shopping center and Brandywine Crossing, located on US 301. Together the two anchors added over 275,000 square of retail to this region.



Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	65,085	68,605	73,723
Households	22,084	23,612	25,782
Dwelling Units	23,012	24,602	26,849
Employment	27,535	28,268	32,101



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	2,452	713	566
Single-family Detached	1,114	707	324
Single-family Attached	933	6	242
Multifamily Units	405	0	0
Nonresidential Acres	88	70	66

Subregion 6 is home to various communities in the Developing and Rural Tier. Most of the subregion west of US 301 is in the Developing Tier. Residential areas in the Developing Tier are generally developed at low to medium densities and are suburban in character.

New Completions

	2006	2007	2008
Total Residential Units	390	514	328
Single-family Detached	362	453	300
Single-family Attached	28	61	28
Multifamily Units	0	0	0
Nonresidential Square Feet	60,000	17,440	225,600

Three-fourths of the residential development in Subregion 6 occurred at the subdivisions, Marlboro Ridge and Marlboro Pointe. Both subdivisions are part of a larger development project known as Westphalia.

Despite the recent economic downturn and the credit crunch, developers are pursuing a plan to build approximately 15,000 homes and about 6 million square feet of retail and commercial space at the Westphalia site, north of MD 4.

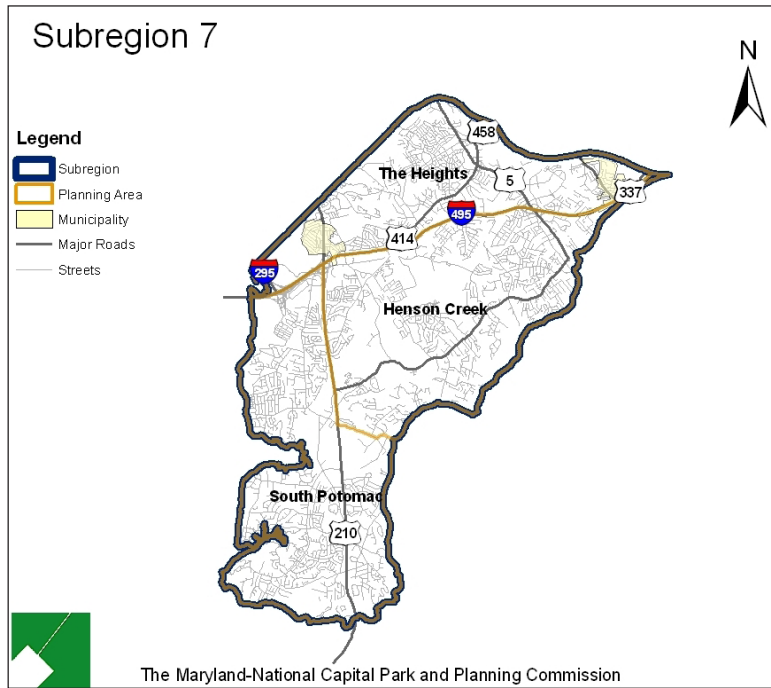
2008 Major Approved Pipeline Projects

Marlboro Ridge—77 townhouses; 64 single-family units
 Marlboro Pointe—101 single-family units
 Forest Hills—112 single-family units

Westphalia is anticipated to absorb most of the future growth generated at neighboring Andrews Air Force Base. A portion of this increase (400 positions) is related to Base Realignment and Closure (BRAC) and is expected by 2011. The remainder (2,300 jobs) is related to Department of Defense reassignments to be completed by 2018.

