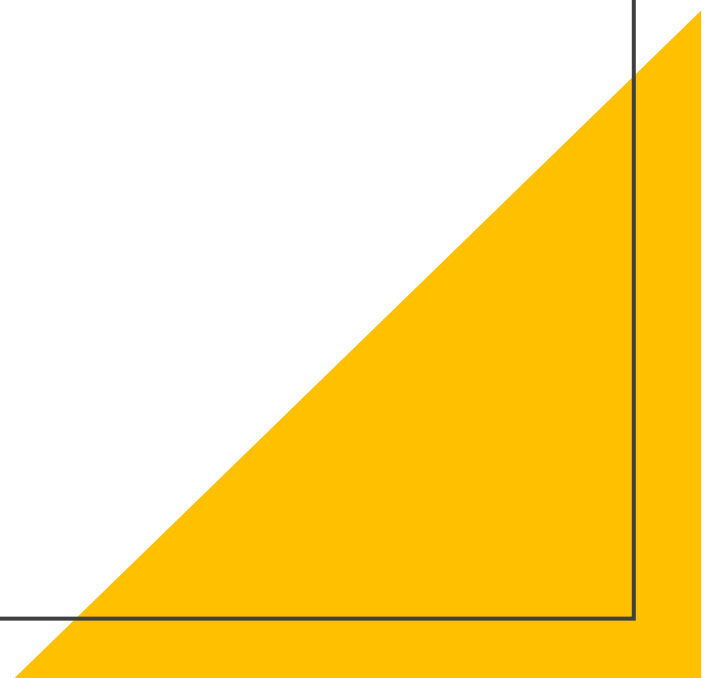


# Selected Growth and Development Metrics

November 2, 2023

James Cannistra, Information Management Division

Adam Dodgshon, Community Planning Division



# 2023 Round 10 Cooperative Forecast: Methodology

Forecasts are land use based and guided by the comprehensive plan.

The base year data for population and households include decennial census for population, households, the average household size, and group quarters population.

The base year employment is from the federal employment data and military base estimates via the best available sources.

Key planning factors are new construction, approved development, and land use capacity based on current zoning for residential and nonresidential development.

Prince George's County Planning Department, in partnership with Metropolitan Washington Council of Governments (MWCOG), developed Round 10 population, household, and employment forecasts for regional transportation planning purposes. The forecasts are fundamental for local comprehensive planning and functional planning initiatives.

# Cooperative Forecast – Regional Overview

## Round 10 Population, Household, and Employment Forecasts

Prince George's County:	2020	2025	2030	2035	2040	2045	2050	30-Year Growth	Percent Change
Population	967,201	997,790	1,032,963	1,081,732	1,122,712	1,159,591	1,193,750	226,549	23.42%
Household	342,216	353,735	367,432	385,948	400,542	413,702	425,909	83,693	24.46%
Employment	343,459	356,688	366,824	381,938	396,695	416,047	434,976	91,517	26.65%
The Ratio*	1.00	0.99	1.00	1.01	1.01	0.99	0.98		

MWCOG Region:	2020	2025	2030	2035	2040	2045	2050	30-Year Growth	Percent Change
Population	5,731,264	5,954,180	6,247,205	6,507,798	6,749,739	6,974,481	7,181,083	1,449,819	25.30%
Household	2,127,514	2,254,523	2,389,004	2,508,055	2,617,190	2,716,322	2,803,814	676,300	31.79%
Employment	3,169,247	3,356,922	3,549,888	3,737,282	3,881,722	4,024,571	4,156,611	987,364	31.15%
The Ratio*	0.671	0.672	0.673	0.671	0.674	0.675	0.675		

County's Share of Region's:	2020	2025	2030	2035	2040	2045	2050	30-Year Growth
Population	16.88%	16.76%	16.53%	16.62%	16.63%	16.63%	16.62%	15.63%
Household	16.09%	15.69%	15.38%	15.39%	15.30%	15.23%	15.19%	12.38%
Employment	10.84%	10.63%	10.33%	10.22%	10.22%	10.34%	10.46%	9.27%

\*: The household/employment ratio.

Metropolitan Washington Council of Governments and The Research Section, Information Management Division, Planning Department.

# Cooperative Forecast: Population and Households

2010 Census	2020 Census	Change 2010-20	2030 County Forecast	Change 2020-30
863,420 persons	967,201	103,781 (12.02%)	1,032,963	65,762 6.8%

## Households

2010 Census	2020 Census	Change 2010-20	2030 County Forecast	Change 2020-30
304,042	342,216	38,174 12.56%	367,432	25,216 7.37%

Note General Plan indicated approx. 63,000 new dwelling units by 2035

# Prince George's County Employment

- *Prince George's County has been leading the state in job growth, followed by Anne Arundel and Montgomery Counties. Between 2011 and 2021, the County's growth in total employment, 55,182, was the largest among all 24 jurisdictions in Maryland, representing 17.28% of the state's total growth (55,182 out of 319,380). Additionally, the County's percent change in employment between 2011 and 2021 considerably surpassed Montgomery and Baltimore Counties that were previously the lead in the state's total employment. It is worth noting that some relatively small or rural counties grew more rapidly (in terms of % change) in employment than the large jurisdictions in the state.*

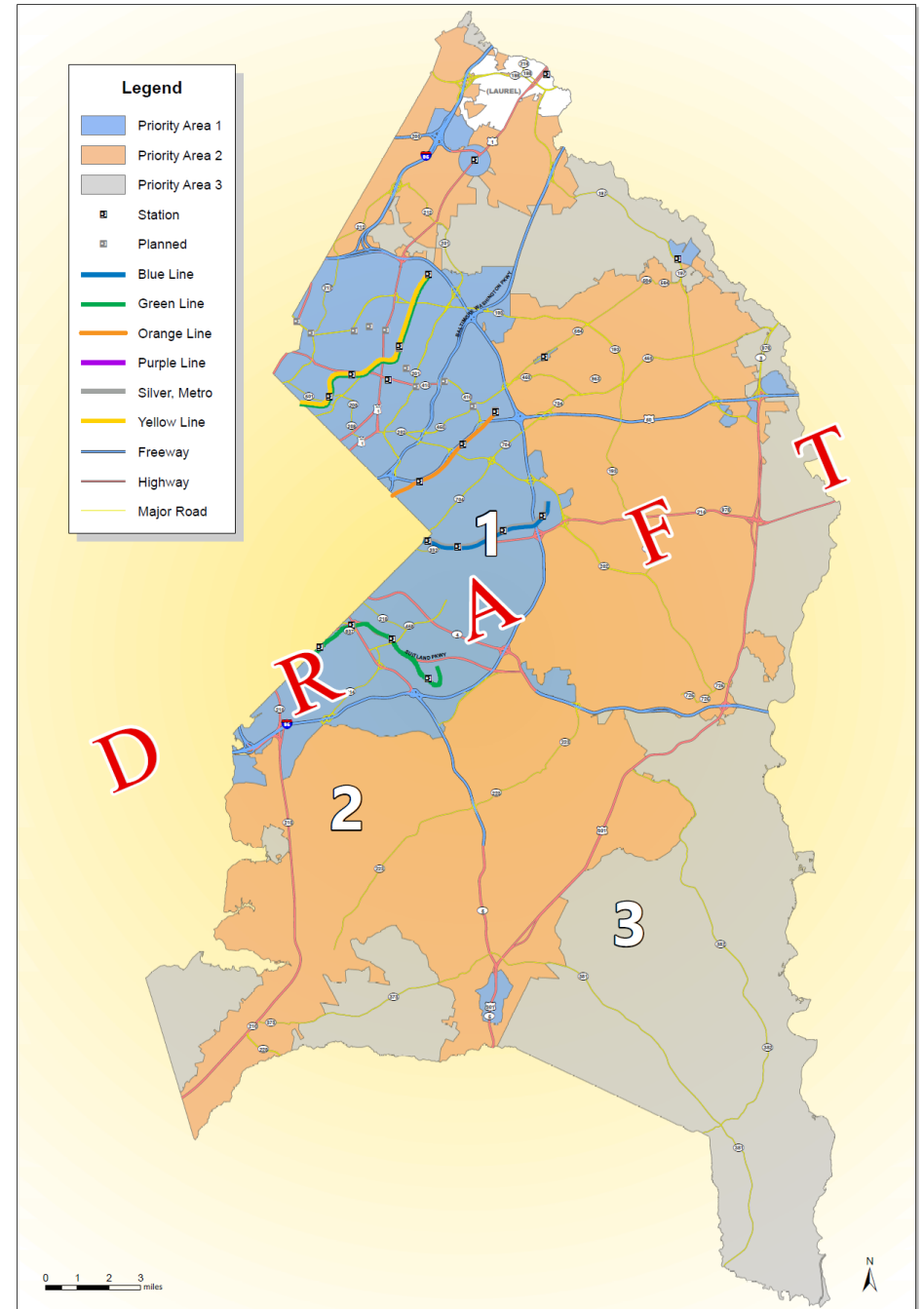
\* Source: Employment Trend and Dynamics – Pending Report Prince George's County Planning Department

