

# 2025 Update

# Delaware Strategies for State Policies and Spending

*A Brief History and  
Overview of Update Process*

February 2025



# Looking Back – 30+ years ago

- Not all local governments developed comprehensive plans, or updated them regularly.
- The State and its agencies did not have a unifying plan or policy regarding land use, infrastructure and services.
- There was little coordination between the State and local governments regarding land use and infrastructure.

# Looking Back – 30+ years ago

- December 1994 – Shaping Delaware’s Future Planning Conference
  - 120 attendees
- Interest Group Meetings
  - 40 meetings
- Interactive County Workshops
  - 250 attendees
- Telephone Survey
  - 1000 households

# Goals of “Shaping Delaware’s Future”

- **Goal 1** – Direct investment and future development to existing communities, urban concentrations, and growth areas.
- **Goal 2** – Protect important farmlands and critical natural resource areas.
- **Goal 3** – Improve housing quality, variety and affordability for all income groups.
- **Goal 4** – Ensure objective measurement of long-term community effects of land use policies and infrastructure investments.
- **Goal 5** – Streamline regulatory processes and provide flexible incentives and disincentives to encourage development in desired areas.
- **Goal 6** – Encourage redevelopment and improve the livability of existing communities and urban areas and guide new employment into underused commercial and industrial sites.



# Goals of “Shaping Delaware’s Future”

- **Goal 7** – Provide high quality employment opportunities for citizens with various skill levels to retain and attract a diverse economic base.
- **Goal 8** – Protect the state’s water supplies, open spaces, farmlands and communities by encouraging revitalization of existing water and wastewater systems and the construction of new systems.
- **Goal 9** – Promote mobility for people and goods through a balanced system of transportation options.
- **Goal 10** – Improve access to educational opportunities, health care and human services for all Delawareans.
- **Goal 11** – Coordinate public policy planning and decisions among state, counties and municipalities.

# Origination of the State Spending Strategies

- Cabinet Committee on State Planning Issues - 1994
- Responsibilities from Del Code, §9101, Title 29:
  - “The Committee shall consider matters relating to the orderly growth and development of the State, including, but not limited to:”  
recommendations for the most desirable general pattern of land use
- Instructed the Office of State Planning Coordination to develop the **Strategies for State Policies and Spending** to guide decisions.

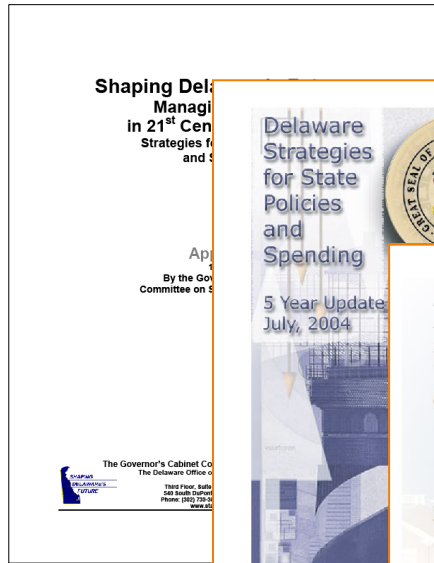
# Delaware Code Requirement

- Today the State Strategies is required by Delaware Code
- Title 29, Chapter 91, Section 9101 (c) (5):

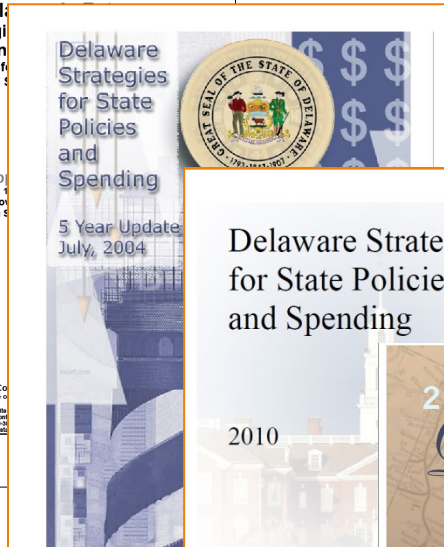
... The Committee shall consider matters relating to the orderly growth and development of the State, including, but not limited to:

Preparing the **Strategies for State Policies and Spending document and maps**, which shall serve as **the primary policy guide** that summarizes the State's land use goals, policies and strategies and directs State spending into investment levels that **support the most efficient use of State resources**, be they physical, fiscal, or natural, except that county and municipal governments shall retain their existing autonomy with respect to the land use designations set forth in their proposed and/or adopted comprehensive plans. The Strategies for State Policies and Spending shall be **updated at least every five years**, provided that the Governor may extend the deadline at his or her discretion.