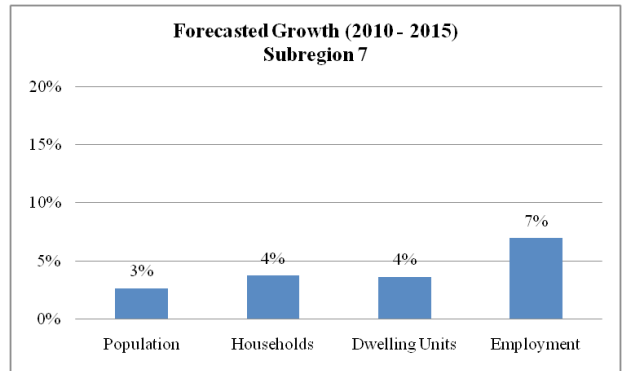
2003–2008 Rezonings

1,270 acres zoned for residential use
 30 acres zoned to mixed use
 9 acres zoned for retail use



Round 7.2A Cooperative Forecast

	2005	2010	2015
Population	141,937	143,098	146,889
Households	53,556	54,510	56,537
Dwelling Units	57,252	58,260	60,374
Employment	37,129	40,575	43,402



Approved Subdivision Cases

	2006	2007	2008
Total Residential Units	381	369	76
Single-family Detached	275	340	76
Single-family Attached	16	29	0
Multifamily Units	90	0	0
Nonresidential Acres	192	24	14

In 2008, Subregion 7 had the second largest share of new residential construction in the county. This was because of heavy multifamily construction concentrated in dense development projects along the Capital Beltway. Town Center at Camp Springs and National Harbor were the major projects making up 82 percent of new residential development in the subregion during this period.

New Completions

	2006	2007	2008
Total Residential Units	296	515	498
Single-family Detached	170	126	25
Single-family Attached	90	52	44
Multifamily Units	36	337	429
Nonresidential Acres	0	44,311	2,738,746

2008 Major Approved Pipeline Projects

National Harbor

2003–2008 Rezoning

N/A

Residential Pipeline Development

In 2008 there were a total of 80 residential subdivision cases approved by the Planning Board. Eighty-one percent of these approved subdivision cases were for single-family detached development, with the remainder 12 and 7 percent approved subdivisions for townhome and multifamily development, respectively. Though a majority of approved cases included solely single-family detached structures, 58 percent of units approved for subdivision were part of multifamily developments.

These approved subdivision cases indicate where new residential growth in the county will be occurring. In 2008, a majority of these approved cases were located in the northern part of the county along designated growth corridors established in the 2002 General Plan.

Konterra Town Center East

The largest residential project approved for subdivision in 2008 was Konterra Town Center East. At approximately 500 acres, this development will consist of 4,500 residential units in addition to 5.9 million square feet of commercial, retail, and office space near the planned intercounty connector in Laurel. Eighty-three percent of the residential component of Konterra Town Center East will be multifamily with the remaining 17 percent being townhomes. Developers plan to break ground on this project by 2010 and expect the project to be completed in 12 to 20 years.

The Brick Yard

The Brick Yard is a large development project that includes 750,000 square feet of commercial space in addition to 1,265 residential units. The Brick Yard's residences will include a mix of single-family townhomes and multifamily units, with ground-floor retail in some of the buildings. The site is about six miles from Fort Meade, where up to 10,000 military and civilian jobs will go as part of a pending military realignment, and just a few miles from the new U.S. Food and Drug Administration complex that is being built in White Oak, which will eventually house 7,000 jobs.

University View

University View, which currently consists of a 15-story apartment building along US 1, adjacent to the University of Maryland—College Park, plans a large expansion of approximately 500 units. The first phase is planned to take place by 2010 in front of the current University View apartment with the other phases, including a parking garage and retail, possibly materializing by 2012. Original plans called for a 177,000-square-foot office building immediately in front of the View's parking garage. However, due to high competition for office tenants from nearby sites, such as M Square plans for office space here has been scaled back.



University View

With the exception of Bevard, most large residential growth will be occurring in the northern regions of the county. In addition, denser residential development will be occurring along growth corridors that were designated in the 2002 General Plan. Map 7 provides an illustration of this development pattern.

While most new residential construction in 2008 was concentrated in the eastern portion of the county in communities such as Bowie, Largo, and Mitchellville (Subregion 3), future growth is anticipated to shift to denser developments at Hyattsville and Konterra to the north and more suburban residential development to the south of Clinton.