# Draft Priority Areas

Area 1 – Inside the Beltway, **and** all Plan 2035 Centers (regardless of their location)

Area 2 – Outside the Beltway, **within** Plan 2035 Growth Policy Boundary

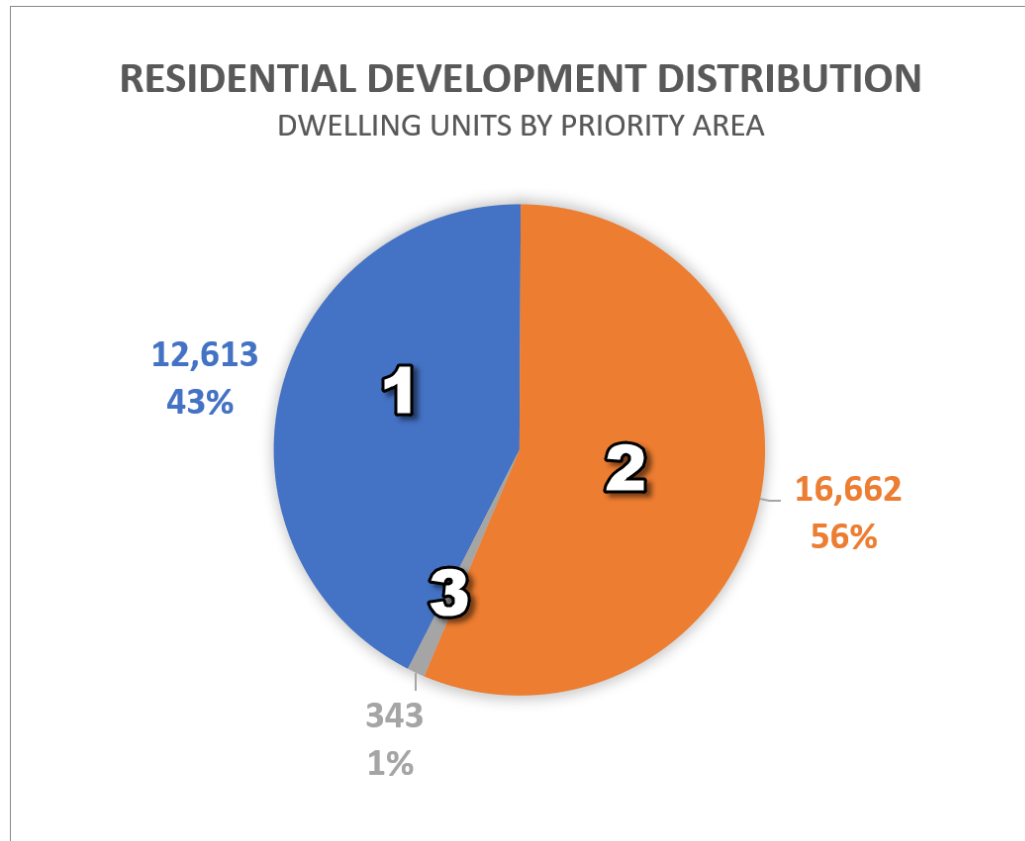
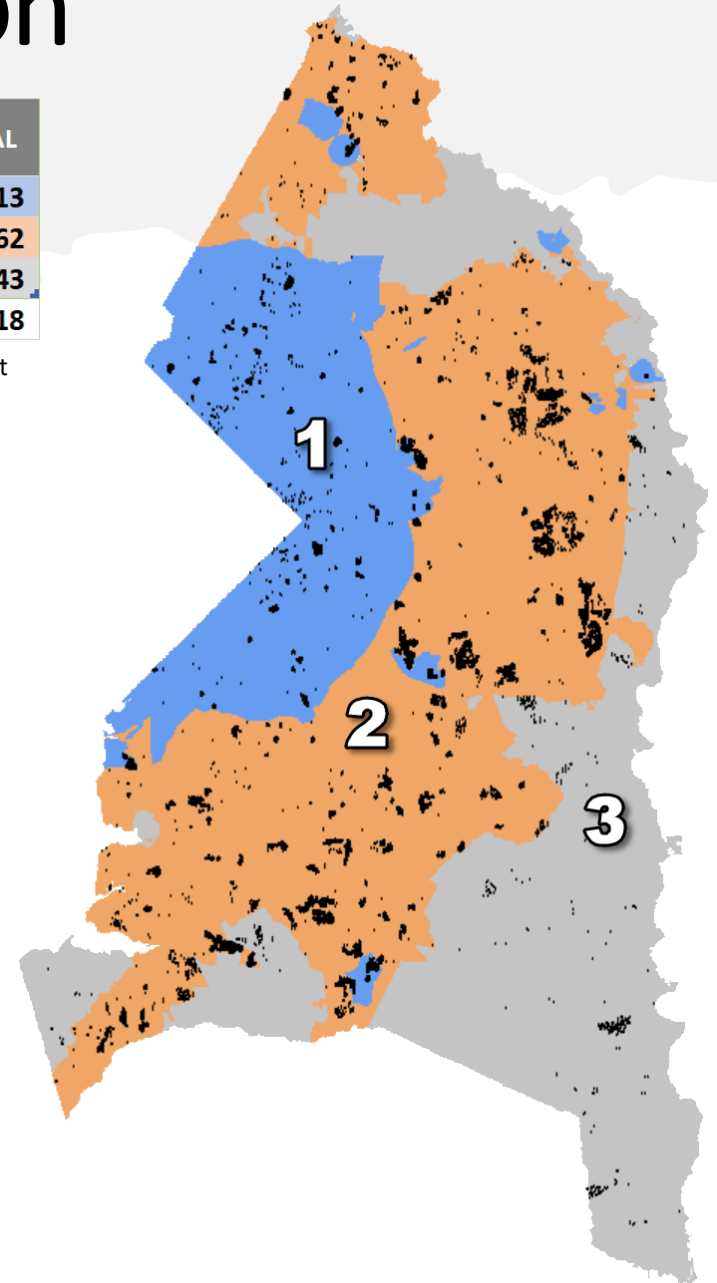
Area 3 – Outside Plan 2035 Growth Policy Boundary (“Rural and Agricultural”)