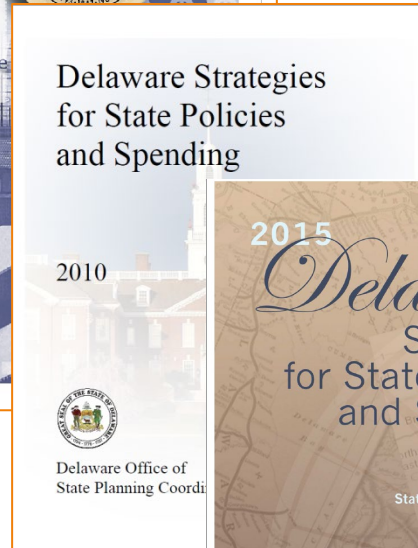
# Previous Strategies Versions



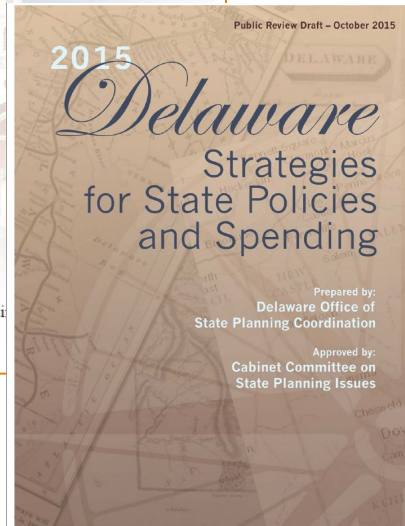
1999



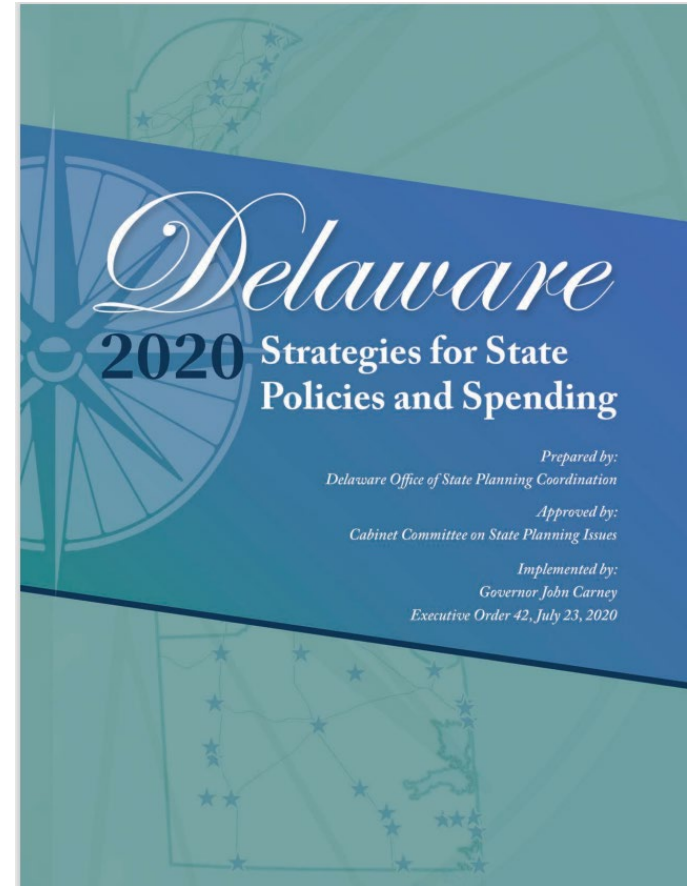
2004



2010



2015



# Strategies Purpose

- To coordinate the provision of infrastructure and services with land-use decisions at the local level.
- Why Coordinate:
  - Land use decisions are a local responsibility;
  - The provision of infrastructure and services is a State responsibility
  - If the above aren't coordinated, then waste and inefficiency can occur
  - Quality of life is impacted

In other states, local governments fund these items. Often, they utilize property tax as primary funding. In Delaware, the legislature funds them through various revenue streams that are not tied directly to growth and services.

<sup>1</sup>Updated Sussex County MOU with State Police provides 50% funding for 50 officers by FY2026. Current budget is \$4.1 million.

Figure 9: By the Numbers

## State Funding for Services and Infrastructure

Explore the Financial Investments Dashboard [Here](#)

### Delaware's State government funds many services and infrastructure needs...



**\$750,500,000**  
Federal and state capital transportation funding for FY24

**90%**  
State Roads



**\$152,963,400**  
State police personnel and budget for FY24

<sup>1</sup>**100%**  
State's Largest Police Force



**\$16,028,455**  
State paramedic program funding for FY24

**30%**  
Paramedics

### Including a variety of support for public education...



**90%**  
Public School Transportation

**\$166,833,900**  
School transportation funding for FY24



**\$224,781,456**  
Education capital funding for FY24

**60-80%**  
Public School Construction



**70%**  
Public School Operations

**\$1,985,193,200**  
Education operating funding for FY24



# Delaware's Demographics

Figure 12: By the Numbers

Sources: American Community Survey, Delaware Population Consortium

## Delaware Demographics and Housing

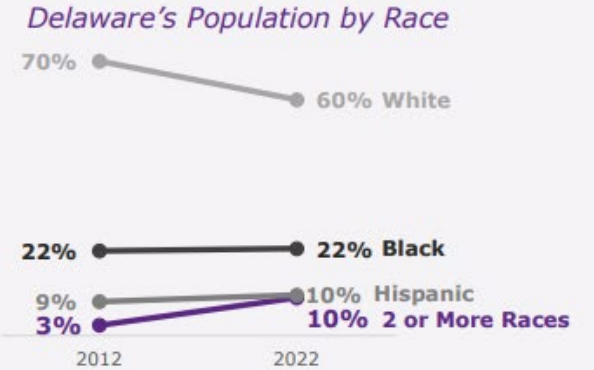
Housing costs are rising as Delaware's population ages and becomes more diverse.

Between 2012 and 2022...



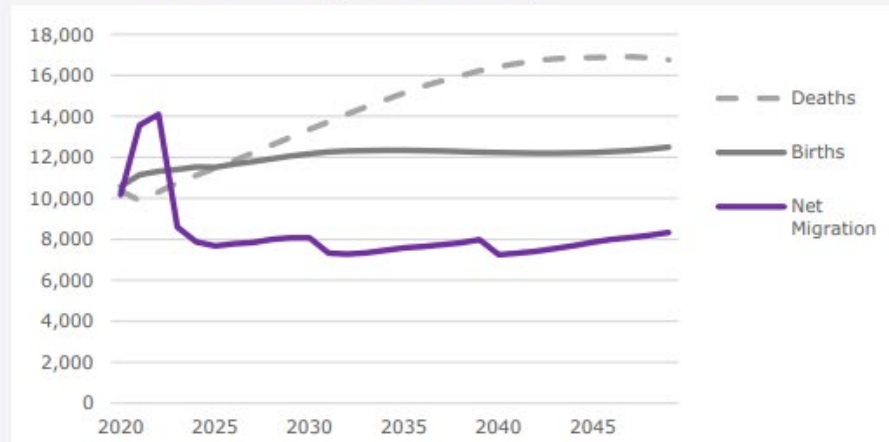
Delaware's rising housing costs outpaced household incomes.

Delaware's 65+ population increased from 15% to 21%.

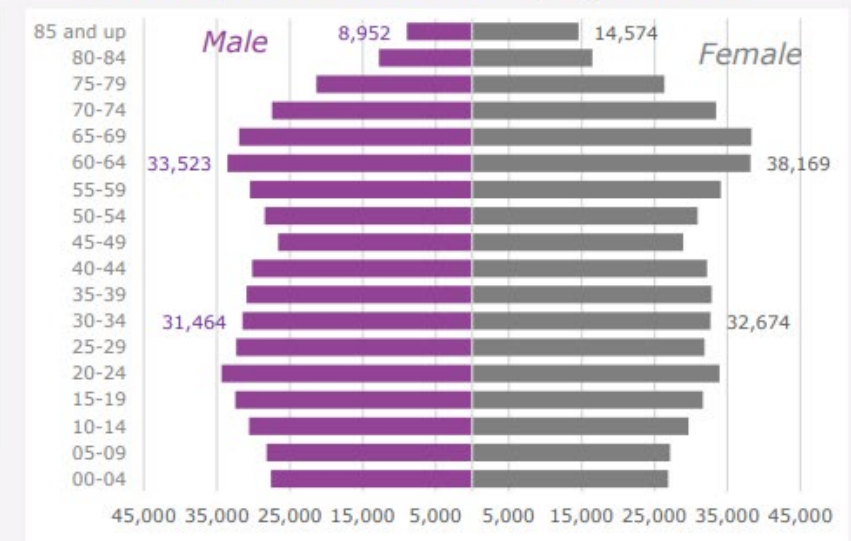


Delaware's population is aging, and net migration is on the rise.

