

Berwyn Heights NW Corridors Economic Development Strategy

Town Council Presentation

April 6, 2026

Agenda

- Project Overview
- Stakeholder Engagement
- Corridor Market Context
- SWOT Overview
- Redevelopment Potential Analysis
- Discussion



Image Source: AECOM

Project Overview

- AECOM and M-NCPPC are collaborating on an Economic Development Strategy for the Town of Berwyn Heights, funded by M-NCPPC Prince George's County Planning Department's PAMC* program
- This assessment is intended to complement and build on the **2024 Berwyn Heights Placemaking Project, ACTION PLAN**, the **UMD Berwyn Heights Community Strengths and Needs Assessment**, and other previous planning and visioning efforts undertaken for the study area
- The intent of the strategy is to provide the town with targeted recommendations to support economic development



Image Source: AECOM

Project Overview



Kickoff +
Refine Work
Plan



Site Visit +
Stakeholder
Engagement



SWOT
Analysis



Market
Conditions
Assessment



Final Strategy

We are here

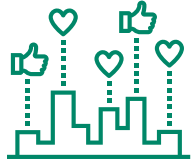
Draft Goals



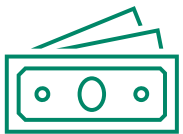
“Rebrand” Greenbelt Road in Berwyn Heights



Activate the Corridors



Encourage High-Quality, Diverse Development



Attract Private Investment



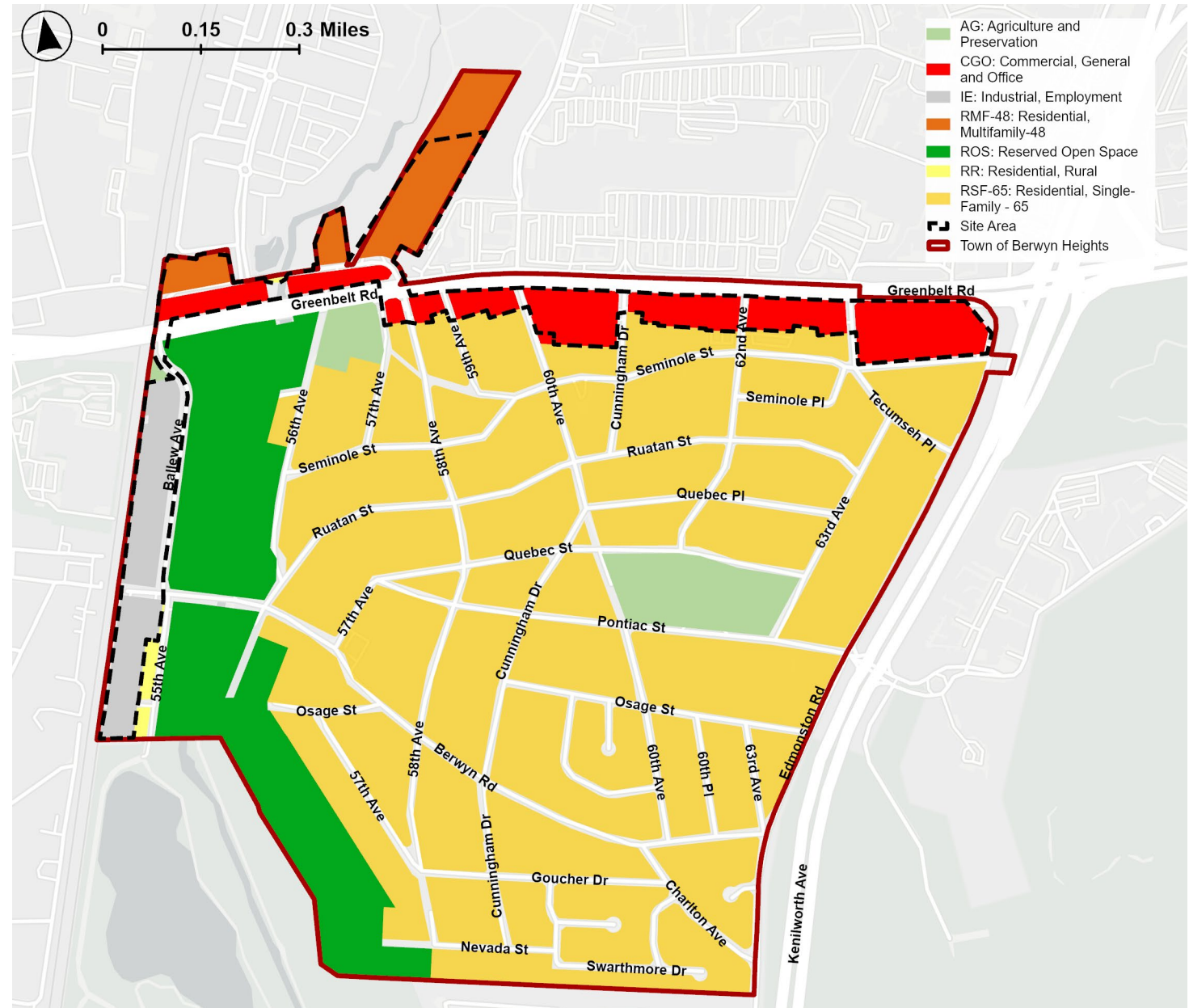
Build Economic Development Capacity



Leverage Synergies with Neighboring Communities

Site Context

- The focus areas for this project are **Greenbelt Road** and **Ballew Avenue**
- Zoning provides the framework for the **type and form of uses** allowed/encouraged along the corridor
- Most of Greenbelt Rd is in the **Commercial, General, and Office (CGO)** zone
- Nearly all of Ballew Avenue is in the **Industrial/Employment (IE)** zone
- **Single-family residential zoning (RSF-65)** comprises most of the land in the Town of Berwyn Heights, with ~245 acres, or 68% of the total area



Source: AECOM. Data Layers: Planning Department of Prince George's County: Zoning_Ln. <https://gisdata.pgplanning.org/opendata/>. Data accessed February 2026.



Stakeholder Engagement

Site Visit

- The project team participated in a Site Visit with Town staff on October 9th, 2025
- Key **sites of interest** included:
 - Lake Artemesia and Indian Creek Trail
 - Berwyn Heights playground
 - Town-owned property
 - Police Station
 - Redeveloped Dunkin Site (6329 Greenbelt Rd.)
 - Prince George's Scrap
 - Former Balkonie Restaurant property (6323 Greenbelt Rd.)



Source: AECOM. Data Layers: Planning Department of Prince George's County: Building_2023_Py. <https://gisdata.pgplanning.org/opendata/>. Data accessed February 2026.

Stakeholder Interviews

- The project team conducted **stakeholder interviews** with the following organizations:
 - Town of Berwyn Heights staff and leadership
 - Quantum Management Corp
 - Maryland Neighborly Networks
 - County District 1
 - County District 3
 - County District 4
 - Long and Foster Real Estate, Inc.
 - The Restaurant Broker, LLC
 - College Park Economic Development
 - Greenbelt Economic Development
- Key takeaways from the **stakeholder interviews informed the SWOT analysis**, and confirmed the market data collected



Image Source: AECOM

Market Analysis Key Findings

Executive Summary



Berwyn Heights is Growing, but Slowly

- Berwyn Heights has grown at a **slower rate (0.5%)** than the **County (0.9%)** over the last decade-plus



The Town is Home to Young Families, Empty Nesters – and Very Few Singles

- Town household sizes are **significantly larger** than County averages (3.6 vs 2.7, respectively), and median age is younger than the County's by 4 years
- Nearly **half (48%)** of Town households include someone **65 or older**, highlighting the growing need to accommodate seniors aging in place



Town Housing Stock is Aging and Lacks Variety

- Nearly **90%** of the Town's housing stock was built **before 1970**, and supply has decreased over the last decade



Berwyn Heights' Economy is Symbiotic with College Park and Greenbelt's

- **23%** of Berwyn Heights' working residents **commute to College Park**

Both Focus Area Corridors are Underbuilt and Underperforming Relative to Potential