# Residential Development Distribution

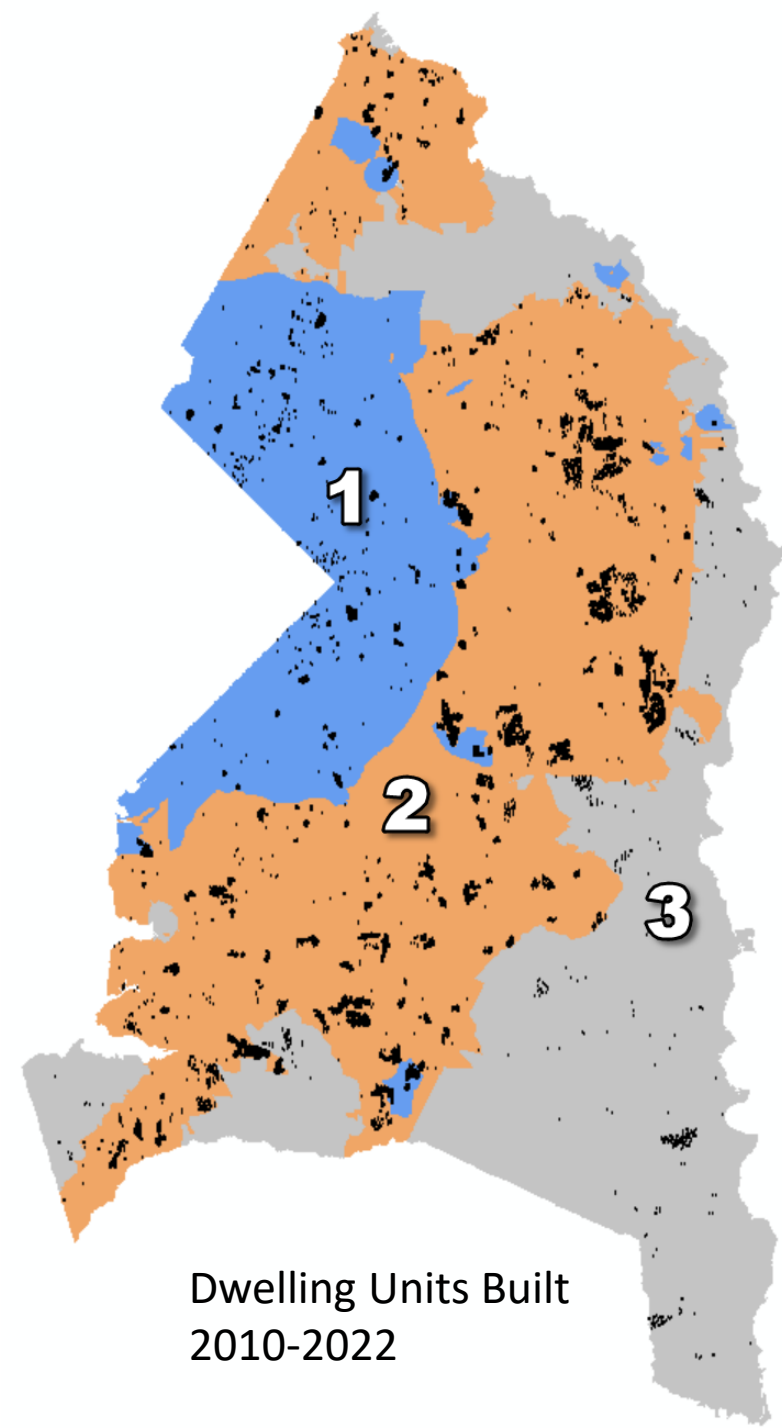
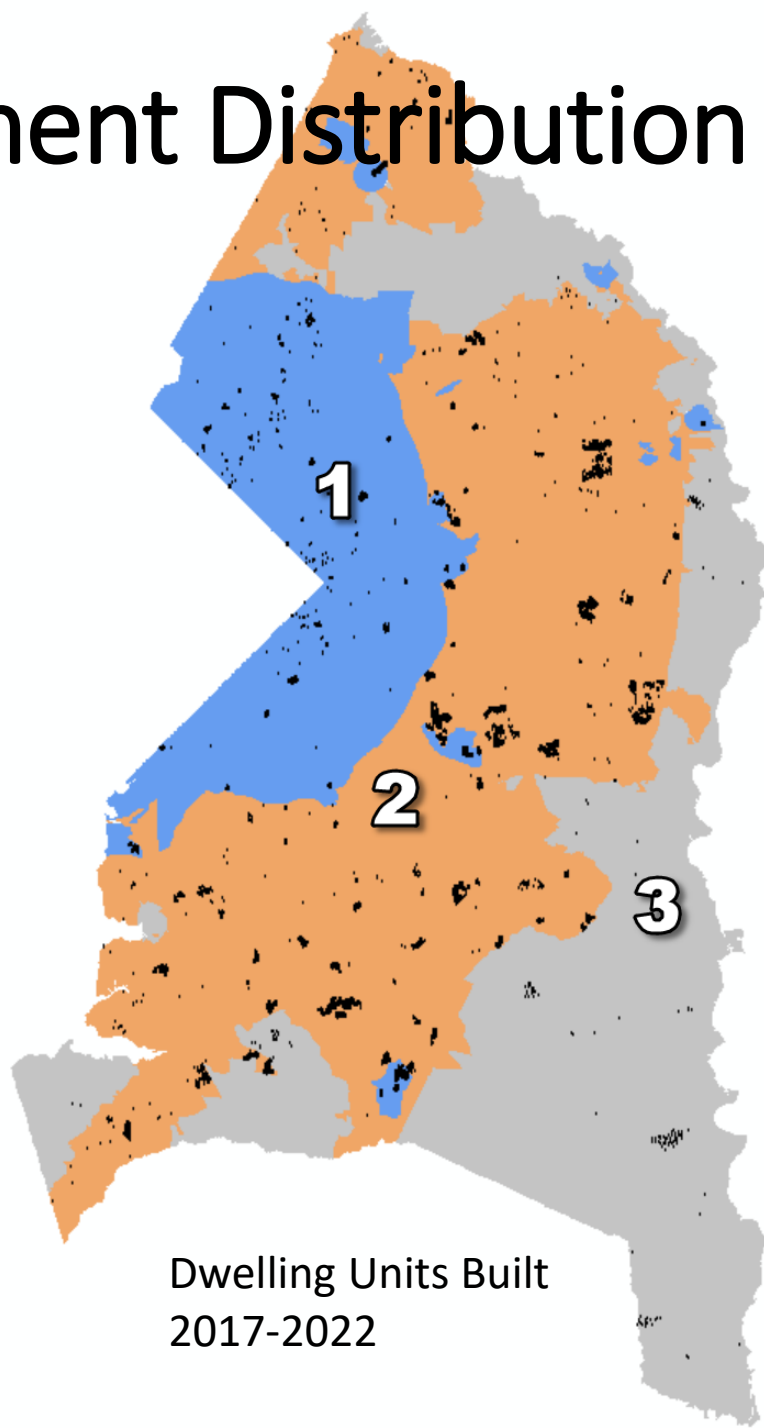
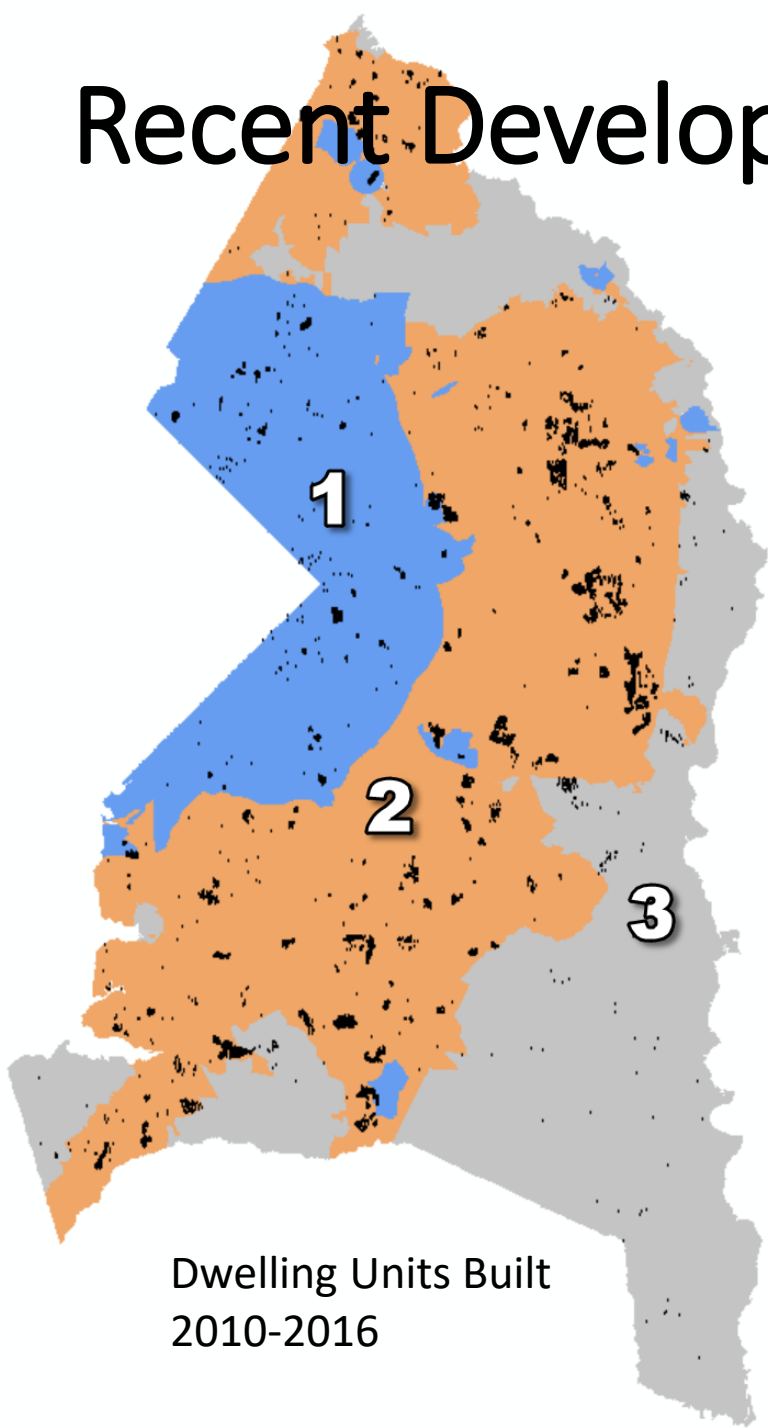
PRIORITY AREA	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	TOTAL
1	593	443	229	949	684	2,093	1,723	1,352	1,196	1,199	504	436	1,212	12,613
2	975	1,226	824	1,077	1,110	1,334	1,924	1,228	1,434	1,551	1,552	1,414	1,013	16,662
3	19	20	17	42	25	48	20	21	27	24	32	26	22	343
ALL	1,587	1,689	1,070	2,068	1,819	3,475	3,667	2,601	2,657	2,774	2,088	1,876	2,247	29,618