(Insert Table 10-Source: M-NCPPC Development Activity Monitoring System

*Includes other subdivision cases not identified in the table)

Table 10

2008 Largest Approved Subdivisions				
Subdivision	SF	TH	MF	Total Units
Konterra Town Center East	0	760	3,740	4,500
The Brick Yard	51	354	860	1,265
Bevard	357	367	0	724
University View	0	0	506	506
Quincy Manor	0	411	0	411
The Enclave At Beechfield	0	200	200	400
Parkview	0	0	274	274
Gateway Arts District Hyattsville	4	195	0	199
Addison Road South	0	196	0	196
Norbourne Property	0	165	0	165
Grand Total*	1,252	2,764	5,650	9,670

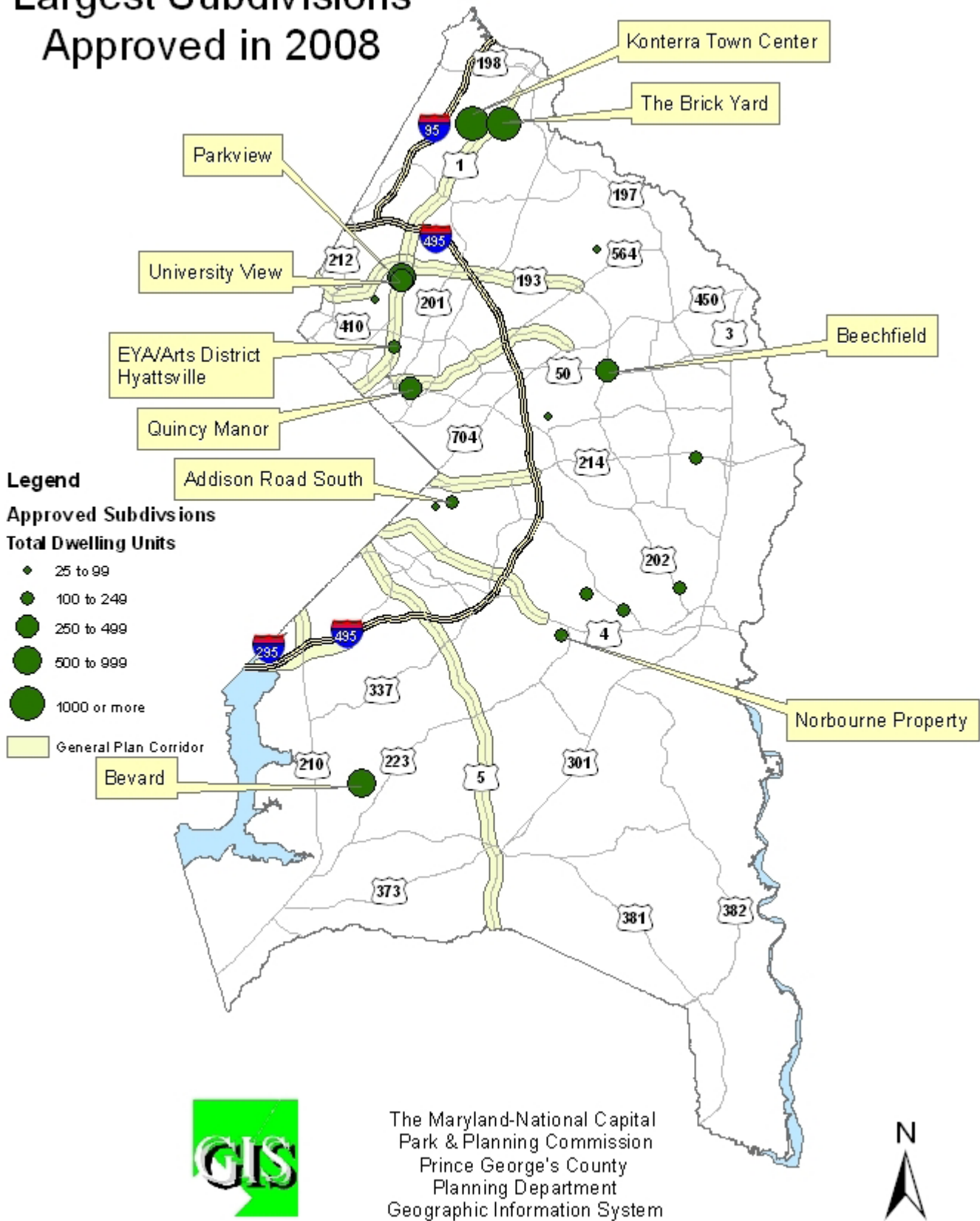
Source: M-NCPPC Development Activity Monitoring System