Factors in Population Change



2024 Population Distribution by Age and Sex



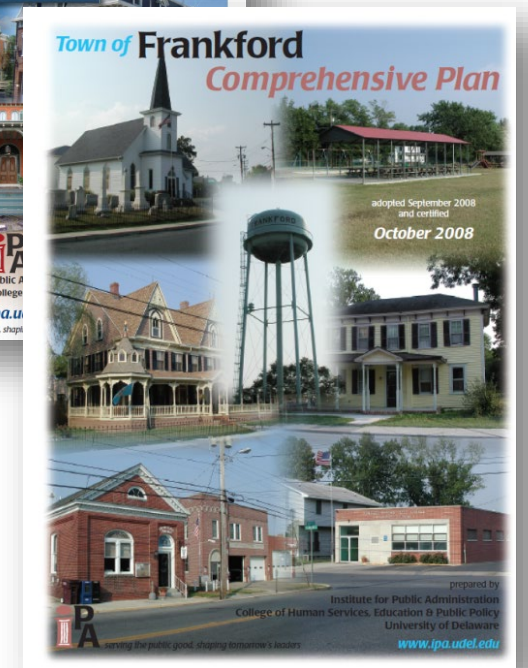
# State Spending Strategies Use by Agencies

Agency	PLUS	Capital Budget Requests and Reviews	School Site Approvals	Infrastructure and Public Facility Locations
Agriculture	X	X		
Economic Dev.	X	X		
Transportation	X	X		X
Health and Social Services	X	X		X
Natural Resources	X	X		X
Education	X	X	X	X
Housing	X	X		
Budget		X	X	
Planning	X	X	X	
Public Safety	X	X		X



# State Strategies and Local Government Planning

- Local governments use the Strategies as they are developing their comprehensive plans
- Governor certifies plans based on consistency with State Strategies



# 2025 Update

- Delaware Code: Title 29, Chapter 91, Section 9101 (c) (5) requires an update every 5 years
- Incorporate updated data
  - Comprehensive Plans certified since 2020
  - State Agency data layers
  - New data not available in 2020
- Review and refine State Agency policies tied to State Strategies
- Incorporate Feedback from Data Analysis Workgroup Process

# Our update process

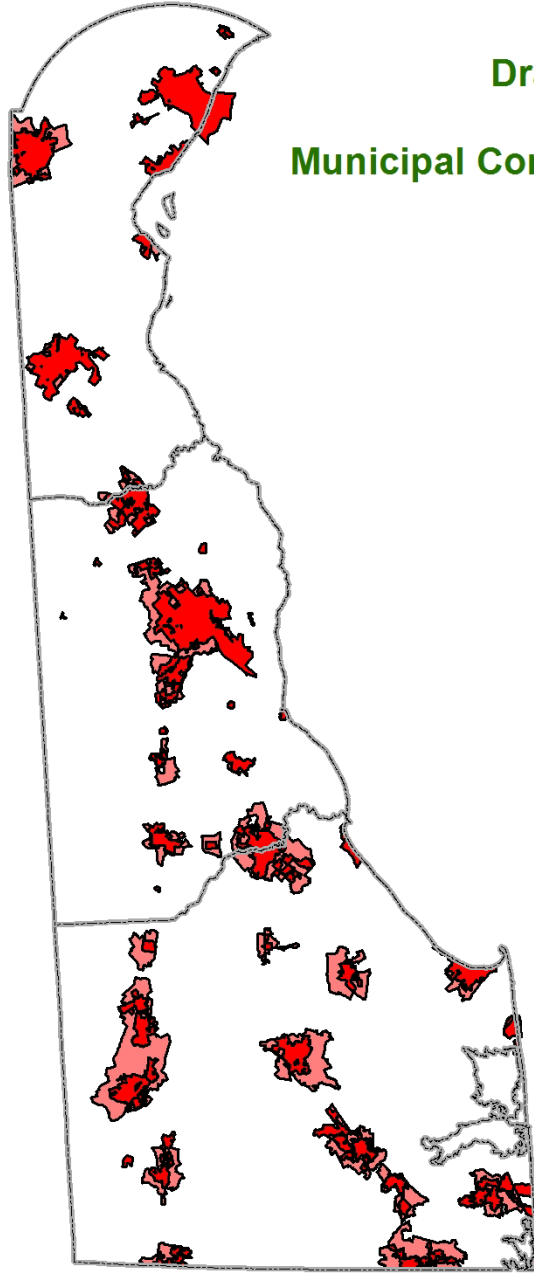
- Data collection
- Data Analysis Workgroup outreach
- Consult with state agencies, MPOs, counties, local governments
- GIS – apply appropriate map overlays, including certified comprehensive plan maps
- Public Workshops
- Review of draft document and maps
- Approval by the Cabinet Committee and the Governor

# Data used to make maps include:

- School Sites
- Transit Routes
- Social Service Centers
- Police/Fire/EMS Facilities
- Corridor Capacity Preservation Areas
- Ag Preservation Districts
- Green Infrastructure
- Parklands
- Municipal and County certified comprehensive plans