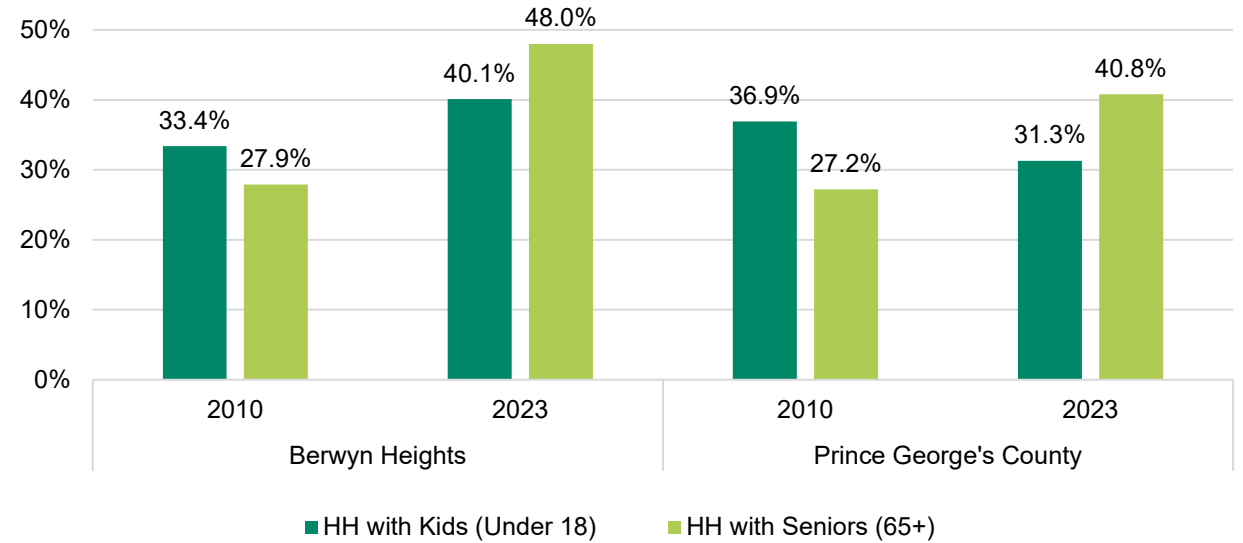
- 50% of visits to the corridor are **under 10 minutes**
- **Low site utilization** combined with **strong market metrics** indicate that study area is **underbuilt** relative to potential



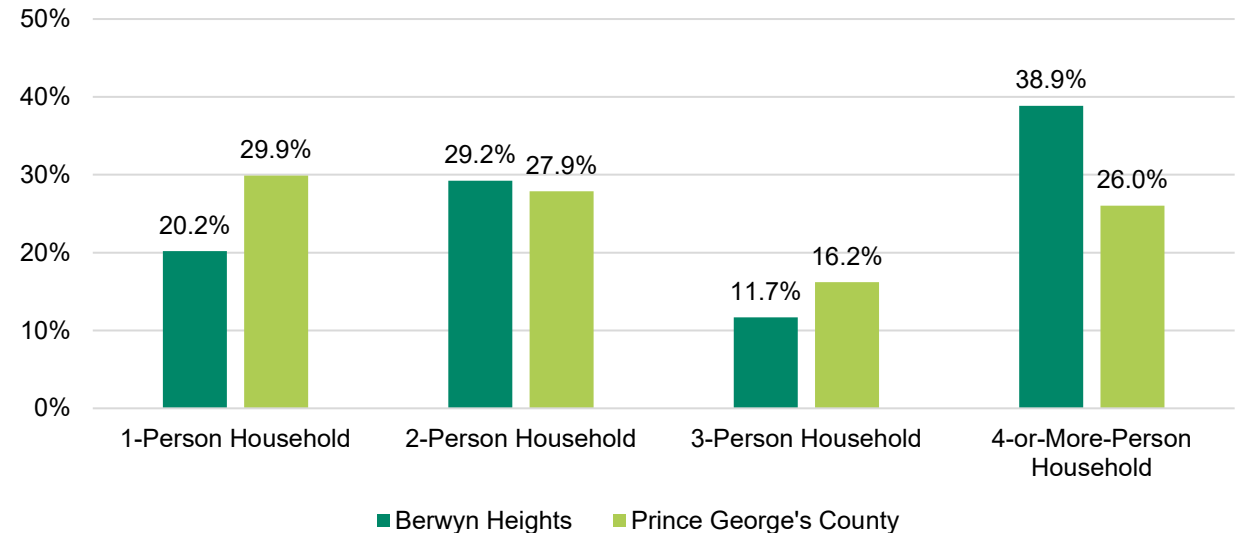
Population and Households

- From 2010 to 2023, Berwyn Heights' population grew by **0.5% annually**, or ~16 people per year compared to the County annual rate of 0.9%, to reach 3,306 in 2023
- The average household size experienced modest growth during the same period, increasing by 1.1% from 3.12 to **3.60**, compared to the County average of **2.72**
- The town's median age was 34 in 2023, **younger than the County's (38)** by 4 years
- At the same time, nearly **half (48%)** of Town households include someone **65 or older**; **40% include someone under 18**, compared to 40% and 31% of County households, respectively

Household Breakdown

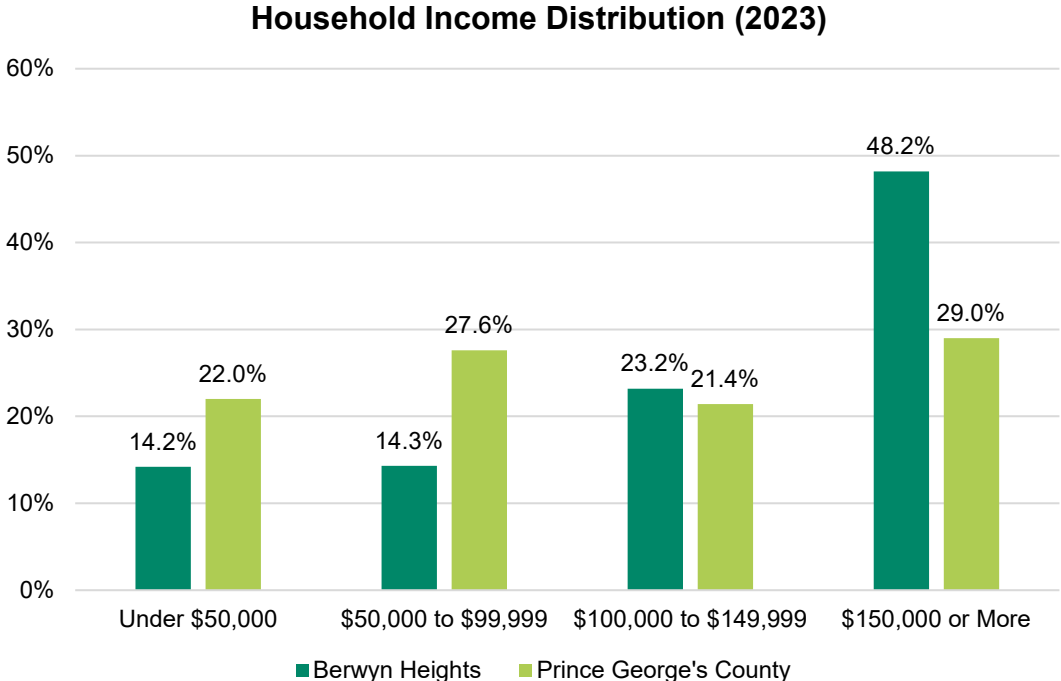


Household Distribution (2023)



Income

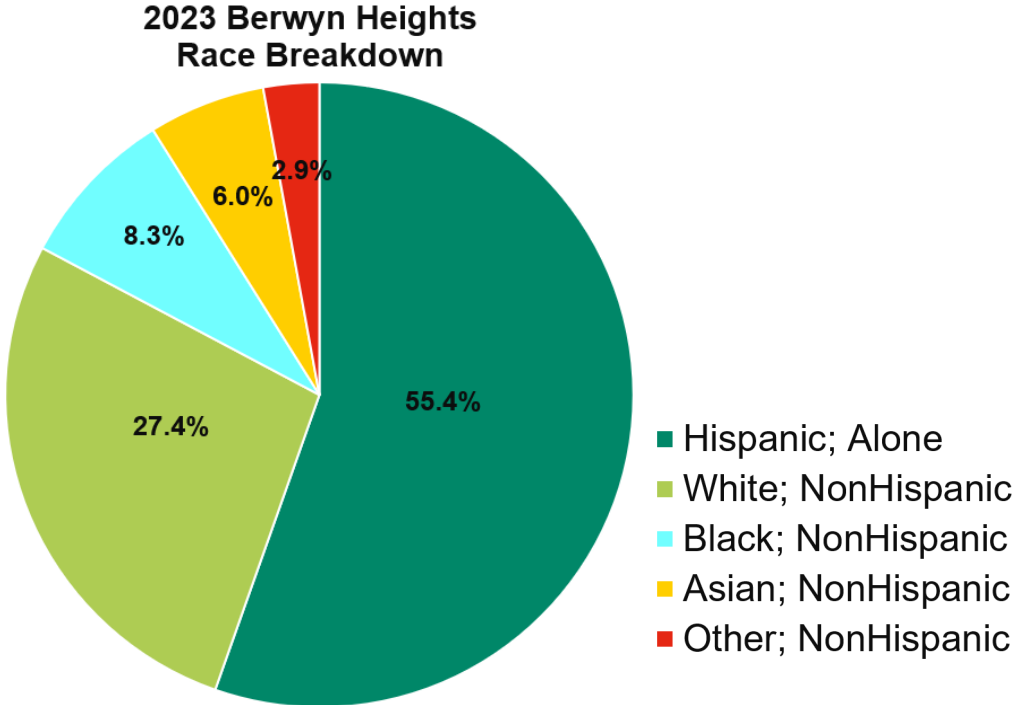
- Berwyn Heights has a median household income of \$146,000 (45% higher than Prince George’s County, 18% above the D.C. metro median)
- Nearly **50% of households earn \$150,000 or more**, while ~14% earn less than \$50,000