Source: Planning Department Property INFO & SDAT Year Built



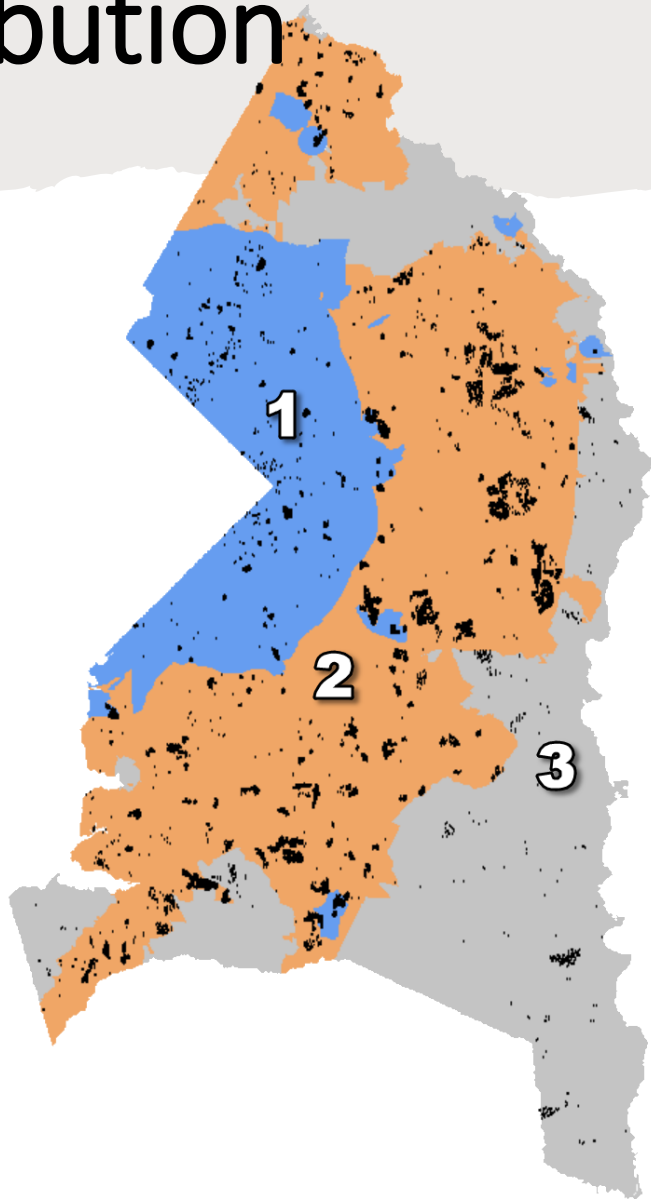
Source: SDAT and Planning Property Info File – Year Built

# Recent Development Distribution





# Recent Development Distribution



Dwelling Units Built	2010 - 2022, Prince George's County		
	DUs BUILT 2010-16	DUs BUILT 2017-22	TOTAL DUs BUILT 2010-22
<b>Priority Area 1</b>	<b>6,714</b>	<b>5,899</b>	<b>12,613</b>
<b>Inside Centers</b>	<b>4,611</b>	<b>4,133</b>	<b>8,744</b>
Addison Road Metro	58	1	59
Annapolis Road/Glenridge	1	-	1
Beacon Heights	-	-	-
Bowie	-	140	140
Bowie State University MARC	-	-	-
Branch Avenue Metro	600	1	601
Brandywine	152	657	809
Capitol Heights Metro	-	-	-
Cheverly Metro	-	-	-
College Park/UM Metro/M Square	-	-	-
Greenbelt Metro	-	-	-
Konterra	-	-	-
Landover Gateway	345	134	479
Landover Metro	-	358	358
Largo Town Center Metro	318	553	871
Morgan Boulevard Metro	131	47	178
Muirkirk MARC	622	369	991
National Harbor	-	-	-
National Harbor	543	411	954
Naylor Road Metro	-	-	-
New Carrollton Metro	-	300	300
Oxon Hill	-	-	-
Port Towns	-	3	3
Prince George's Plaza Metro	289	140	429
Riverdale MARC	309	104	413
Riverdale Park	-	-	-
Seabrook MARC	-	-	-
Southern Avenue Metro	1	-	1
Suitland Metro	-	337	337
Takoma/Langley Crossroads	-	-	-
UMD Center	264	-	264
UMD East	649	8	657
UMD West	256	-	256
West Hyattsville Metro	-	179	179
Westphalia Center	73	391	464
<b>Outside Centers, Inside Beltway</b>	<b>2,103</b>	<b>1,766</b>	<b>3,869</b>
<b>Priority Area 2</b>	<b>8,470</b>	<b>8,192</b>	<b>16,662</b>
<b>Priority Area 3</b>	<b>191</b>	<b>152</b>	<b>343</b>
<b>TOTAL Dwelling Unit Built</b>	<b>15,375</b>	<b>14,243</b>	<b>29,618</b>

Source: Tax Assessor Data; M-NCPPC

# Development Capacity Methodology



Start with undeveloped properties



Subtract properties that are fully constrained:

Tax Exempt Properties and Public Lands

Properties that already have vested development rights (approved plans, final plats).

Other constraints (Utility easements and ROWs, common areas, cemeteries, etc.)



Subtract properties that are more than 50% constrained by environmental factors (floodplains, steep slopes, poor soils, etc.)



Multiply remaining property acreage by the zoning density allowed by the zoning ordinance.