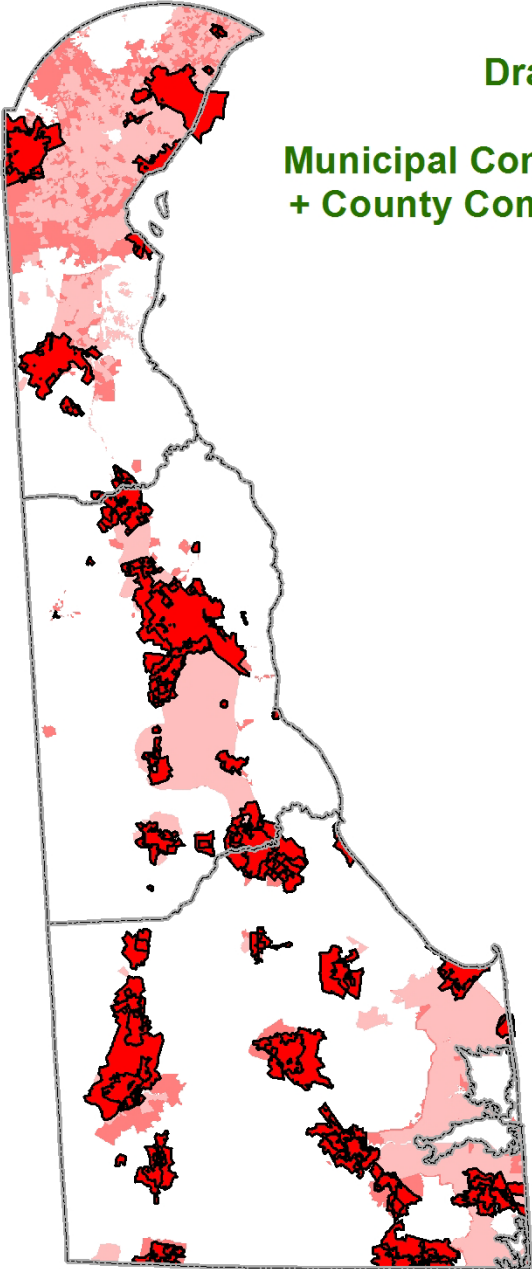
Draft 2015

Municipal Comprehensive Plans



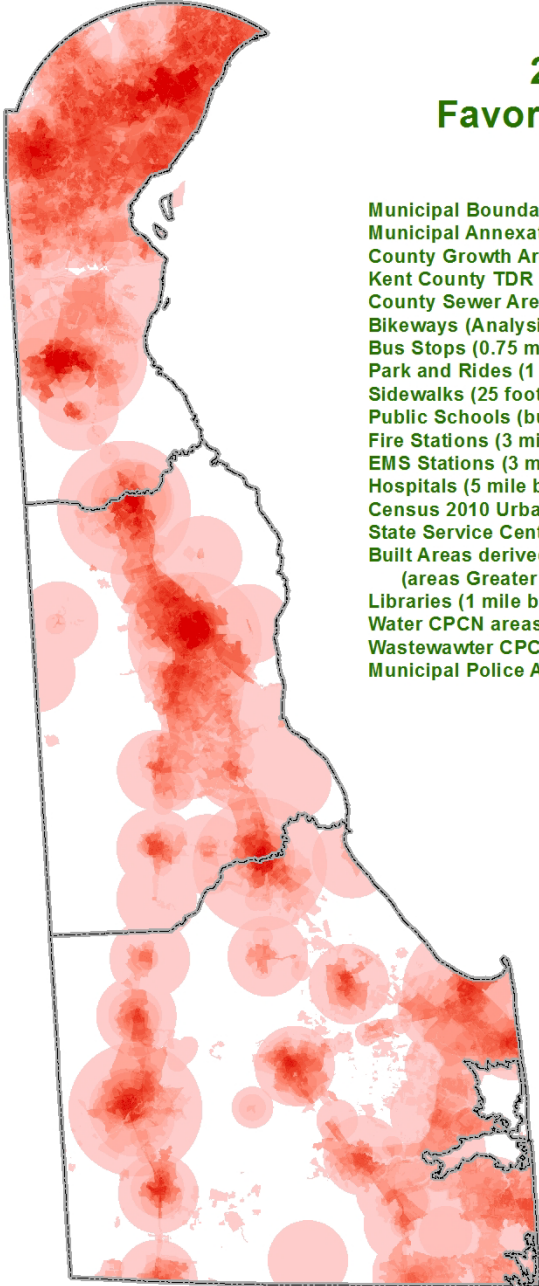
Draft 2015

**Municipal Comprehensive Plans  
+ County Comprehensive Plans**



# 2015 DRAFT Favoring Development

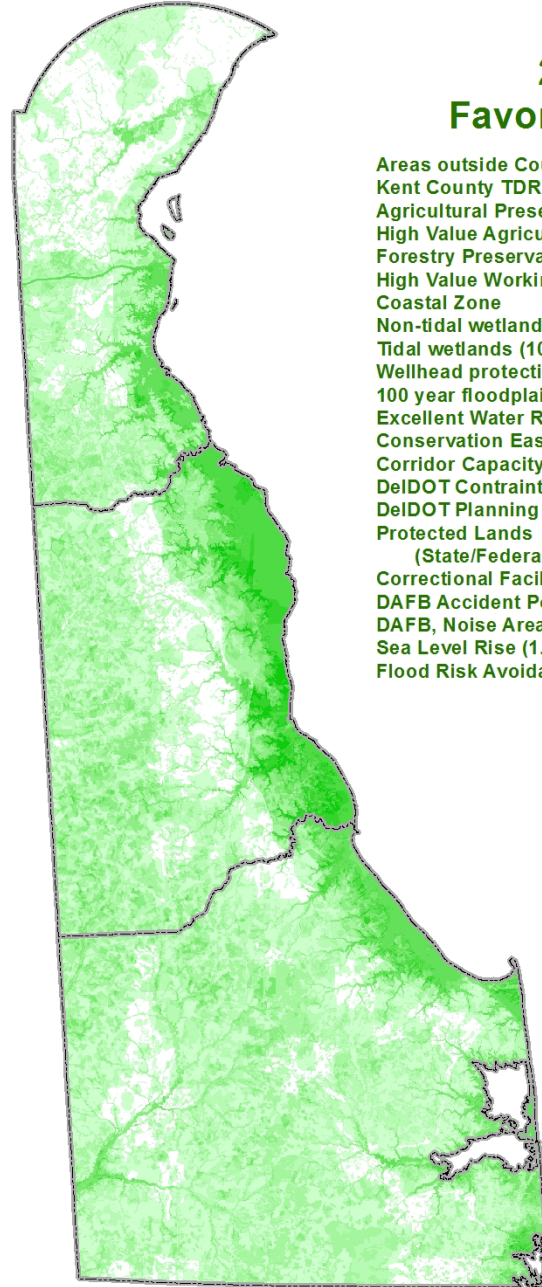
- Municipal Boundaries
- Municipal Annexation Areas (Comprehensive Plans)
- County Growth Areas (Comprehensive Plans)
- Kent County TDR Receiving Areas
- County Sewer Areas
- Bikeways (Analysis from State Parks)
- Bus Stops (0.75 mile buffer)
- Park and Rides (1 mile buffer)
- Sidewalks (25 foot buffer)
- Public Schools (buffered)
- Fire Stations (3 mile buffer)
- EMS Stations (3 mile buffer)
- Hospitals (5 mile buffer)
- Census 2010 Urban Areas
- State Service Centers (2 mile buffer)
- Built Areas derived from 2012 LULC  
(areas Greater than 350 contiguous acres)
- Libraries (1 mile buffer)
- Water CPCN areas (within Growth Zones)
- Wastewater CPCN (within Growth Zones)
- Municipal Police Agencies