Table 11

Newly Approved Units in 2008 in Approved Subdivision Cases				
Subregion	SF	TH	MF	Total Units
1	54	1,114	4,600	5,769
2	63	606	780	1,451
3	151	239	270	660
4	58	196	0	255
5	526	367	0	893
6	324	242	0	566
7	76	0	0	76
Grand Total	1,252	2,764	5,650	9,670

Source: M-NCPPC Development Activity Monitoring System

Largest Subdivisions Approved in 2008



Forecasted Growth

Transportation Analysis Zones (TAZs) are the smallest forecasting geography. Forecasted growth in individual TAZs can be aggregated into larger planning areas and show specific communities that will harbor the majority of the county's residential and nonresidential growth over the next few years. Projects such as Andrews Air Force Base, Konterra, National Harbor, University Town Center, and Westphalia account for ten percent of the county's employment and three percent of the dwelling units in 2005.

Communities that are expected to generate the largest share of residential growth between 2010 and 2015 are Tippet, Westphalia, South Potomac Sector, Brandywine, College Park and Laurel. The highest employment growth between this period will be in the Northwestern, South Potomac, Westphalia, Melwood, and Hyattsville planning areas.


Table 12

Top Five Growth Areas (2010–2015)			
Dwelling Units			
Community (Planning Area)	Significant Project	Share of County Growth	New Units/Jobs
Tippet	Bevard	12%	1,583
Westphalia	Smith Home Farms	11%	1,507
South Potomac	National Harbor	9%	1,288
Brandywine	Chaddsford	9%	1,283
College Park	University Town Center	7%	968
Employment			
Northwestern Area	Konterra	15%	2,518
South Potomac	National Harbor	14%	2,361
Westphalia	Westphalia Town Center	12%	1,899
Melwood	Andrews Air Force Base	11%	1,760
Hyattsville	Arts District Hyattsville	9%	1,535

Source: Preliminary Round 7.2A Cooperative Forecast





2010 - 2015 Dwelling Unit Growth by COG TAZ

Legend

 Planning Area with High Growth

Round 7.2A COG TAZ

Dwelling Unit Growth

-  0 - 99
-  100 - 249
-  250 - 499
-  500 - 1024

College Park/
Berwyn Heights

Westphalia

South Potomac Sector

Tippett

Brandywine



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2010 - 2015 Employment Growth by COG TAZ

