

Summary of Residential Development Capacity Analysis

December 30, 2020

The Residential Development Capacity Analysis (RDCA) is an estimate of the total potential residential development that may be built in Montgomery County, MD, under a certain set of assumptions and constraints. These assumptions include, among others, applicable market trends, zoning rules and existing policy decisions. The RDCA will serve as a baseline measure that aims to estimate current residential capacity in Montgomery County in dwelling units.

The analysis and results of the RDCA are meant to provide an estimate of the available residential development options that can accommodate demand from future population growth. While this analysis provides an estimate of the number of dwelling units permitted to be built under existing zoning capacity, this estimate is only meant to be advisory. The RDCA is not meant to speak to an individual parcel's ability, or likelihood, to develop or redevelop. Zoning is not a guarantee of future residential development and is subject to a variety of factors that can affect the number of units built. To the extent possible, the RDCA tries to incorporate relevant factors to estimate likely capacity with the recognition that each parcel has unique physical and market conditions that will greatly influence capacity.

Top 5 Takeaways from Residential Development Capacity

1. Montgomery County has capacity for over 65,000 dwelling units¹. Most of the capacity in Montgomery County is concentrated downcounty near transit, and along the original corridor, the I-270 corridor. The greatest volume of capacity is on sites zoned for high density housing in the Commercial Residential (CR) family of zones, which represent less than 5 percent of the county's total land area.
2. Most residential capacity is tied up on the small sites – on sites less than 5 acres, highlighting Montgomery County's continued development pattern shifting from greenfield development and toward infill development and compact form.
3. Montgomery County has a diminished availability of land for redevelopment or development, with the parcels available for development or redevelopment representing only 15 percent of the county's land.
4. Rather than extend sprawl through the extension of low-density residential development in the Agriculture Reserve, findings demonstrate that the county can prioritize agriculture and rural open space and also build more housing by reevaluating previously made policy decisions, such as the preservation of single-family zoning near our accessible, transit-proximate, single-family neighborhoods.
5. There are many barriers to building housing, including assembling land, building on difficult sites, the increased development costs on infill sites, and neighborhood opposition. These variables are unable to be fully quantified but are important to consider when discussing future capacity. These barriers will be more pronounced in the future as the county continues to build out.

¹ Zoning capacity was not measured for municipalities with their own zoning authority.