Residential: Units per Acre

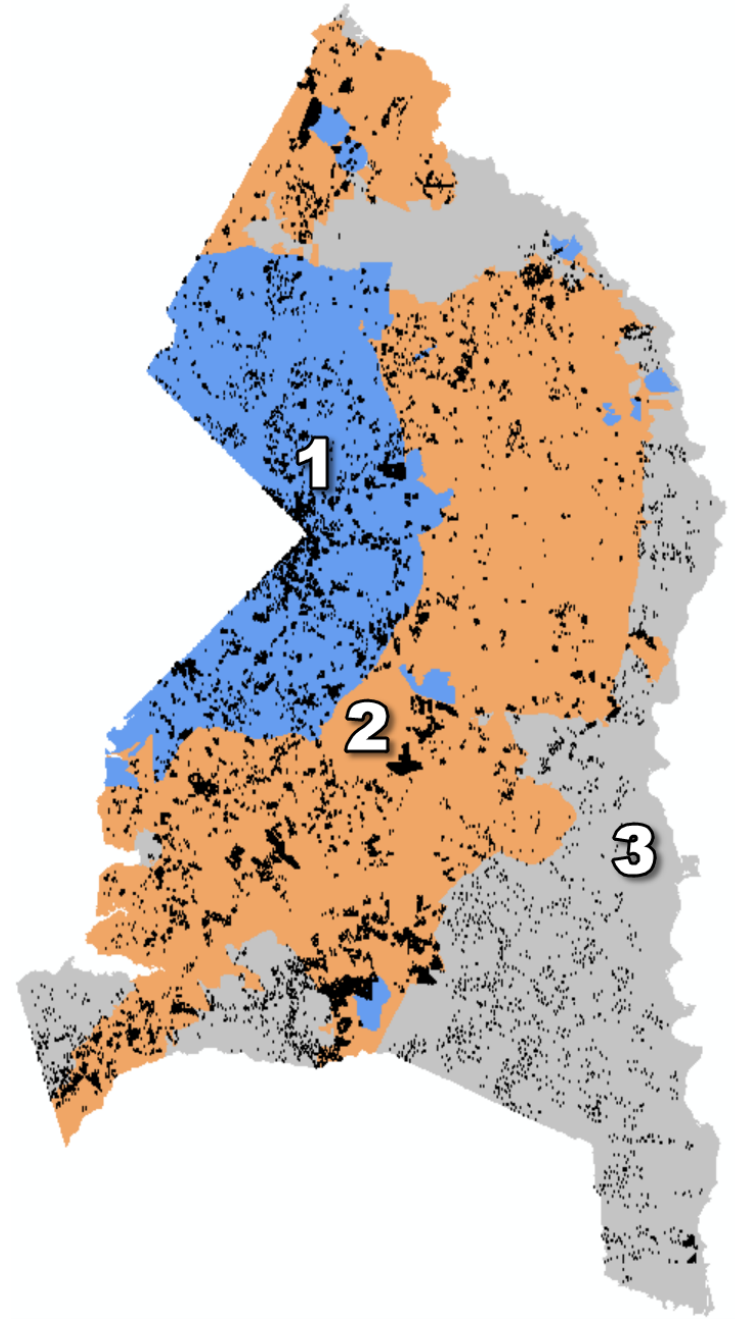
Non-residential: Floor Area Ratio (FAR)



Range of allowable densities in zones produces a range of outcomes.

# Estimated Development Capacity

48,550 – Low  
60,053 – Medium

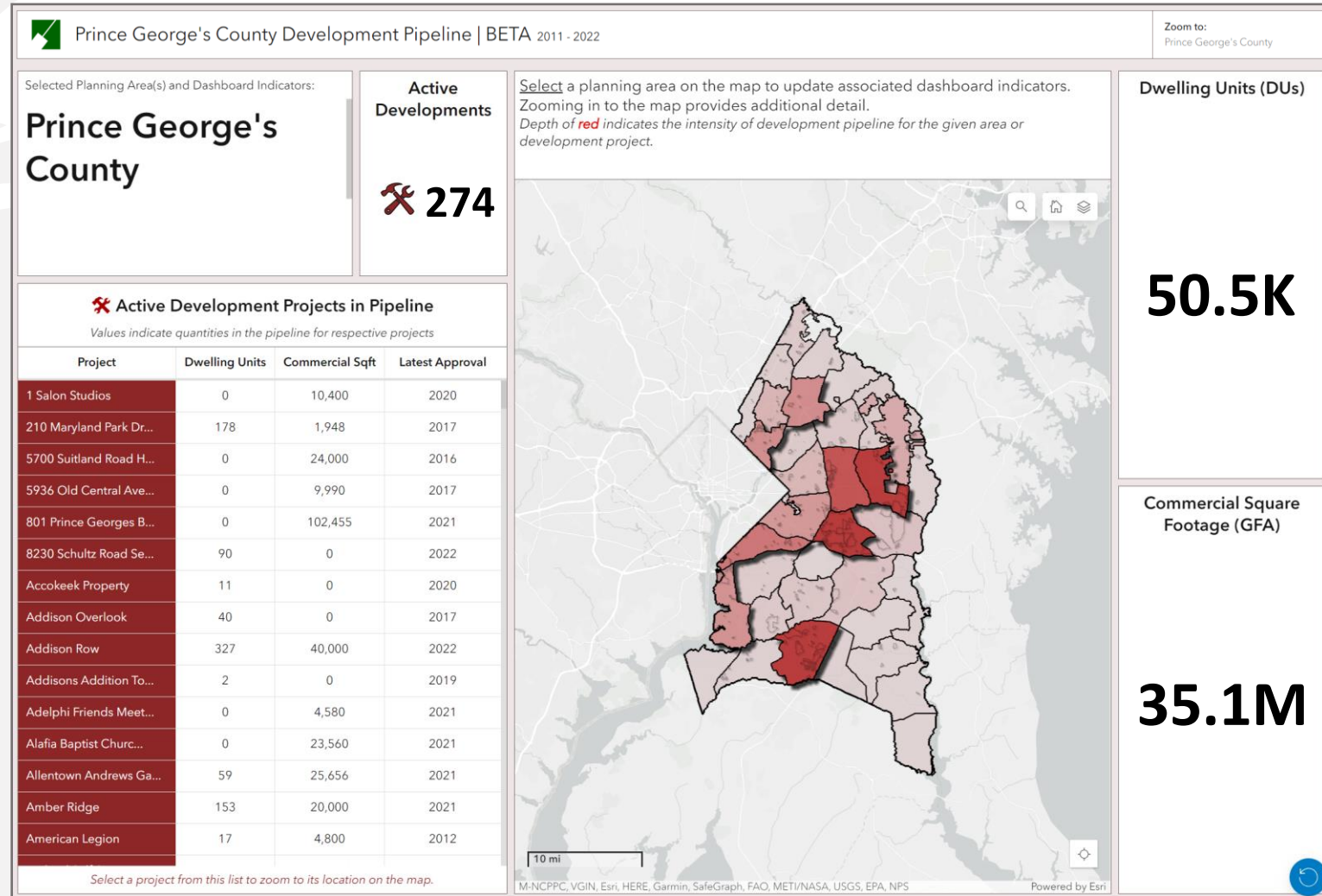


Dwelling Unit Development Capacity		2023, Prince George's County	
PRIORITY AREAS	DU CAPACITY LOW	DU CAPACITY MEDIUM	
<b>Priority Area 1</b>	<b>19,039</b>	<b>30,065</b>	
<b>Inside Centers</b>	<b>5,013</b>	<b>13,927</b>	
Addison Road Metro	150	296	
Annapolis Road/Glenridge	50	75	
Beacon Heights	23	48	
Bowie	3	20	
Bowie State University MARC	32	66	
Branch Avenue Metro	121	219	
Brandywine	182	346	
Capitol Heights Metro	176	385	
Cheverly Metro	82	248	
College Park/UM Metro/M Square	-	-	
Greenbelt Metro	12	25	
Konterra	654	3,861	
Landover Gateway	1,377	4,562	
Landover Metro	22	59	
Largo Town Center Metro	281	705	
Morgan Boulevard Metro	187	358	
Muirkirk MARC	463	469	
National Harbor	-	-	
Naylor Road Metro	120	315	
New Carrollton Metro	73	164	
Oxon Hill	225	470	
Port Towns	81	113	
Prince George's Plaza Metro	-	-	
Riverdale MARC	170	176	
Riverdale Park	84	173	
Seabrook MARC	30	63	
Southern Avenue Metro	152	219	
Suitland Metro	118	118	
Takoma/Langley Crossroads	32	62	
UMD Center	-	-	
UMD East	27	49	
UMD West	17	48	
West Hyattsville Metro	58	144	
Westphalia Center	11	71	
<b>Outside Centers, Inside Beltway</b>	<b>14,026</b>	<b>16,138</b>	
<b>Priority Area 2</b>	<b>26,656</b>	<b>27,104</b>	
<b>Priority Area 3</b>	<b>2,855</b>	<b>2,884</b>	
<b>TOTAL Dwelling Unit Capacity</b>	<b>48,550</b>	<b>60,053</b>	