* HH - Households
 Source: American Community Survey; AECOM

Race

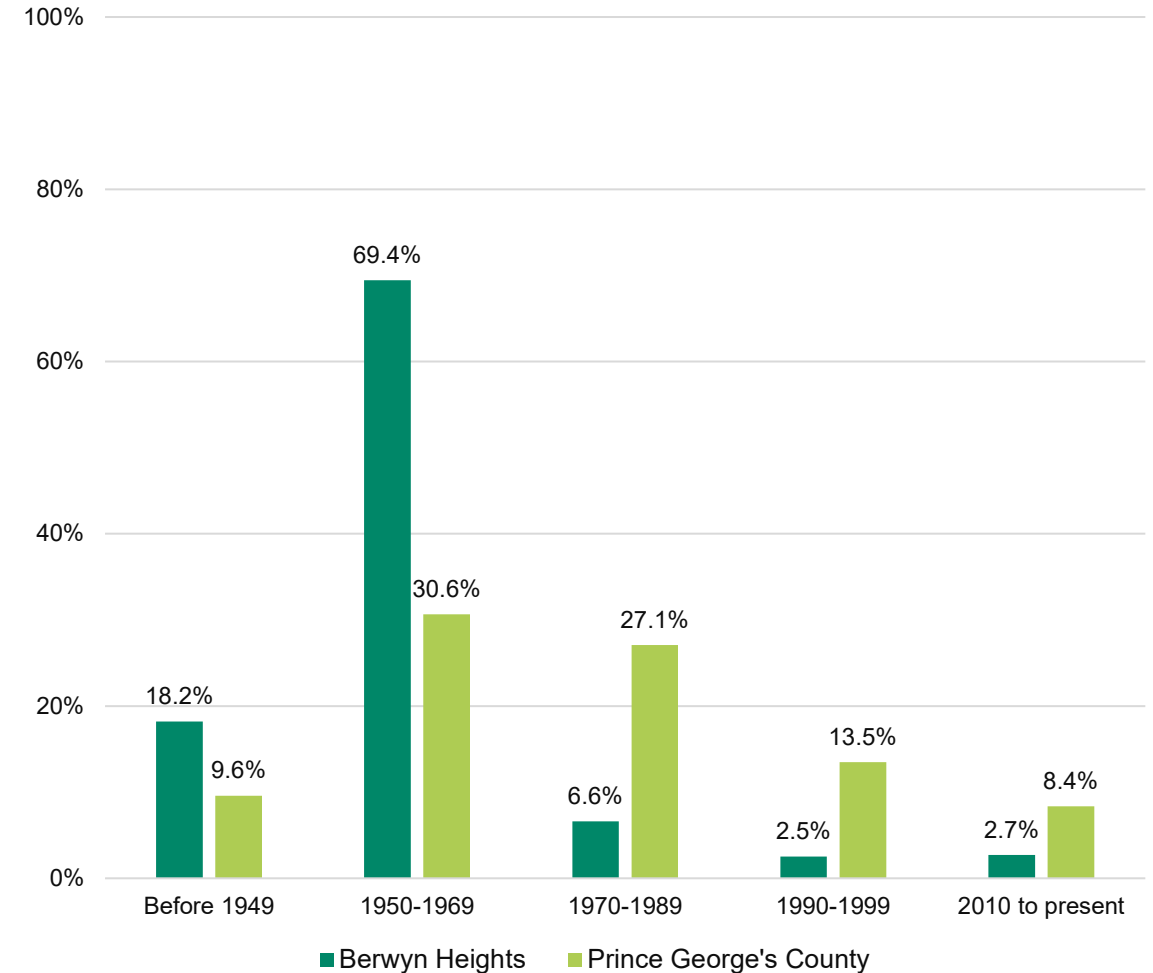
- The Town is **diversifying**; between 2010 and 2023, the share of Berwyn Heights residents identifying as Hispanic **more than doubled**, rising from 25% to 55%, compared with 22% countywide



Housing Summary

- Housing units in Berwyn Heights have **decreased by ~5 units annually** since 2010¹
- Home values have **increased more for the Town** than for the County overall (Berwyn Heights: 3.5%; Prince George's County: 2.7%)²
- In 2023, **96% of housing units in Berwyn Heights were single-family**, compared to 66% of the County's
- Renter housing costs increased from **\$1,691 in 2010** to **\$2,632 in 2023**, (0.8% CAGR³); **median owner housing costs declined** (\$2,897 in 2010 to \$2,689 in 2023)
- **Nearly 90% of Town's housing stock was built before 1970**, compared to 40% of the County's
- Most Berwyn Heights homes (86%) are **owner-occupied**, compared to **38%** of County homes

Housing Stock by Year Built (2023)



Source: American Community Survey; Zillow; AECOM

¹From 1,025 in 2010 to 955 in 2023

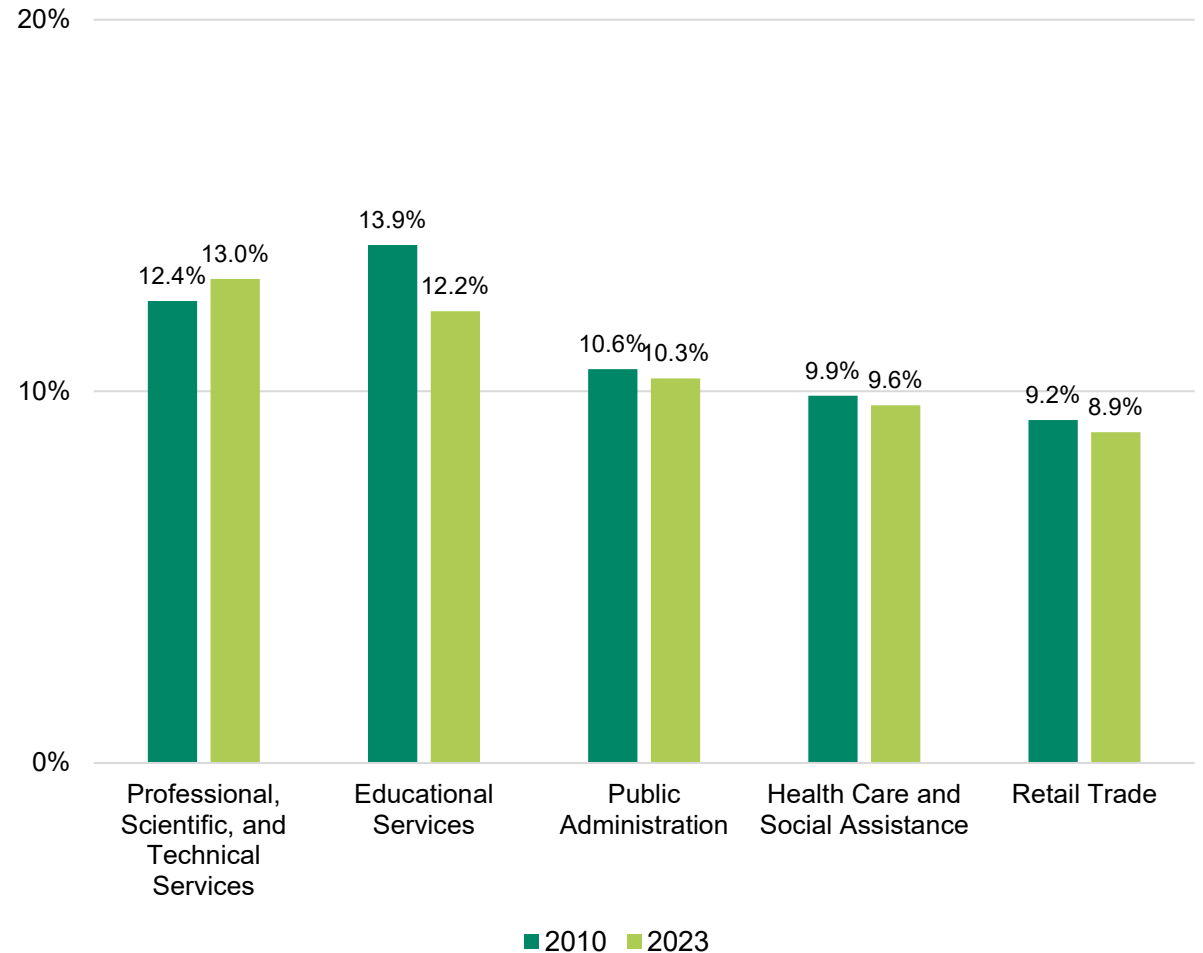
²Berwyn Heights: Median Home Value Index increased from \$268,875 in 2010 (inflation-adjusted) to \$421,357 in 2023. Prince George's County: Median Home Value Index increased from \$301,458 in 2010 (inflation-adjusted) to \$425,853 in 2023.

³Compound Annual Growth Rate .