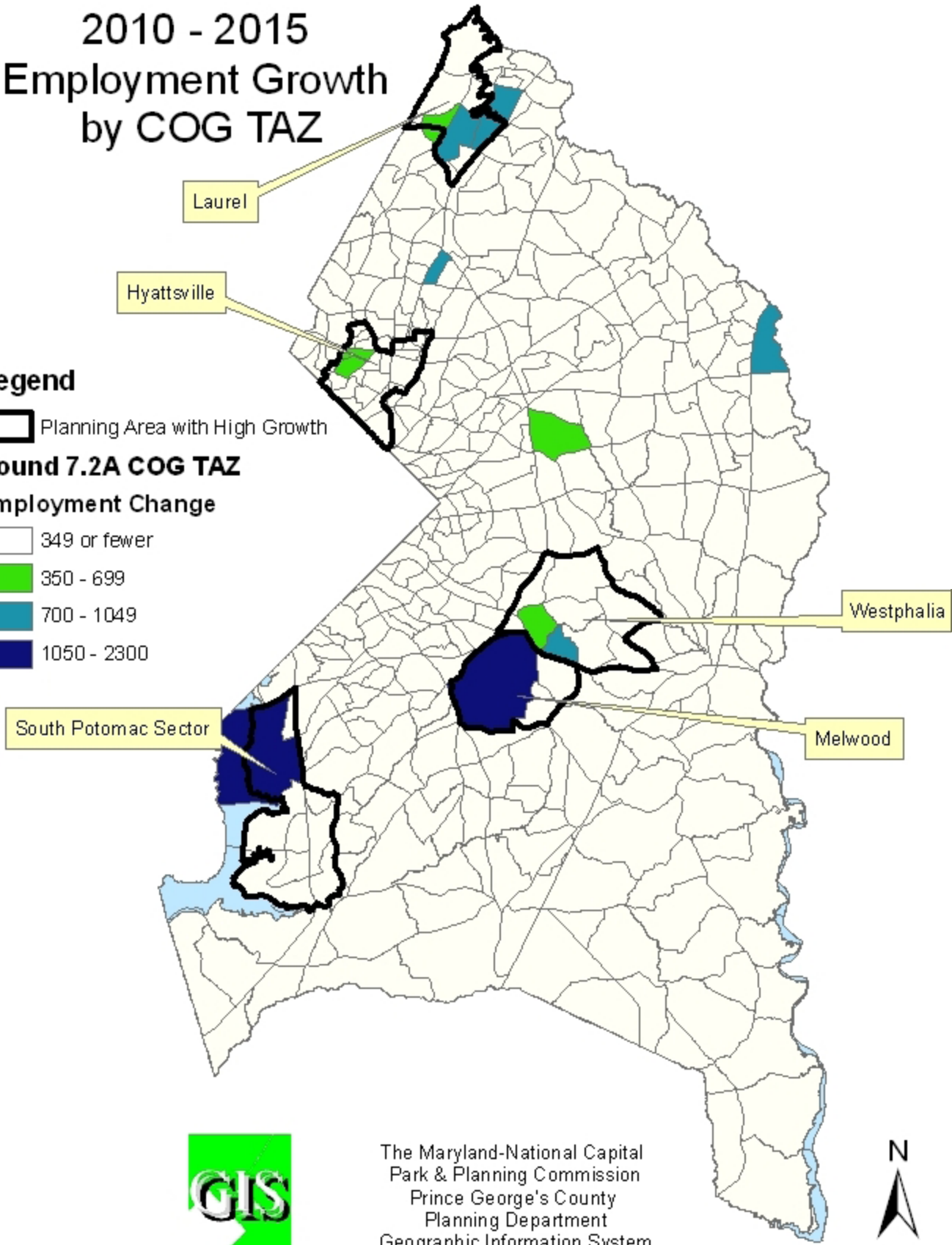
Legend

 Planning Area with High Growth

Round 7.2A COG TAZ

Employment Change

-  349 or fewer
-  350 - 699
-  700 - 1049
-  1050 - 2300



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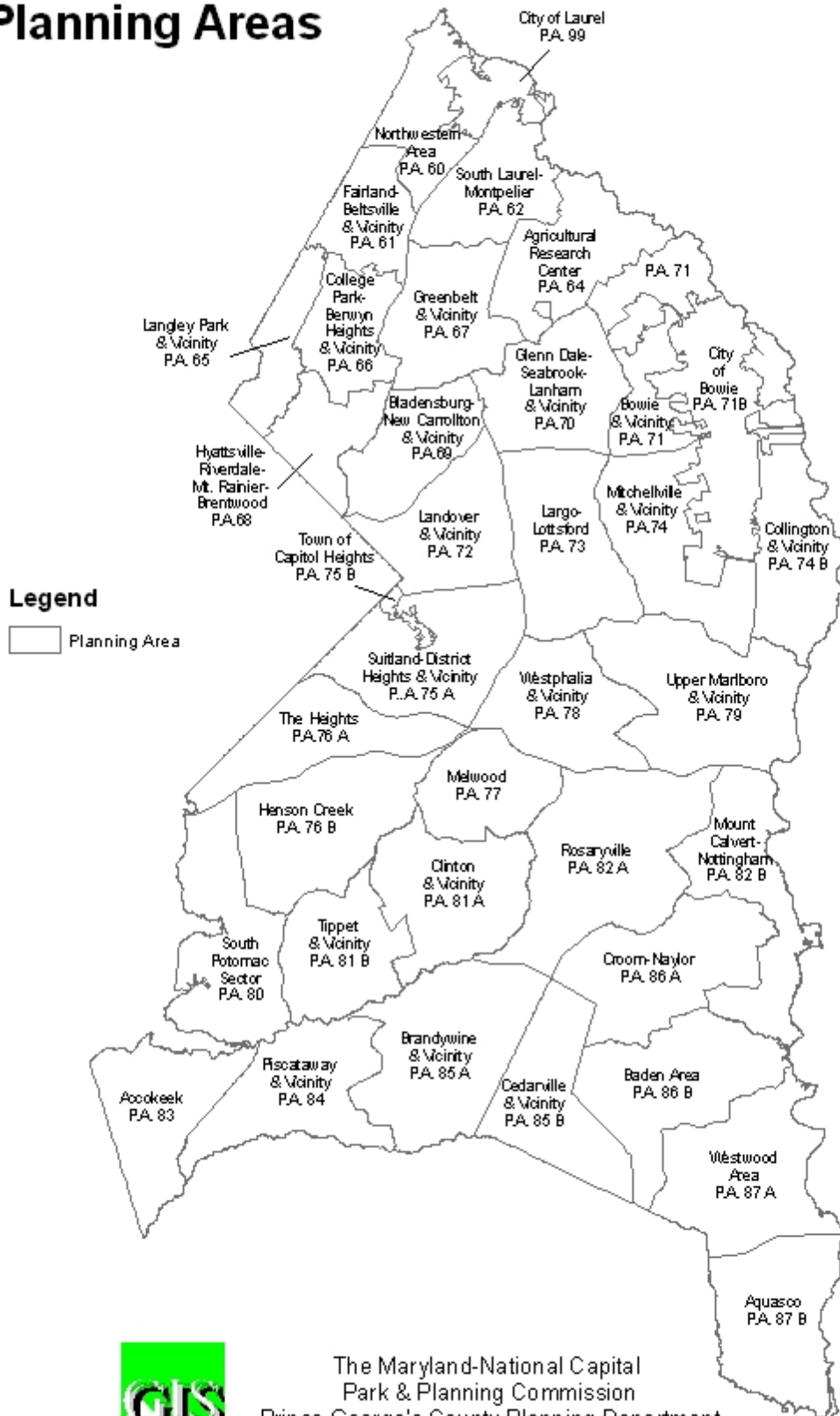
Summary of 2008 Development Activity

In 2008, the largest new residential developments were in the Developing Tier, in and around the Bowie area, as well as southwestern sections of the county, with projects such as National Harbor and Tribeca at Camp Springs. There has been a resurgence of multifamily development (mostly condos) in the county, particularly in close proximity to interstates and Metro stations. Still, due to the national downturn in the housing market, the county may experience a rise in request to convert planned condos to rental units.

In 2008, the number of nonresidential acres developed was almost evenly split between nonindustrial (office and retail) and industrial uses. The largest new nonresidential developments were all in the Developing Tier and included projects such as National Harbor, Brandywine Crossing, and the Brick Yard.

Future planned projects in the northern section of the county, such as Konterra Town Center East and The Brick Yard, will help draw in a professional class workforce associated with military job realignment occurring just a few miles from Fort Meade along with the building of a new U.S. Food and Drug Administration complex in White Oak, Maryland. Other projects closer in proximity to the University of Maryland such as University View and the Gateway Arts District in Hyattsville are attracting a “creative class” that learn and work in a variety of fields, (engineering, architecture, theater, education, biotech, etc.), requiring creativity and innovation. Planning areas that are expected to see the most residential growth over the next five years are Tippet, Westphalia, the South Potomac Sector, Brandywine, College Park, and Laurel.

Prince George's County Planning Areas



The Maryland-National Capital
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Appendix

A2: Zoning categories

(Only includes a description of zones discussed in this report)

C-2: General Commercial, Existing—All of the uses permitted in the C-S-C Zone, with additions and modifications (this zone is no longer used in current zoning activities)

C-M: Commercial Miscellaneous—Varied commercial uses, including office and highway-oriented uses, which may be disruptive to the compactness and homogeneity of retail shopping centers.