Source: Tax Assessor Data; M-NCPPC

# Pipeline Estimates & Dashboard

- Planning Areas Summaries
  - Color depth represents pipeline intensity
- Approved Cases
  - Cases (DSP, CSP, SDP, Preliminary Plans)
  - Cases Aggregated to Projects
  - Many active projects have 50+ cases
- Review of Permits and Imagery for status
- Caveats
  - 2011 – 2022 timeframe
  - Validity issues
  - Historic approved plats
  - Variable timeliness of sources
- Beta Application
  - <https://mncppc.maps.arcgis.com/apps/dashboard/index.html?appid=834ab8aeca624b6a8a2617fbd23ca4aa>



# Pipeline Estimates by Planning Area

Selected Planning Area(s) and Dashboard Indicators:

**Brandywine & Vicinity**

**Active  
Developments**

 **19**

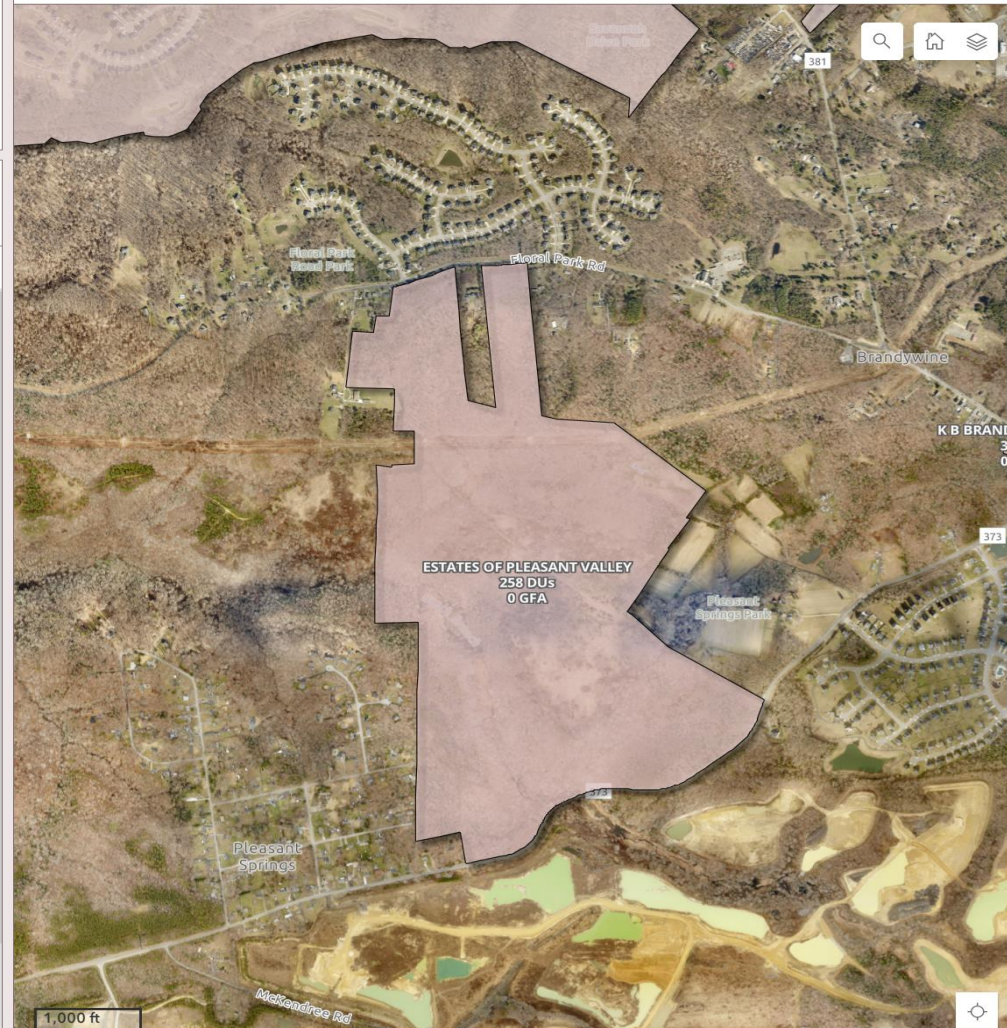
Select a planning area on the map to update associated dashboard indicators. Zooming in to the map provides additional detail.  
Depth of red indicates the intensity of development pipeline for the given area or development project.

## Active Development Projects in Pipeline

Values indicate quantities in the pipeline for respective projects

Project	Dwelling Units	Commercial Sqft	Latest Approval
Branch Avenue M-x-t	516	837,487	2022
Brandywine Commercia...	0	152,175	2021
Brandywine Crossing	482	0	2022
Brandywine Village	0	358,995	2022
Brandywood Estates	7	0	2011
Calm Retreat	488	20,000	2022
Dobson Ridge	196	0	2021
Elp Dc	0	3,240,000	2021
Enclave At Brandywin...	104	0	2021
Estates Of Pleasant ...	258	0	2012
Fallen Oaks Townhome...	44	9,300	2021
K B Brandywine Land	3	0	2014
Lusbys Lane	30	0	2021
Michael's View	10	0	2012
Piscataway Heights	67	0	2011
Stephen's Crossing A...	1,408	300,000	2022
Three Roads Corner	0	4,466	2021

Select a project from this list to zoom to its location on the map.

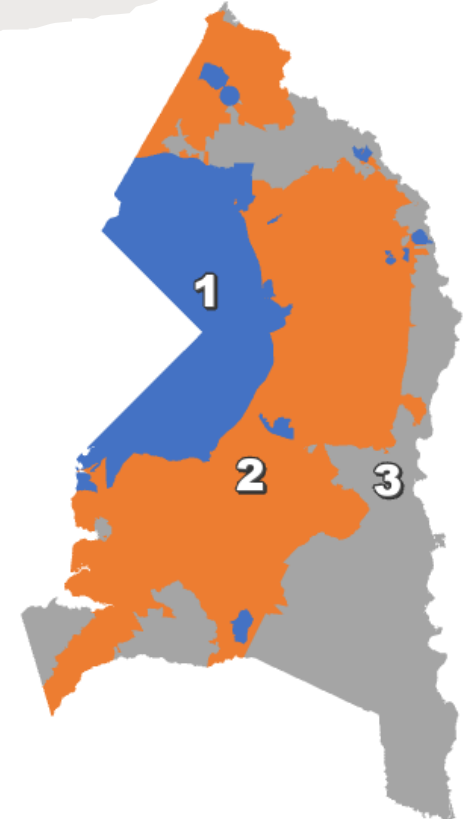
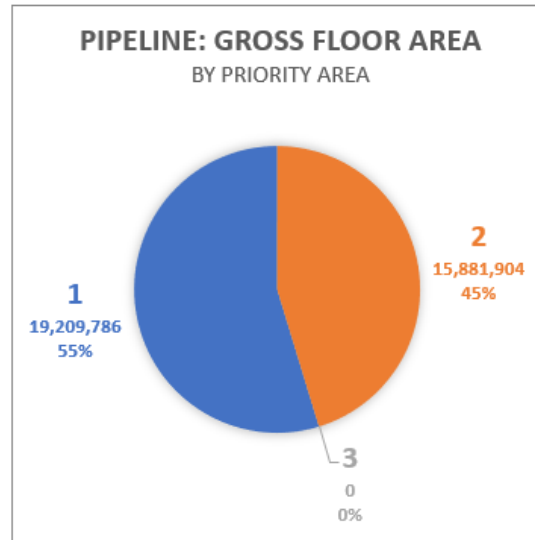
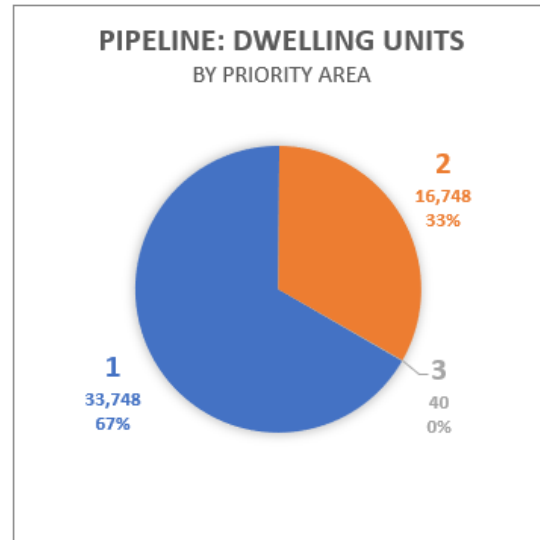
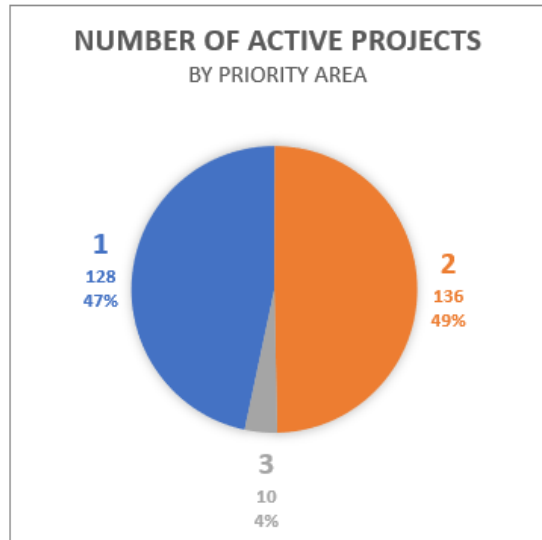