Employment

- Top industries employing Berwyn Heights residents include **Professional Services** (13%) and Educational Services (12%); in 2023, **13% of Berwyn Heights workers were federal employees, compared to 5.4% in Prince George's County**
- Largest share of Town residents work in Prince George's County, MD (33%), D.C. (23%), or Montgomery County, MD (20%); **only 0.8% of residents** both live and work in Berwyn Heights
- **23% of in-county commuters work in College Park;** followed by Beltsville (10.1%) and Greenbelt (6.9%)
- **27% of Town residents work from home,** compared to 15% in the County
- **41% of Town adults*** have a bachelor's degree or higher, compared to 36% of County adults

Top Industries Berwyn Heights Residents Work In, 2010 and 2023

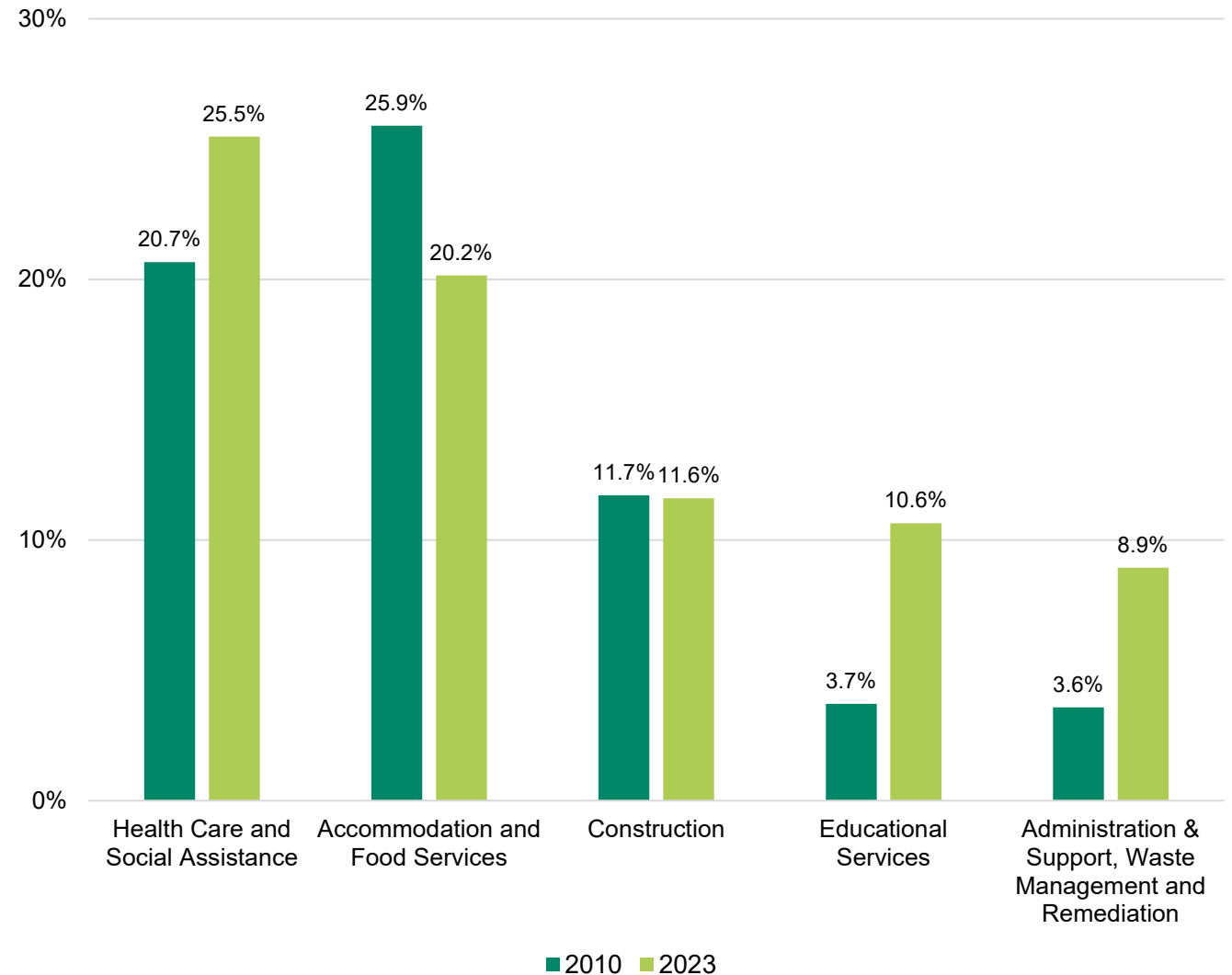


* 25 years or Older
Source: US Census; OntheMap; AECOM

Industry Growth and Change

- There are ~**530 jobs in Berwyn Heights**; most workers live in Prince George’s County (48.7%), Montgomery County (12.2%), and Howard County (6.1%)
- Berwyn Height’s growing industries are **Educational Services** (8.4% CAGR) and **Administration and Support, Waste Management and Remediation** (7.3% CAGR)¹
- The fastest growing County industries are **Accommodation and Food Services** (2% annual growth) and **Arts, Entertainment, and Recreation** (1.8% CAGR)²
- The **University of Maryland** is continuing to **expand** through its Greater College Park initiative

Top Industries Located in Berwyn Heights, 2010 and 2023



¹ Based on data from 2010-2023

² Based on data from 2010-2023 and minimum of 500 jobs

Source: Census OnTheMap; Lightcast; State of Maryland; University of Maryland; AECOM

Real Estate

- Average year built for commercial properties in study area is **1977**
- Despite **high occupancies (100% for retail and 95% for industrial) and strong rent performance**, assessed commercial and industrial land values in the study area are **lower** than College Park, Greenbelt*
- Under IE zoning, nonresidential uses are not subject to a maximum density limit (65% lot coverage); current lot coverage along Ballew is only **13%**, **52% lower** than the allowed maximum
- Neither corridor has existing residential, but residential units (up to 20 per acre in IE and 48 per acre in CGO zones) are **allowed by-right** along both corridors
- Both study area corridors appear to be **lagging their market and zoning potential**

Zoning Capacity vs. Existing Development Intensity		
Metric	Commercial, General and Office (CGO) Zone	Industrial, Employment (IE) Zone
Maximum Residential Density	48 units per acre; 70% max lot coverage	20 units per acre; 45% max lot coverage
Current Residential Density	N/A	N/A
Maximum Lot Coverage (% of Net Lot Area)	No maximum requirement for non-residential	65%
Average Existing Lot Coverage (Study Area)	22.6%	12.7%

Source: CoStar, Prince George's County; AECOM

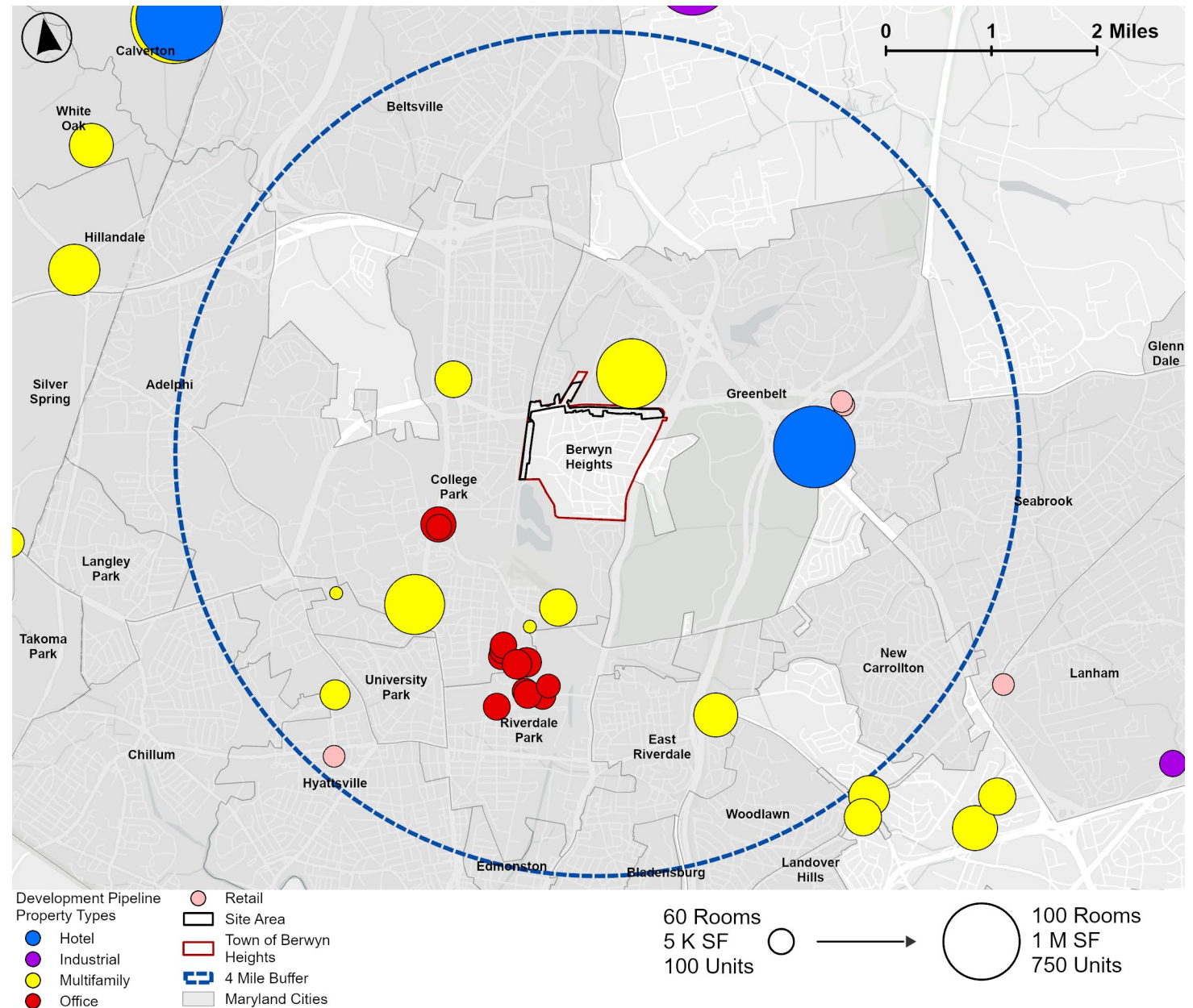
*Berwyn Heights industrial avg.: \$377K/acre; commercial: \$2.3 mil/acre. College Park industrial avg: \$1.4 mil/acre; commercial: \$3.2 mil/acre. Greenbelt does not have any industrial land; commercial avg: \$2.5 mil/acre. Prince George's County industrial avg: \$1.05 mil/acre; commercial \$1.7 mil/acre