## 2015 DRAFT Favoring Preservation

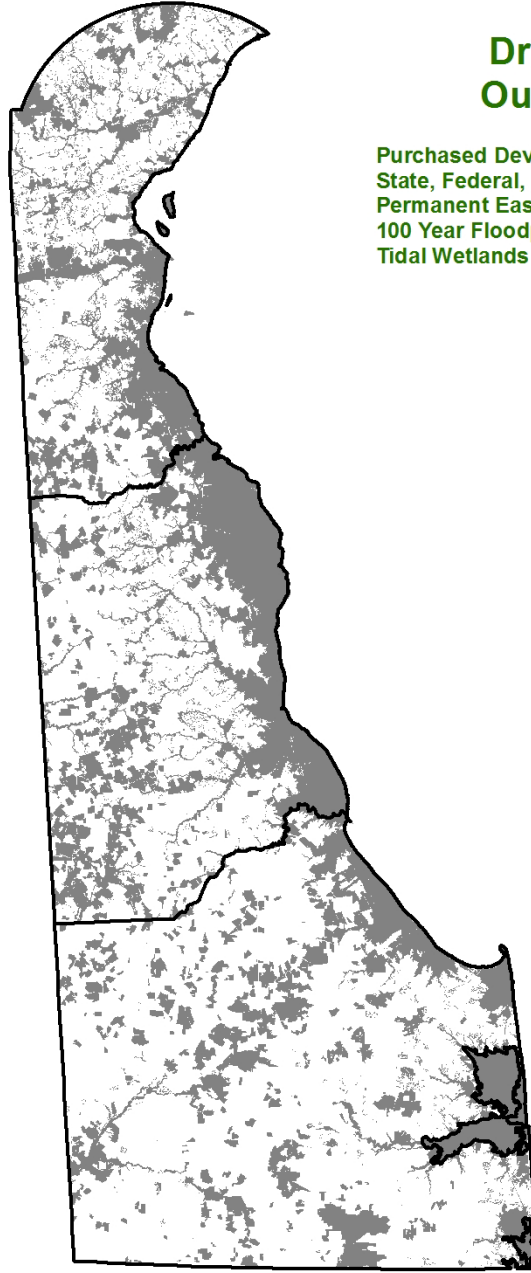
Areas outside County Growth areas  
Kent County TDR sending areas  
Agricultural Preservation Districts  
High Value Agricultural Lands  
Forestry Preservation areas  
High Value Working Forest Lands  
Coastal Zone  
Non-tidal wetlands (100 foot buffer)  
Tidal wetlands (100 foot buffer)  
Wellhead protection areas  
100 year floodplain  
Excellent Water Recharge Areas  
Conservation Easements  
Corridor Capacity Preservation Parcels (owned)  
DeIDOT Constraints  
DeIDOT Planning Priority Area (Kent Co., east of Route 1)  
Protected Lands  
(State/Federal/Municipal Owned and Public Open Space)  
Correctional Facilities (1 mile buffer)  
DAFB Accident Potential Zones (APZ)  
DAFB, Noise Areas/AICUZ  
Sea Level Rise (1.0 meter scenario)  
Flood Risk Avoidance Map (FRAM)

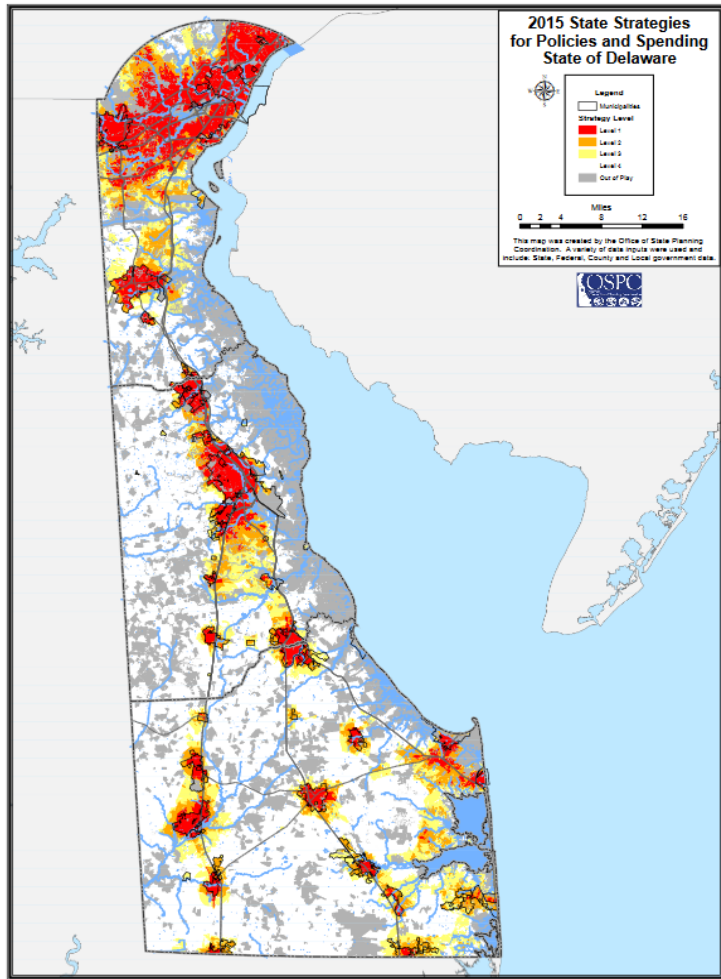




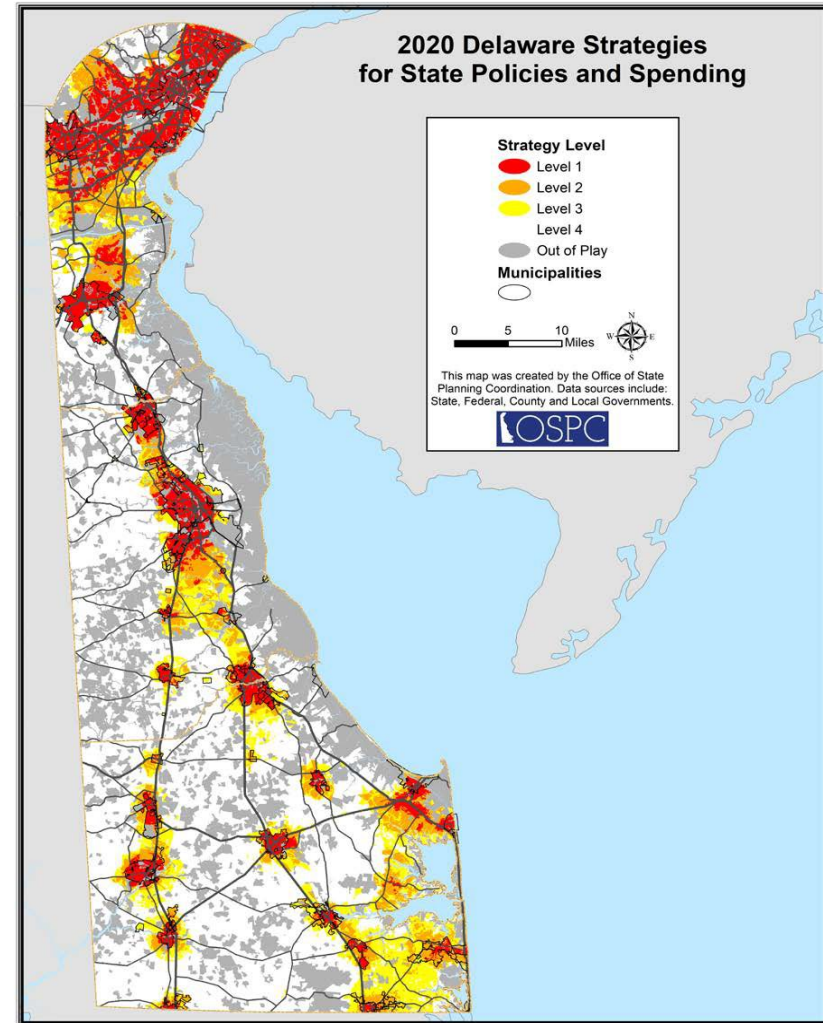
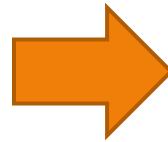
## Draft 2015 Out of Play