# Pipeline by Priority Area

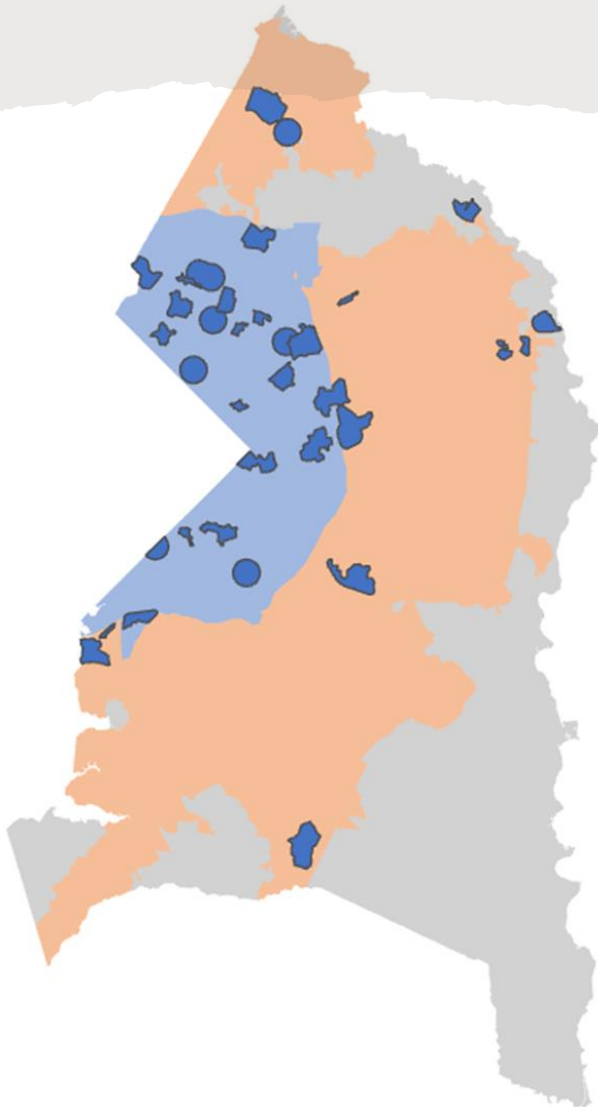
## Development Pipeline by Priority Area

Priority Area	Number of Active Projects	Pipeline: Dwelling Units	Pipeline: Gross Floor Area (Sqft)
1	128	33,748	19,209,786
2	136	16,748	15,881,904
3	10	40	0
County	274	50,536	35,091,690

Development Pipeline data derived from development cases approved between January 2011 and August 2022.

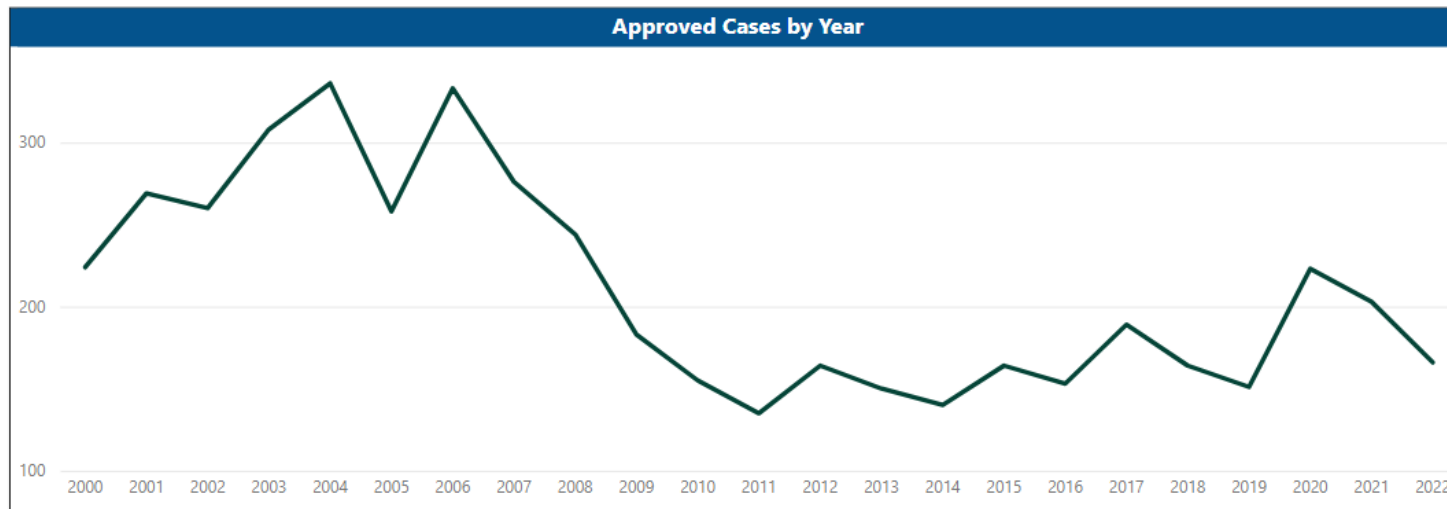
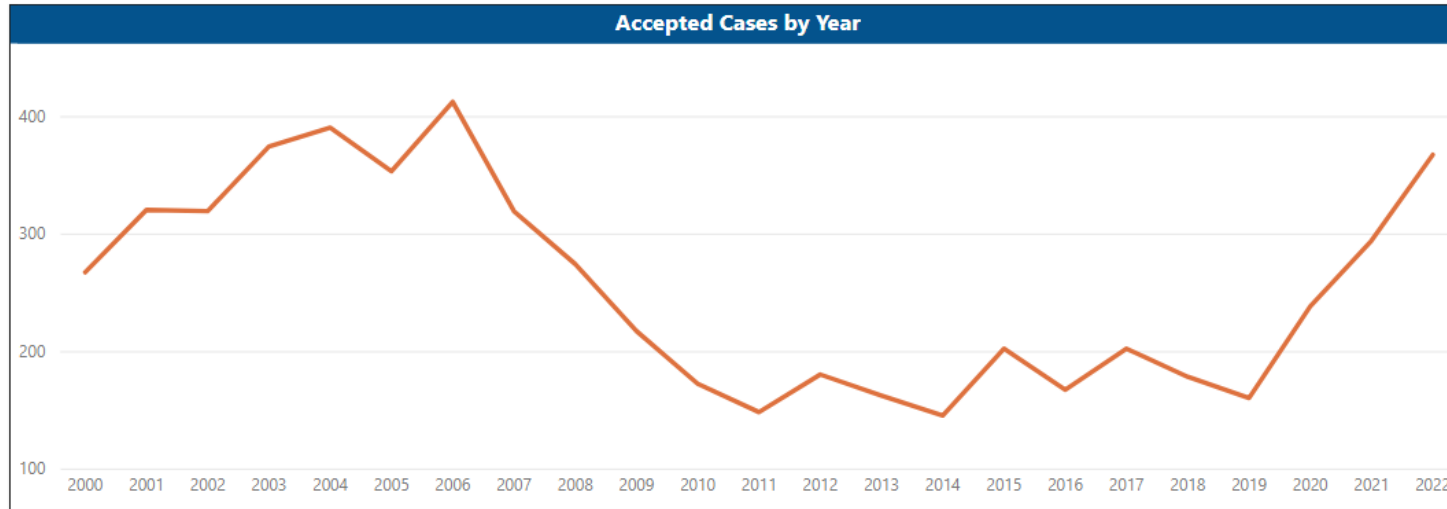