Real Estate

- The redevelopment of Beltway Plaza is anticipated to produce 750 new multifamily units in Greenbelt; **College Park has over 1,100 units of multifamily** in the pipeline
- There are **~12,000 units of multifamily**, 4.1mil SF of office, 674k SF of retail and 10.1mil SF of industrial in the County pipeline
- Berwyn Heights' per-square-foot (PSF) office and industrial rents are **significantly higher** than County averages; retail rents are similar
 - Medical office rents average around \$28 PSF for both Town and County
- **Strong performance** for both office and industrial rents in Berwyn Heights suggest **opportunities for expansion**

Source: CoStar, AECOM

*According to CoStar, avg. PSF rents for office are \$28 for Berwyn Heights, \$23.03 for Prince George's; industrial rents are \$16 for Town and \$13 Countywide; avg. PSF rents for retail are around \$20 for both



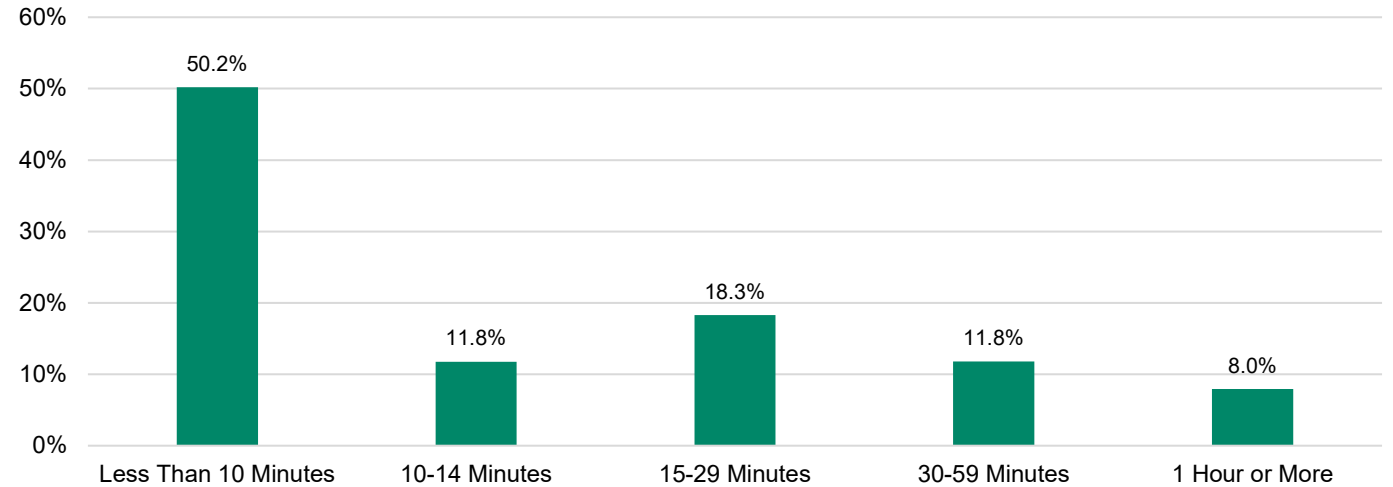
AECOM. Data Layers: CoStar. <https://www.costar.com/>. Data accessed February 2026.

Corridor Activity

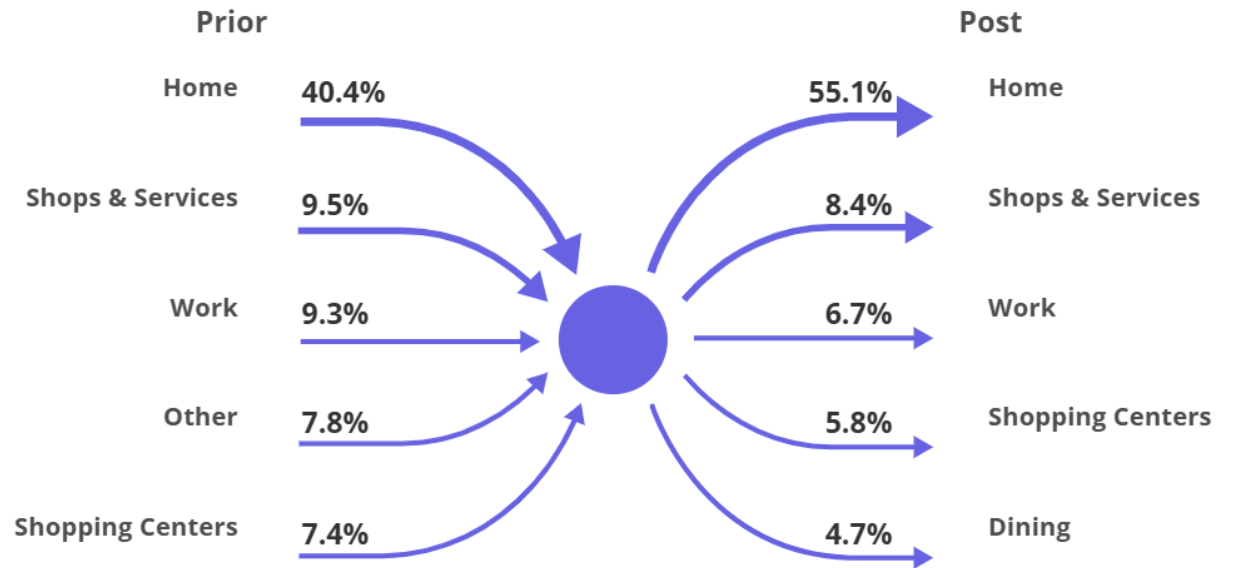
- In 2025, the study area had **3.2 million annual visits**, up from the 2.5 million during pre-pandemic (2019)
- The three establishments with the highest number of visits along the corridor are **Aldi (~550K Visits)**, 7-Eleven (197K Visits), and Shell (194K Visits)*
- 40% of visitors began their trip at home, and **55% return home** following their visit
- **50% of visits to the corridor are under 10 minutes**, highlighting the lack of the types of retail, dining, and entertainment amenities that typically encourage consumers to linger, spend longer, and spend more

*Aldi – 8904 62nd Ave; 7-Eleven – 5815 Greenbelt Rd; Shell – 6001 Greenbelt Rd

Study Area: Visit Duration (2025)



Study Area: Visitor Journey



Source: AECOM. Placer.ai. Data Layer: Hourly Visits for Corridor. <https://placer.ai/>. Data accessed February 2026

Spending Activity

- Consumer spending by Berwyn Heights households in the **grocery, dining, fuel, and automotive categories exceeds national averages**, with indexes ranging from 141 to 157*
- The index indicates that Town households are spending **41%–57% more** on retail items than the national average
- **Town households have significant spending power** relative to the general population, but **limited local options** for retail, services, and dining
- **Selective redevelopment** along the corridor presents a major opportunity to **capture more spending** by Town households, and reduce retail leakage to surrounding municipalities

Source: ESRI; BLS; AECOM

*A score of 100 is on par with broader U.S. spending; results over 100 indicate higher spending than average