Purchased Development Rights (PDR)  
State, Federal, Local Publicly owned lands  
Permanent Easements  
100 Year Floodplains (NC, KC)  
Tidal Wetlands

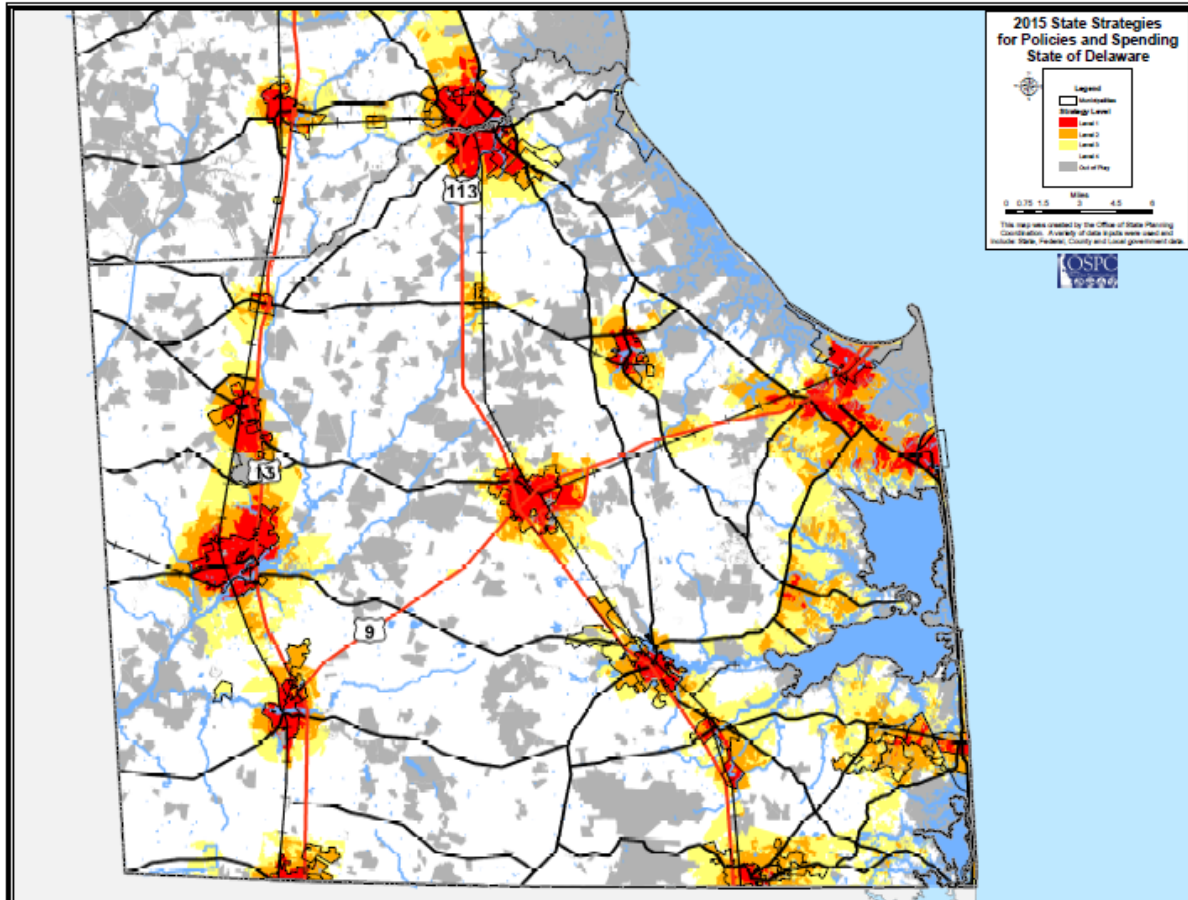




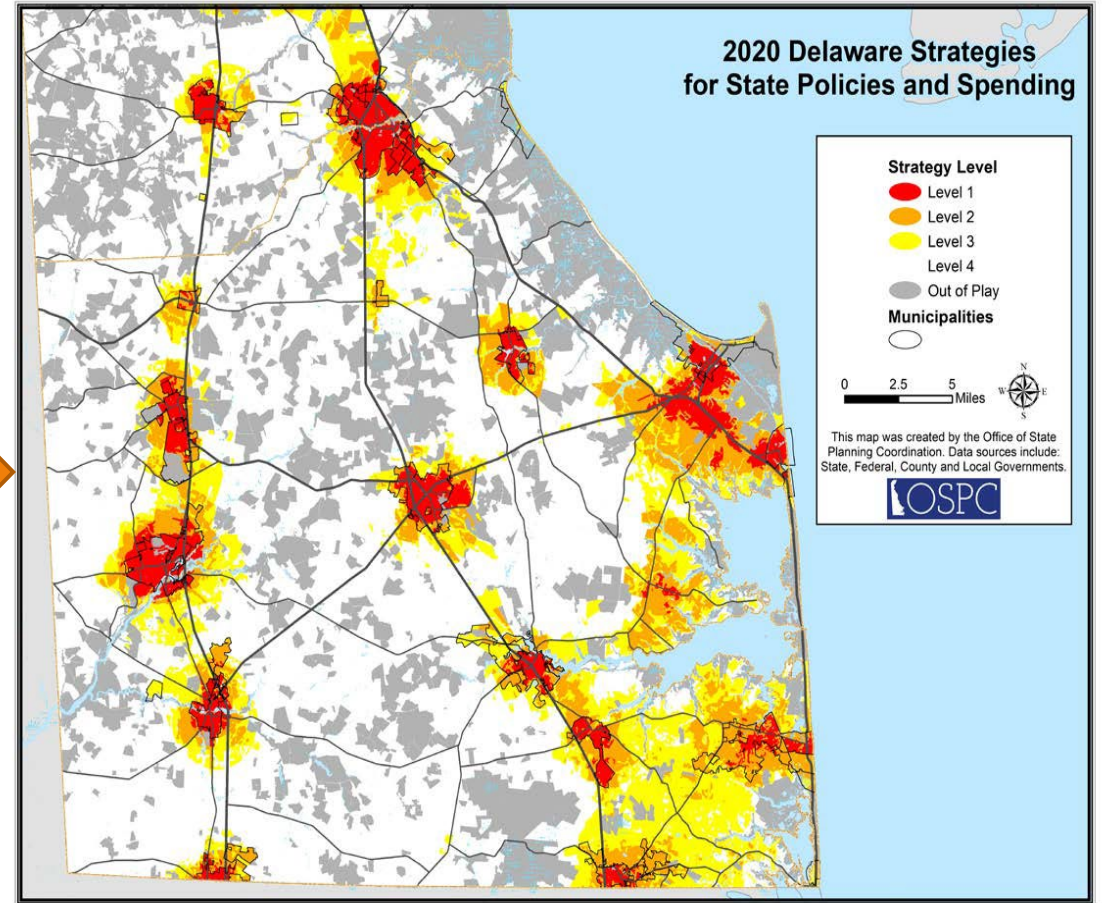
2015 Strategies



2020 Strategies



2015 Strategies



2020 Strategies

# Components:

- Urban/Urbanizing Growth (Levels 1, 2, & 3)
- Preservation and Rural (Level 4 [white areas])
- “Out of Play” (Grey areas)



# Level 1:

Overlook, Dover



Main Street, Newark



Union Park Gardens, Wilmington



Wilmington

# Level 2:



Paynter's Mill, Milton



Cannery Village, Milton



Pike Creek, New Castle County