C-S-C: Commercial Shopping Center—Retail and service commercial activities generally located within shopping center facilities; size will vary according to trade area.

E-I-A: Employment and Institutional Area—A concentration of nonretail employment and institutional uses and services such as medical, manufacturing, office, religious, educational, recreational, and governmental.

I-1: Light Industrial—Light intensity manufacturing, warehousing, and distributions uses; 10 percent green area required.

I-2: Heavy Industrial—Highly intensive industrial and manufacturing uses; 10 percent green area required.

I-3: Planned Industrial/Employment Park—Uses that will minimize detrimental effects on residential and other adjacent areas; a mixture of industrial, research, and office uses with compatible institutional, recreational, and service uses in a manner that will retain the dominant industrial/employment character of the zone; standard minimum tract size of 25 adjoining gross acres; standard minimum lot size of two acres; Conceptual Plan approval required; 25 percent green area required; outdoor uses restricted; warehousing and wholesaling uses limited.

I-4: Limited Intensity (0.3 FAR) commercial, manufacturing, warehousing, and distribution uses; development standards extended to assure limited intensity industrial and commercial development, and compatibility with surrounding zoning and uses; 25 percent green area required.

L-A-C: Local Activity Center—A mixture of commercial retail and services uses along with complementary residential densities within a hierarchy of centers servicing three distinct service areas: neighborhood, village, and community.

M-A-C: Major Activity Center—A mixture of uses which serve a regional residential market or provide concentrated employment, arranged to allow easy pedestrian access between uses; two types of functional centers are described: Major Metro and New Town or Corridor City.

M-U-I: Mixed-Use Infill—Promotes Smart Growth principles by encouraging the efficient use of land, public facilities and services in areas that are substantially developed. These regulations are intended to create community environments enhanced by a mix of residential, commercial, recreational, open space, employment and institutional uses in accordance with approved plans. The infill zone may only be approved for property located in Transit District Overlay Zone or a Development District Overlay Zone.

M-X-T: Mixed Use- Transit Oriented—Provides for a variety of residential, commercial and employment uses; mandates at least two out of the following three use categories: (1) Retail businesses; (2) Office/Research/Industrial; (3) Dwellings, hotel/motel; encourages a 24-hour functional environment; must be located near a major intersection or a major transit stop or at a location for which the applicable Master Plan recommends mixed uses similar to those permitted in the M-X-T Zone.

R-10: Multifamily High Density Residential—Provides for suitable sites for high density residential in proximity to commercial and cultural centers; also permits single-family detached dwellings. Detailed Site Plan approval required for buildings 110 feet in height or less; special exception required for buildings over 110 feet in height.

R-80: One-Family Detached Residential—Provides for variation in the size, shape and width of subdivision lots to better utilize the natural terrain and to facilitate planning of single-family developments with lots and dwellings of various sizes and styles.

R-L: Residential Low Development—Provides for low-density residential development in areas recommended by a Master Plan for alternative low-density development techniques. The zone allows a mixture of residential types and lot sizes generally corresponding to single-family development; provides for limited commercial uses necessary to serve the dominant residential uses.

R-M: Residential Medium Development—A mixture of residential types with a medium-density range; provides for limited commercial uses necessary to serve the dominant residential uses.

R-R: Rural Residential—Permits approximately one-half-acre residential lots; subdivision lot sizes depend on date of recordation; allows a number of nonresidential special exception uses.

R-S: Residential Suburban Development—A mixture of residential types within the suburban density range generally corresponding to low-density single-family development; provides for limited commercial uses necessary to serve the dominant residential uses.

R-T: Townhouse—Permits one-family detached and attached two-family, and three-family dwellings; promotes the maximum amount of freedom in the design of attached dwellings and their grouping and layout; Detailed Site Plan approval required for attached dwellings.

U-L-I: Urban Light Industrial—Designed to attract and retain a variety of small-scale light industrial uses in older, mostly developed industrial areas located close to established residential communities; establishes a flexible regulatory process with appropriate standards to promote reinvestment in, and redevelopment of, older urban industrial areas as employment centers, in a manner compatible with adjacent residential areas.

Acknowledgments

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