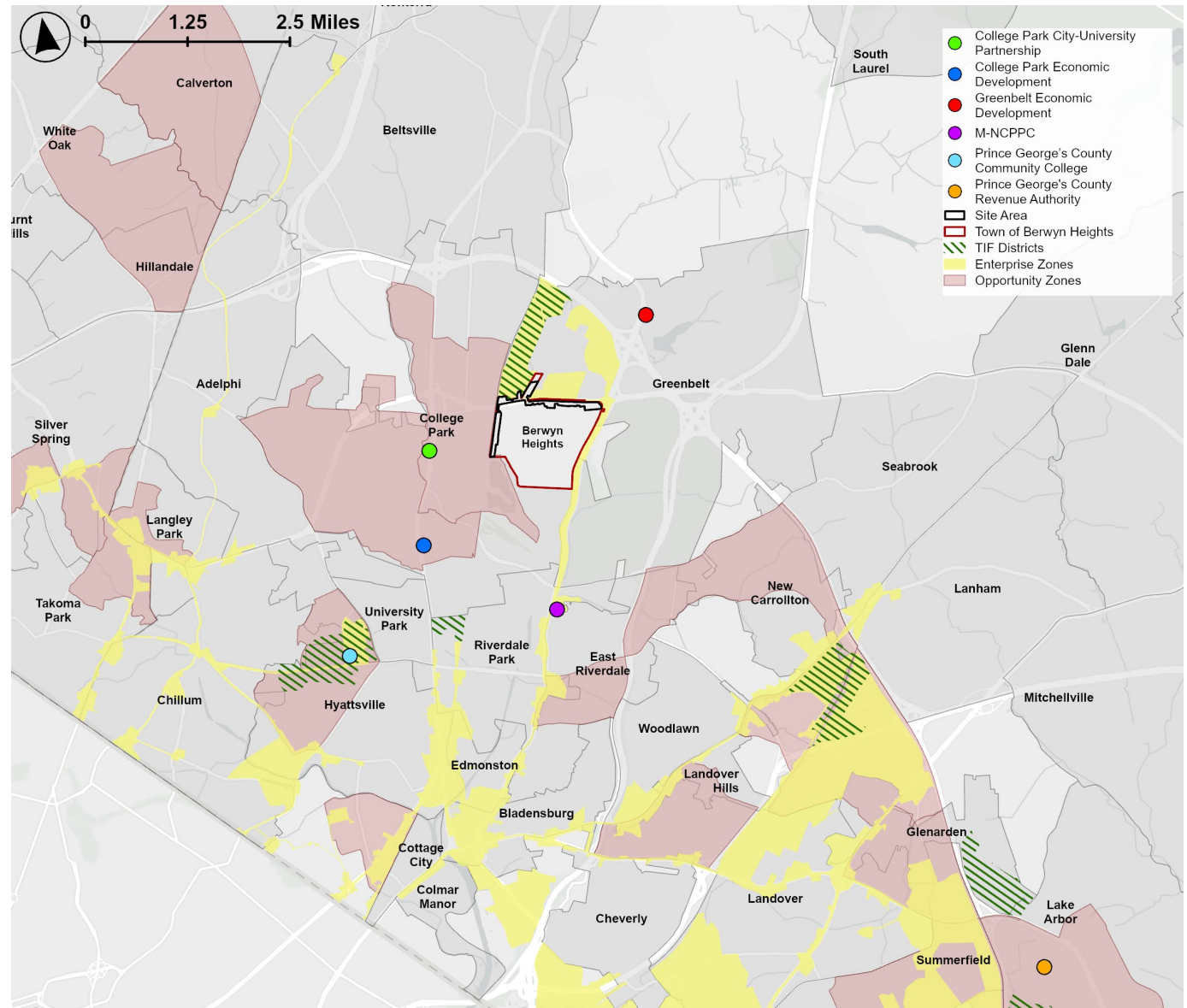
Typical Household Spending: 2025 (Berwyn Heights, MD)				
NAICS Code	NAICS Name	Total Annual Expenditures (\$)	Average Expenditure per Household (\$)	Spending Index (U.S. = 100)
4451	Grocery Stores	7.89 M	7,897.33	148
7225	Restaurants and Other Eating Places	7.14 M	7,151.17	157
4523	Warehouse Clubs and Supercenters	5.91 M	5,915.12	147
4471	Gasoline Stations	5.59 M	5,600.10	146
4411	Automobile Dealers	4.17 M	4,171.72	150
4541	Electronic Shopping and Mail-Order Houses	3.53 M	3,531.58	148
4441	Building Material and Supplies Dealers	1.92 M	1,923.93	153
4481	Clothing Stores	1.51 M	1,515.31	152
4461	Health and Personal Care Stores	1.17 M	1,173.52	141
4421	Furniture Stores	979 K	980.03	152

Source: ESRI; AECOM

Table shows typical household spending in Berwyn Heights, MD across key retail categories, based on ESRI's Consumer Spending data, which models typical household expenditures using national surveys and local demographics.

Economic and Workforce Development Resources

- M-NCPPC provides technical assistance for **planning and economic development**
- Prince George's County EDC¹ fosters business **development, attraction, retention, and expansion**
- Prince George's County Revenue Authority leads County **real estate development and finance**
- PGCC² offers degree and non-degree programs for **workforce development**
- The College Park and Greenbelt **Economic Development** offices support business attraction, retention, and expansion in both Cities
- Mtech Ventures, Startup Shell, and Startup UMD are **business incubators** clustered in and around College Park



Source: AECOM. Data Layers: Planning Department of Prince George's County: TIF_District. <https://gisdata.pgplanning.org/opendata/>. Data accessed August 2025; State of Maryland: MD iMAP: Maryland Incentive Zones - Enterprise Zones. <https://opendata.maryland.gov/>. Data accessed August 2025; U.S. Department of the Treasury: Qualified Opportunity Zones. <https://www.arcgis.com/home/item.html?id=c28056bb1d374d35936224b20f951b4a>. Data accessed February 2026