The Village of Five Points, Lewes



# Level 3:





# Level 4:





# Out of Play:



# Important Considerations

- These maps are not parcel based
  - You must check with local government for information about use and development of specific parcels
  - Even in growth-oriented Investment Levels, not all parcels can or should be developed. Again, check with local government
- Circumstances may exist, on a case-by-case basis, where State and other investments may be warranted to address unforeseen circumstances involving public health, safety or welfare.

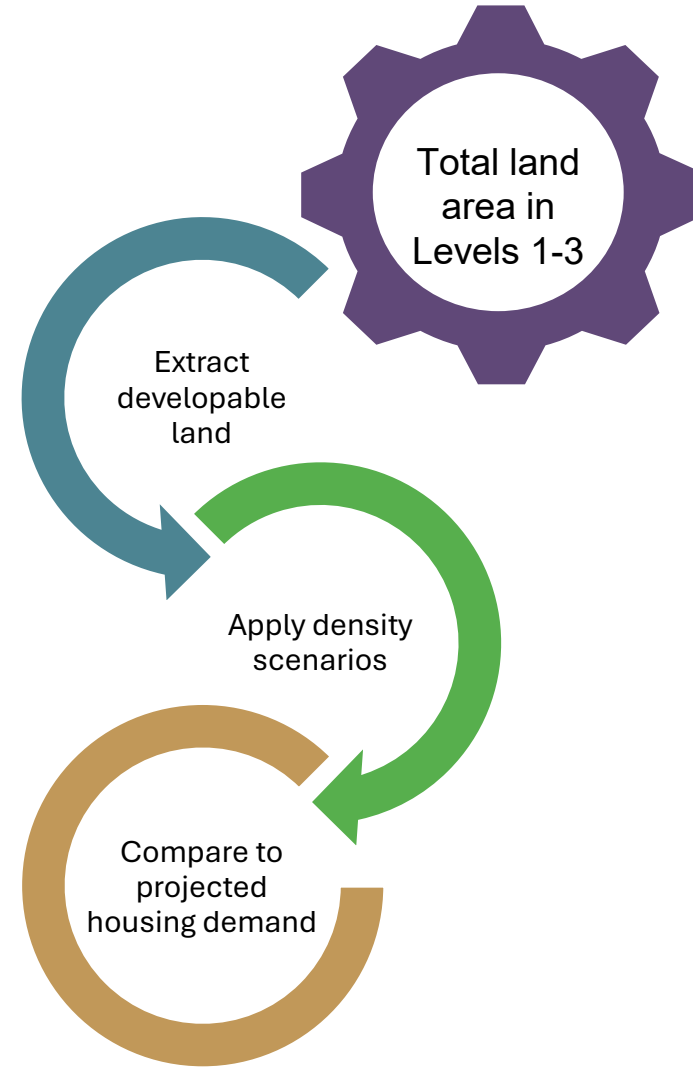
# Calculating Residential Development Capacity