# Active Pipeline Projects: Inside Beltway and Centers



Active Pipeline Projects Data	Pipeline	
Plan2035 Centers	Res Units	GFA
<b>Campus Centers</b>	<b>1,090</b>	<b>83,743</b>
UMD East/Center (Future Purple Line)	1,090	83,743
<b>Local Transit Centers</b>	<b>1,620</b>	<b>1,691,927</b>
Addison Road Metro	193	10,977
Capitol Heights Metro	549	22,700
Landover Metro	0	0
Morgan Boulevard Metro	19	0
Naylor Road Metro	0	1,643,250
Takoma/Langley Crossroads	0	0
UMD West	0	0
West Hyattsville Metro	859	15,000
<b>Neighborhood Centers</b>	<b>1,981</b>	<b>85,893</b>
Annapolis Road/Glenridge (Future Purple Line)	2	0
Beacon Heights (Future Purple Line)	224	13,960
Muirkirk MARC	0	0
Oxon Hill	0	8,247
Port Towns	6	19,067
Riverdale MARC (Possible Future)	717	0
Riverdale Park (Future Purple Line)	0	0
Seabrook MARC (Possible Future)	0	4,950
Southern Avenue Metro	1,032	39,669
<b>Regional Transit Districts</b>	<b>10,489</b>	<b>7,017,937</b>
Branch Avenue Metro	208	264,560
College Park/UM Metro/M Square Purple Line	451	937,194
Greenbelt Metro	0	0
Largo Town Center Metro	4,674	2,527,051
National Harbor	1,547	2,139,897
New Carrollton Metro	840	857,465
Prince George's Plaza Metro	1,934	17,099
Suitland Metro	835	274,671
<b>Town Centers</b>	<b>9,842</b>	<b>6,814,057</b>
Bowie	1,793	362,831
Brandywine	1,908	531,170
Konterra	220	0
Landover Gateway	1,197	5,056
Westphalia Center	4,724	5,915,000
<b>Total</b>	<b>25,022</b>	<b>15,693,557</b>

# Development Applications



Note: only completed years are displayed.

## Trend Chart Filters

### Case Type

- AC
- ADQ
- AMEND
- CBCA
- CDP
- CSKP
- CSP
- DDS
- DPLS
- DSDS
- DSP
- FDP
- FINAL
- MR
- NCCF
- NCGS
- NCU
- NRI
- PRELIM
- ROSP
- SA
- SDP
- SE
- SKETCH
- SPECPERM
- TCP\_EX
- TCP\_I
- TCP\_II
- TDP
- TDS
- VACATION
- ZMA

### Community

- (Blank)
- ACCOKEEK
- ADELPHI
- AQUASCO
- BELTSVILLE
- BERWYN HEIGHTS
- BLADENSBURG
- BOWIE
- BRANDYWINE
- BRENTWOOD
- CALVERTON
- CAMP SPRINGS
- CAPITOL HEIGHTS
- CHELTENHAM
- CHEVERLY
- CHILLUM
- CLINTON
- COLLEGE PARK
- COLMAR MANOR
- COTTAGE CITY
- DISTRICT HEIGHTS
- FAIRMOUNT HEIGHTS
- FOREST HEIGHTS

### Councilmanic District

All

### Planning Area

All



# Permits

Search Permit #	Commercial/Residential	Council District (M-NCPPC)	Zoning (M-NCPPC)	Building Use (M-NCPPC)	1666 Total Permits
Search <input type="text"/>	All <input type="text"/>	All <input type="text"/>	All <input type="text"/>	All <input type="text"/>	

### Database View

Permit Number	Permit Type	Tax Account	Application Date	Issuance Date	Use and Occupancy Issue Date	Close Final Date	Address
19485-2021-1	Residential	3932597	Wednesday, January 26, 2022	Thursday, March 03, 2022	Monday, June 06, 2022	Monday, June 06, 2022	5806 EAST WILLIAMSON COURT
20650-2021-1	Residential	5631404	Thursday, January 27, 2022	Tuesday, February 08, 2022	Monday, August 29, 2022	Tuesday, August 30, 2022	1306 COUGAR LANE
44106-2021-1	Residential	3932910	Tuesday, February 08, 2022	Friday, March 11, 2022			5806 MCINTOSH PLACE
44079-2021-1	Residential	3932886	Tuesday, February 08, 2022	Friday, March 11, 2022	Thursday, October 27, 2022	Thursday, October 27, 2022	5814 MCINTOSH PLACE
44117-2021-1	Residential	3932944	Tuesday, February 08, 2022	Friday, March 11, 2022	Monday, September 12, 2022	Monday, September 12, 2022	5800 MCINTOSH PLACE
19515-2021-1	Residential	3932639	Wednesday, January 26, 2022	Monday, February 28, 2022	Thursday, June 23, 2022	Thursday, June 23, 2022	5801 EAST WILLIAMSON COURT
13084-2022-1	Residential	5711472	Tuesday, June 07, 2022	Friday, September 02, 2022			9630 WESHIRE DRIVE
13087-2022-1	Residential	5711483	Tuesday, June 07, 2022	Friday, September 02, 2022			9632 WESHIRE DRIVE
13089-2022-1	Residential	5711494	Tuesday, June 07, 2022	Friday, September 02, 2022			9634 WESHIRE DRIVE
19611-2021-1	Residential	3932498	Wednesday, January 26, 2022	Thursday, March 03, 2022	Monday, August 22, 2022	Monday, August 22, 2022	5904 SAVANNAH DRIVE
15353-2021-1	Residential	3932555	Wednesday, January 26, 2022	Thursday, March 03, 2022	Thursday, June 23, 2022	Thursday, June 23, 2022	6001 SAVANNAH DRIVE
19608-2021-1	Residential	3932670	Wednesday, January 26, 2022	Thursday, March 10, 2022	Friday, July 15, 2022	Friday, July 15, 2022	5811 EAST WILLIAMSON COURT
18775-2021-1	Commercial	5694148	Monday, April 11, 2022	Tuesday, May 31, 2022	Friday, June 30, 2023	Friday, June 30, 2023	4210 PARLIAMENT PLACE
18022-2021-1	Commercial	0316976	Wednesday, June 01, 2022	Tuesday, August 02, 2022			9596 LIVINGSTON ROAD
30769-2021-1	Commercial	2384527	Wednesday, March 02, 2022	Tuesday, March 29, 2022			4205 KNOX ROAD
2323-2021-1	Residential	5525985	Tuesday, June 28, 2022	Monday, September 12, 2022			8500 FINBAR DRIVE
32859-2021-1	Residential	5680175	Monday, February 14, 2022	Friday, March 04, 2022	Wednesday, August 31, 2022	Wednesday, August 31, 2022	16356 FIFE WAY
32844-2021-1	Residential	5680120	Monday, February 14, 2022	Monday, March 21, 2022	Thursday, October 13, 2022	Thursday, October 13, 2022	16368 FIFE WAY
32873-2021-1	Residential	5680200	Monday, February 14, 2022	Friday, March 04, 2022	Thursday, September 01, 2022	Thursday, September 01, 2022	16350 FIFE WAY

### Select a Date Range

Y Q M W D

Year

2022 - 2022

2013

2014

2015

2016

2017

2018

2019

2020

2021

2022

2023



# Summary

- Population and household forecasts ahead of Plan 2035
- Staff research based on aligning Priority Areas more closely with Plan 2035 Growth Policy boundaries
- Since 2010, majority (56%) of housing growth has occurred in Priority Area 2
- Pipeline shows move to Priority Area 1 (67%)
- Pipeline in Plan 2035 Centers represents 31% of all units, and 46% of units within Priority Area 1
- Development cases received recovering to pre-downturn (2006/7) levels