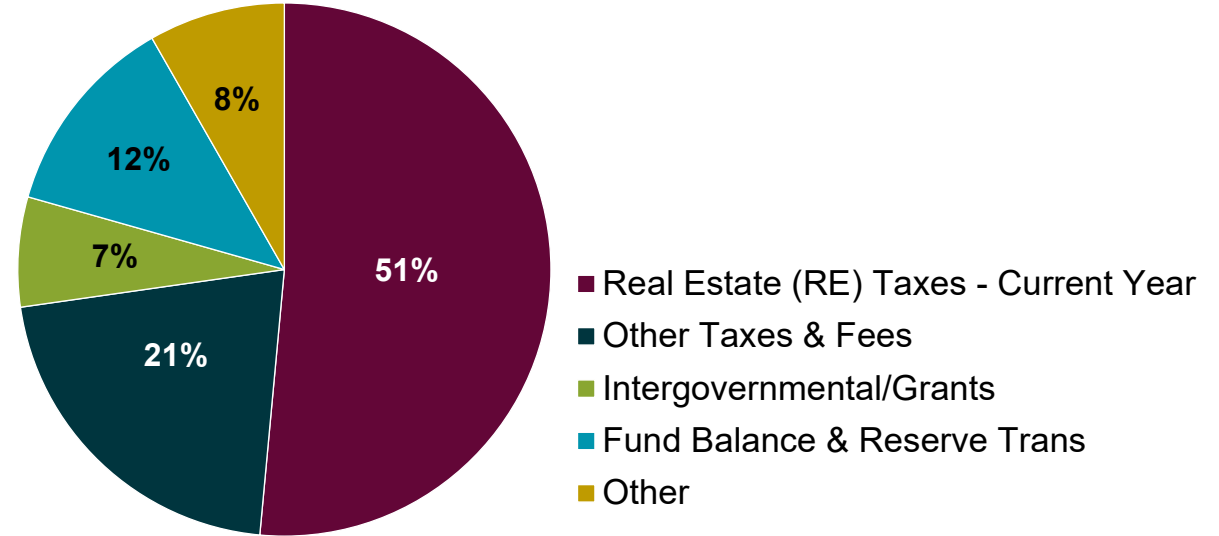
¹Economic Development Corporation

²Prince George's Community College

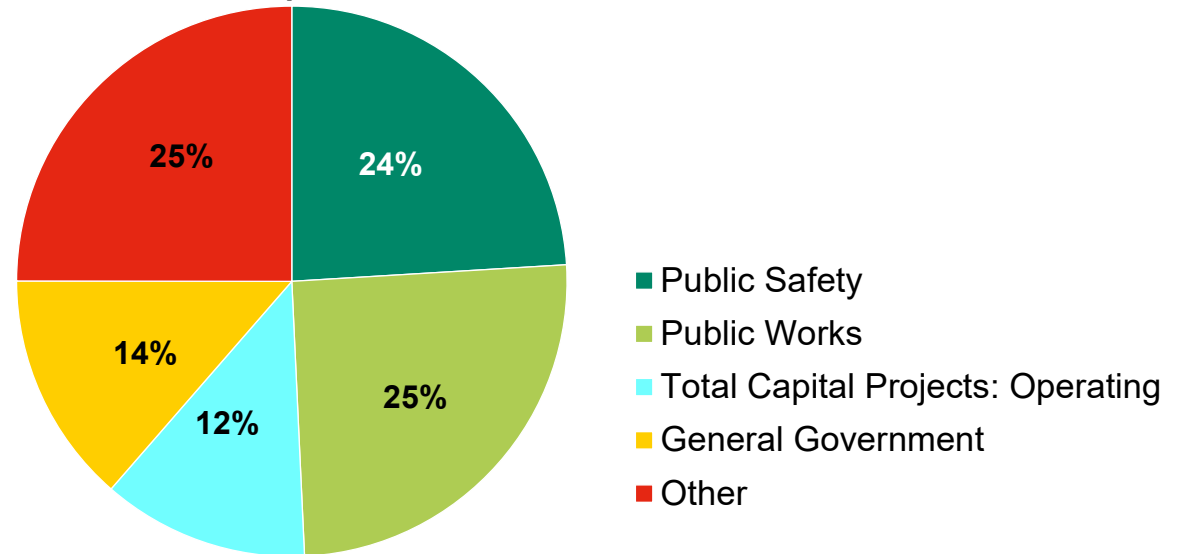
Tax Implications

- The study area is a **significantly underleveraged source of non-residential tax revenue** for the Town
- Largest share of Town revenues (51%) come from **real estate taxes**
- Berwyn Heights' combined tax rate of 1.42 per \$100 is comparable to neighbors'
- Approximately **half of the town's expenditures** are dedicated to **Public Works (25%)** and **Public Safety (24%)**
- The study area corridor accounts for **13.2% of Berwyn Heights' total assessed value**
- **Properties within the study area have an average total assessed value of \$1.2 million**, compared to \$362,000 for properties in the remainder of the town

Berwyn Heights
2024 Total Revenue

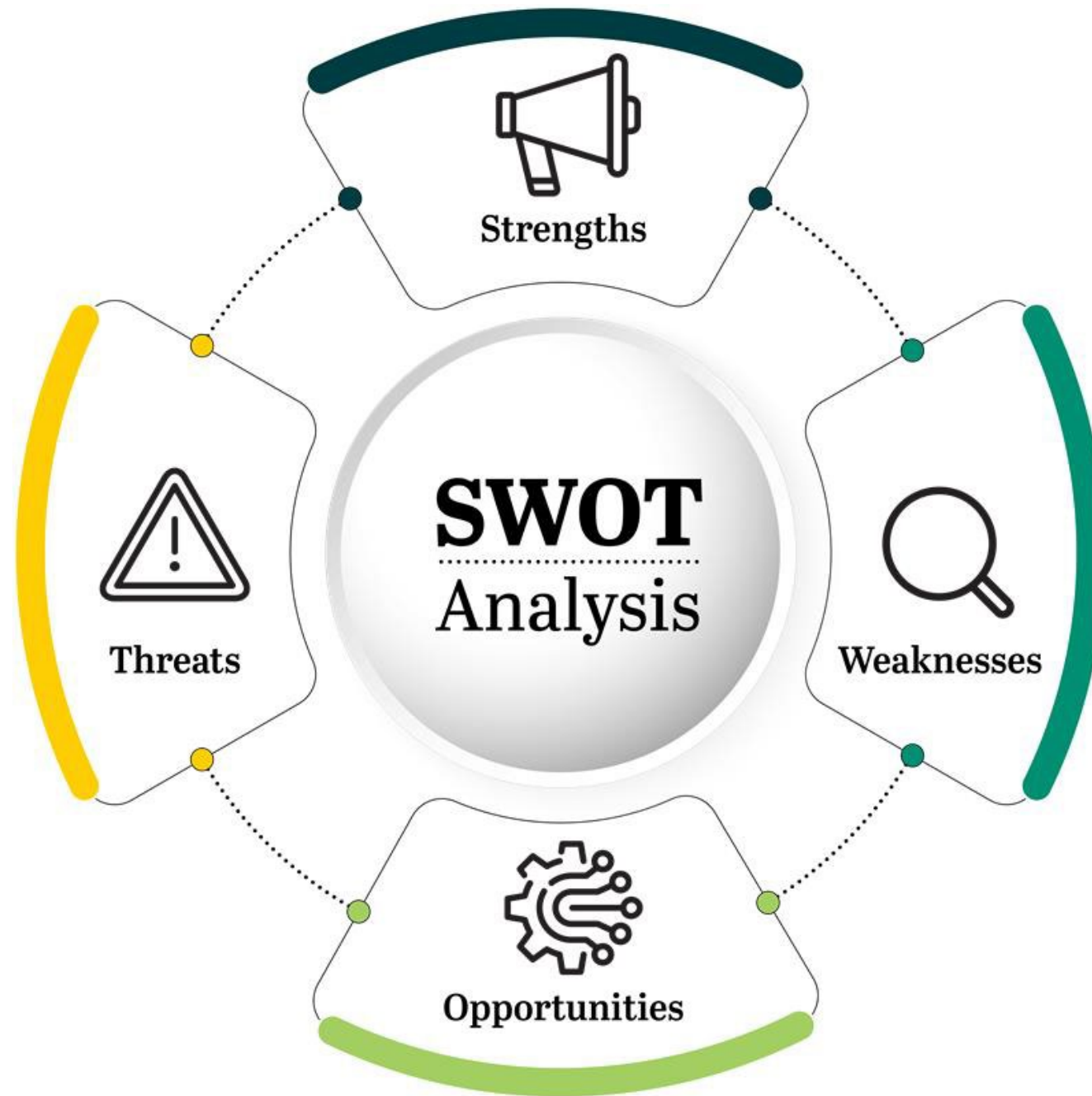


Berwyn Heights
2024 Total Expenditures



SWOT Analysis

SWOT Overview



Strengths

- Character, extensive trail and parks system, and strong sense of community make Berwyn Heights a diverse **“community of choice”** for families in Prince George’s County
- Town holds multiple well-attended gatherings and **community events** throughout the year
- Most corridor commercial spaces are **well-occupied** and command **high rents** relative to County averages; vacancy is very low
- Low crime rates are a testament to Town’s commitment to a **community policing** approach
- Proximity to major anchors like the University of Maryland make the Town **desirable** and well-positioned to **capture more market share**
- Town leaders are already collaborating with other communities to **share resources and ideas** through the Four Cities Coalition



Weaknesses

- Low built density relative to zoning potential, combined with strong retail performance indicates that corridor real estate is **not performing to its full market potential**
- Town is **over-reliant on residential tax base**, due to constrained commercial and industrial growth
- No distinct **“identity”** between the Berwyn Heights and Greenbelt sides of the Greenbelt Road corridor
- There are **few locally owned independent businesses** along Greenbelt Road; most retail and office spaces are occupied by national chains
- **Housing stock is aging and lacks variety**; there are few options for renters and/or smaller, lower-income households



Threats

- **Limited local staff capacity** to lead economic/business development and future planning
- If supply continues to lag demand, cost of living in Berwyn Heights could become **unaffordable** for middle-income families
- Berwyn Heights is **losing market share** to neighboring jurisdictions due to lack of family-friendly amenities and retail/dining options
- Lack of **safe pedestrian and bike connections** along Ballew and Greenbelt deter foot traffic and create dangerous conditions
- Town growth is **constrained** by lack of available land*
- Property owners along both Ballew and Greenbelt have not proactively **engaged with Town leadership** about redevelopment opportunities



*Most of the sites in the study area are built out, and not listed for sale or lease at the time of this presentation

Opportunities

- Berwyn Heights is well-positioned to attract **new residents and outside investment**
- Encourage multifamily and “missing-middle” housing near corridors
- Redevelop underutilized sites along Greenbelt with a mix of uses, including medical office/lab space, to **grow and diversify tax base**
- Collaborate w/County partners and local property owners on corridor-wide efforts to **retain, expand, and attract diverse businesses** and uses to Berwyn Heights and adjacent communities
- Work with Prince George’s County EDC to strengthen Town **brand identity**
- Use Town-owned property to foster **small-business development and incubation**, activate public spaces





Redevelopment Potential Analysis

Redevelopment Potential Analysis Takeaways

- Analysis indicates that nearly 1 million square feet/22 acres (**~50% of the study area**) has **high redevelopment potential**
- Several high potential sites
- ~26 parcels, totaling **1.5 million square feet/34 acres**, have lot coverage below 30%, and are likely **underutilized**

Methodology

Using data from Costar and Prince George's County, this analysis identifies parcels/buildings that **have high, moderate, or low redevelopment potential**, based on the methodology below.

The Redevelopment Potential analysis uses a scoring system of 0 to 3. A parcel receives 1 point for each criteria:

- **Age of Buildings:** Building constructed or most recently renovated before 1970
- **Building Coverage:** Building occupies less than 30% of total parcel area
- **Land Value-Total Value Ratio:** Parcels that have a Land Value-Total Value ratio higher than 30%

Redevelopment potential for each parcel/building is then ranked as:

- **High Potential:** parcel/building meets all 3 criteria
- **Medium Potential:** parcel/building meets any 2 criteria
- **Low Potential:** parcel/building meets 0 or 1 criteria

This analysis is conducted for informational purposes only, to help the Town and property owners start to identify potential opportunities for redevelopment

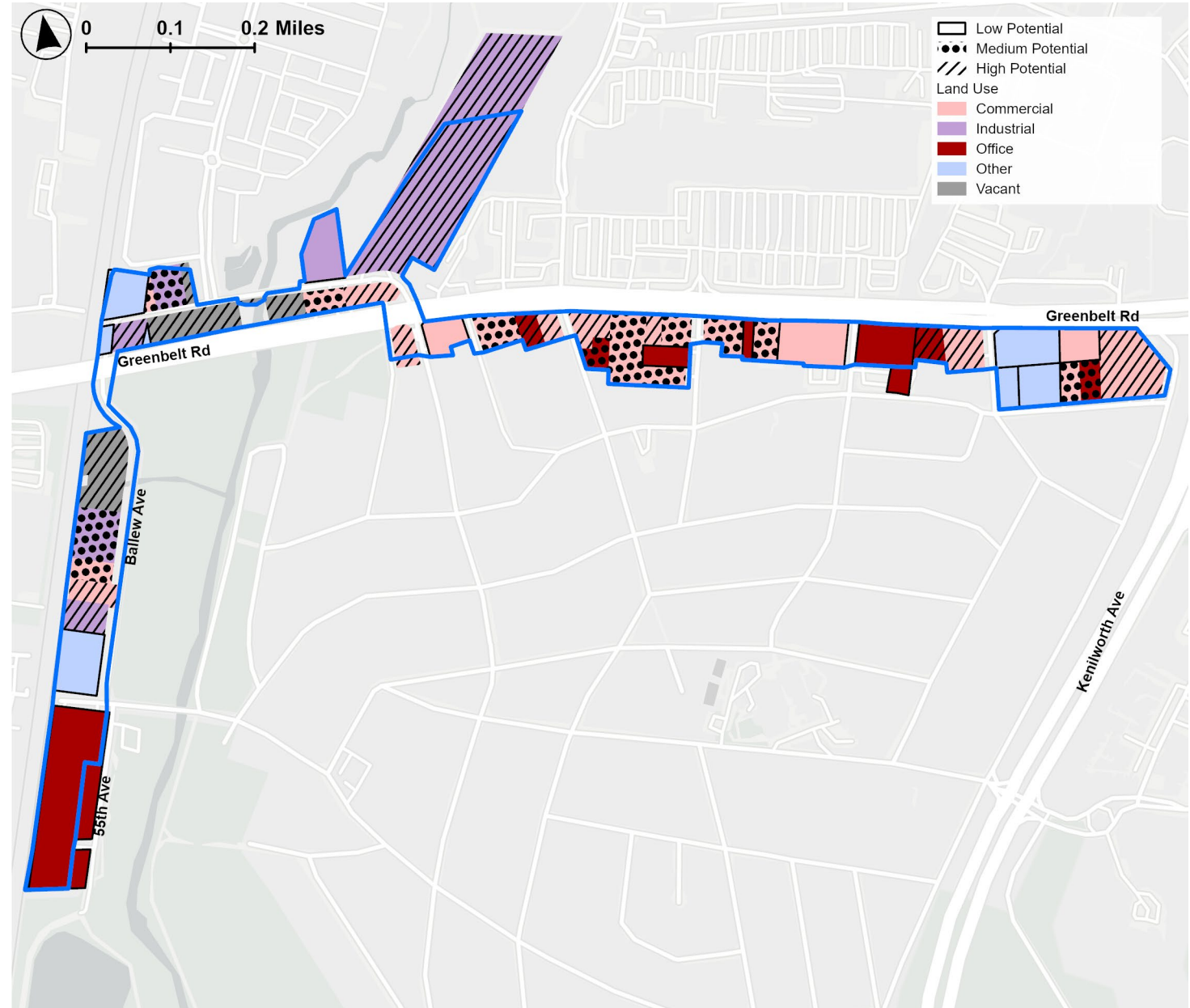
Redevelopment Potential Analysis

Study Area Corridor: Redevelopment Potential Data
Land Area (Square Feet) *

Land Use	Low Potential	Medium Potential	High Potential
Commercial	133.8 K SF (17.3%)**	259.2 K SF (67.9%)	262.7 K SF (26.5%)
Industrial	55.6 K SF (7.2%)	84.8 K SF (22.2%)	511 K SF (51.7%)
Office	341.3 K SF (43.9%)	37.6 K SF (9.9%)	43.05 K SF (4.3%)
Other*	245.9 K SF (31.6%)	-	-
Vacant	-	-	174.4 K SF (17.6%)
Total	777.5 K SF (100%)	381.5 K SF (100%)	991.1 K SF (100%)

*Other represents "Institutions" and "Transportation and Utilities" land uses

**% of total study area land



Source: AECOM. Data Layers: Planning Department of Prince George's County: Parcel_Py.
<https://gisdata.pgplanning.org/opendata/>. Data accessed February 2026.

Next Steps

- Prepare **report**, which will:
 - Outline **key takeaways** from market demand analysis and stakeholder engagement
 - Include **strategic recommendations and actionable strategies** for fostering sustainable, high-quality economic growth and development along the corridors
 - Recommend **strategy leads, partnerships, and sources of funding and financing** for implementation
- Draft plan review starts in **May**
- Targeting **June/July** for final report

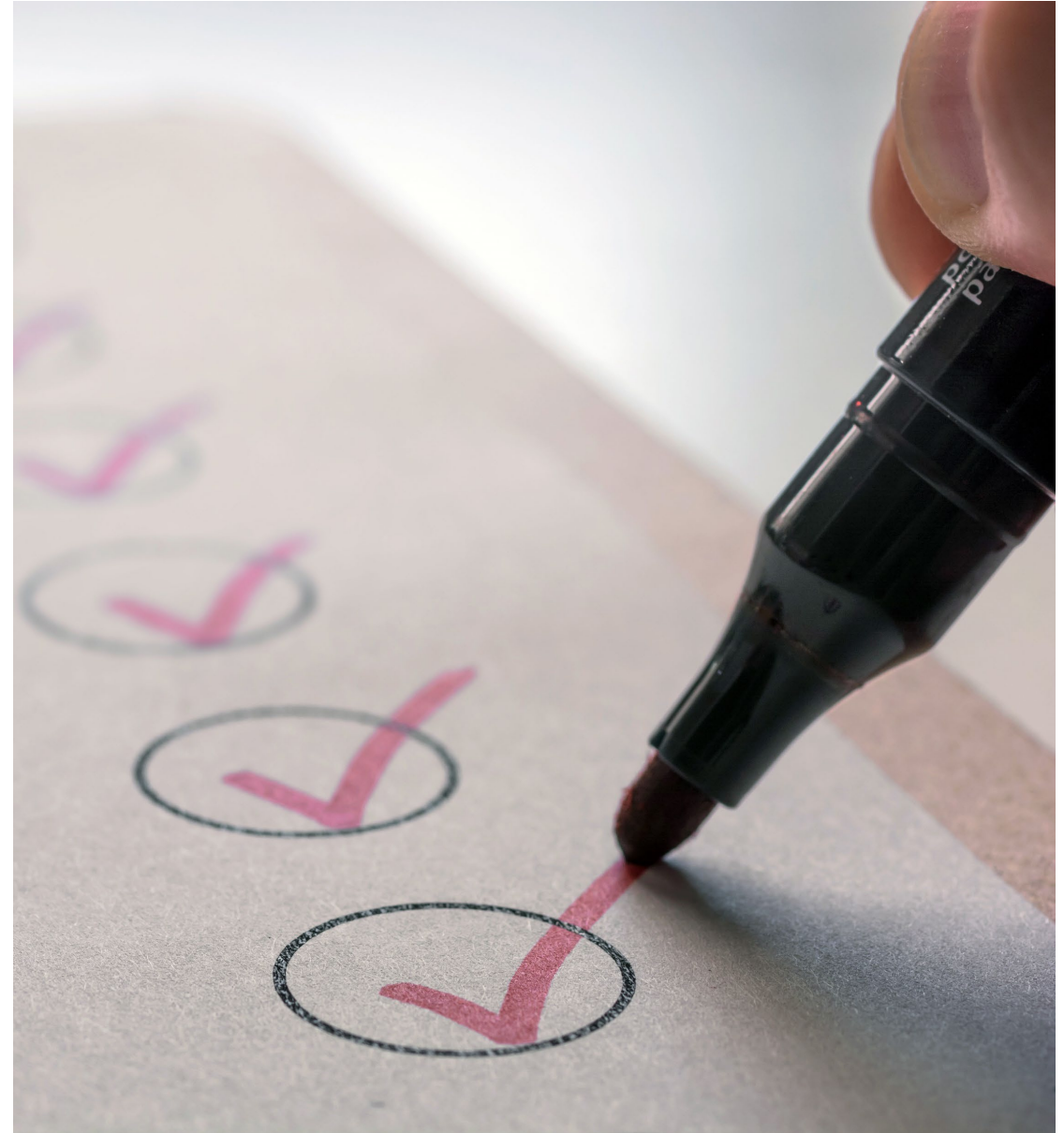


Image Source: Adobe Stock

Q&A

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