## State Strategies

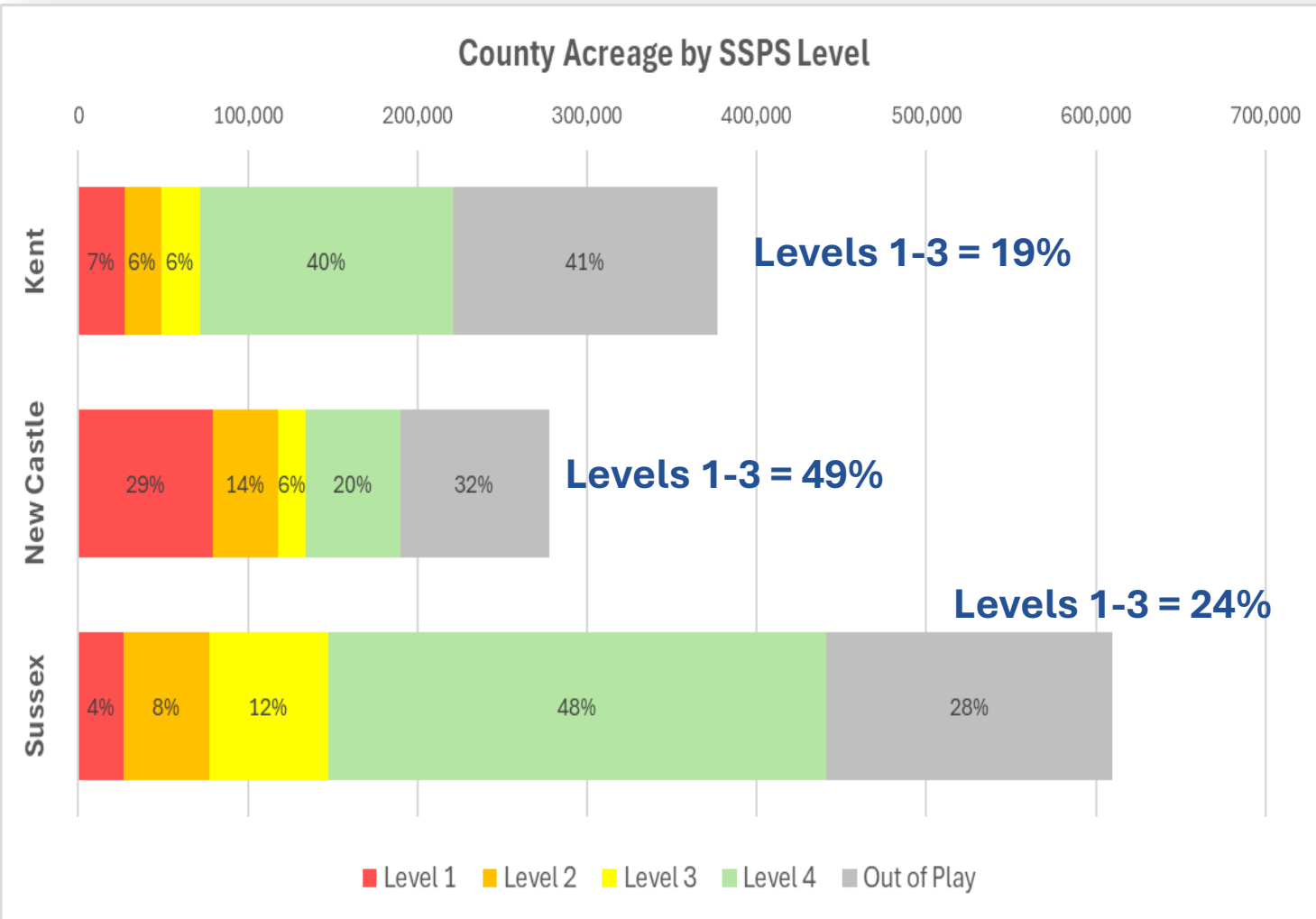
Level 1

Level 2

Level 3



# Total Land Area by Strategy Level



	Land Area (acres)		
SSPS Level	Kent	New Castle	Sussex
Level 1	27380	79293	27665
Level 2	21561	38694	51464
Level 3	22904	16228	72358
Level 4	149446	55539	301384
Out of Play	155810	87880	173105
<b>Total</b>	<b>377,100</b>	<b>277,635</b>	<b>625,976</b>
Level 12&3	71845	134215	151487

# Housing Demand

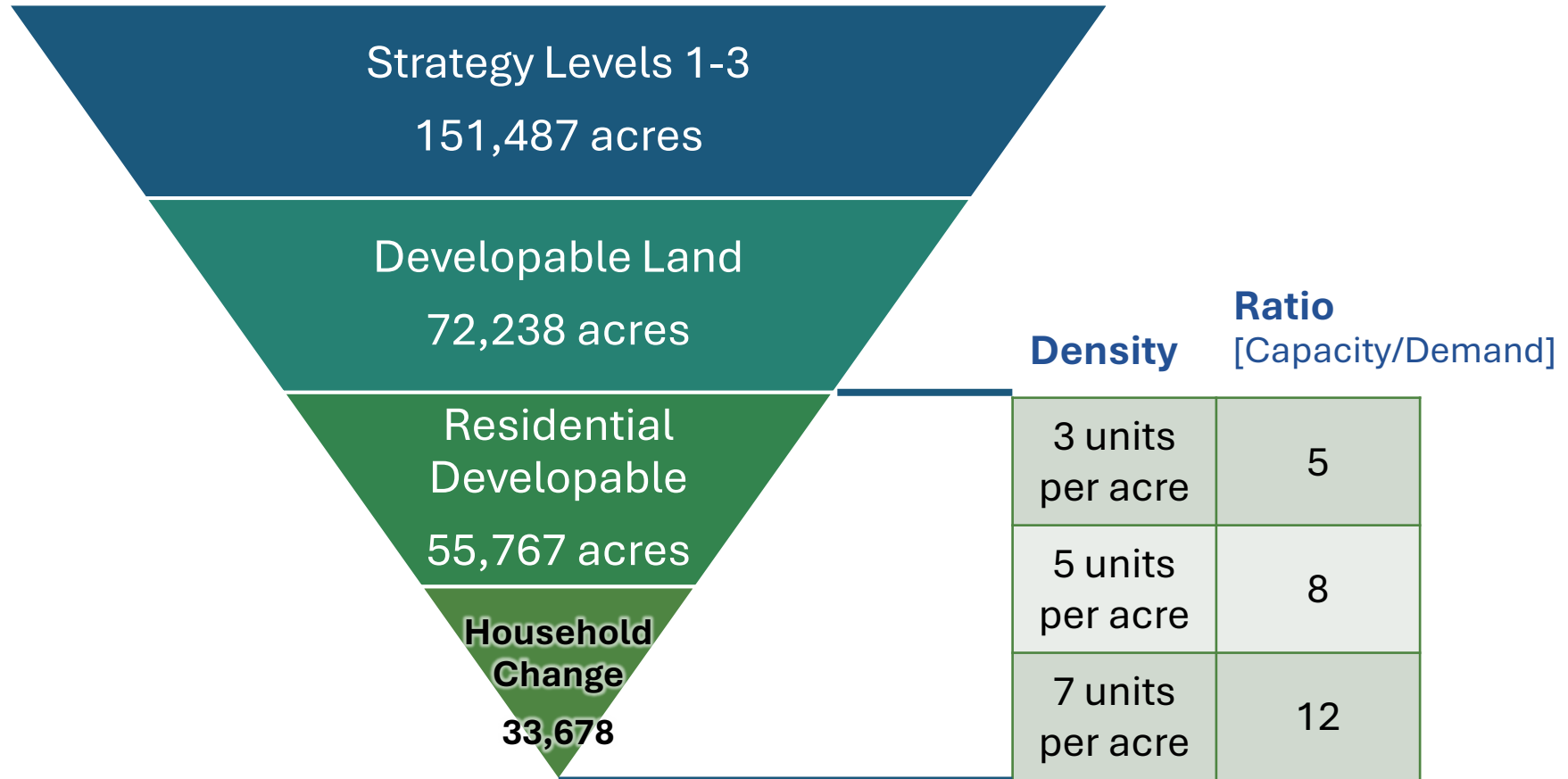
Calculate the total household change by county

DPC 2023 (Household Change*)						
	2020	2025	2030	2035	2040	Total
New Castle	6,076	2,975	<del>-330</del>	<del>-3,054</del>	<del>-3,657</del>	9,051
Kent	5,662	3,472	2,646	1,735	1,336	14,851
Sussex	13,332	8,695	5,957	4,022	1,672	33,678

\*This analysis excludes negative projections of household change.

# Assessment of Capacity vs Demand

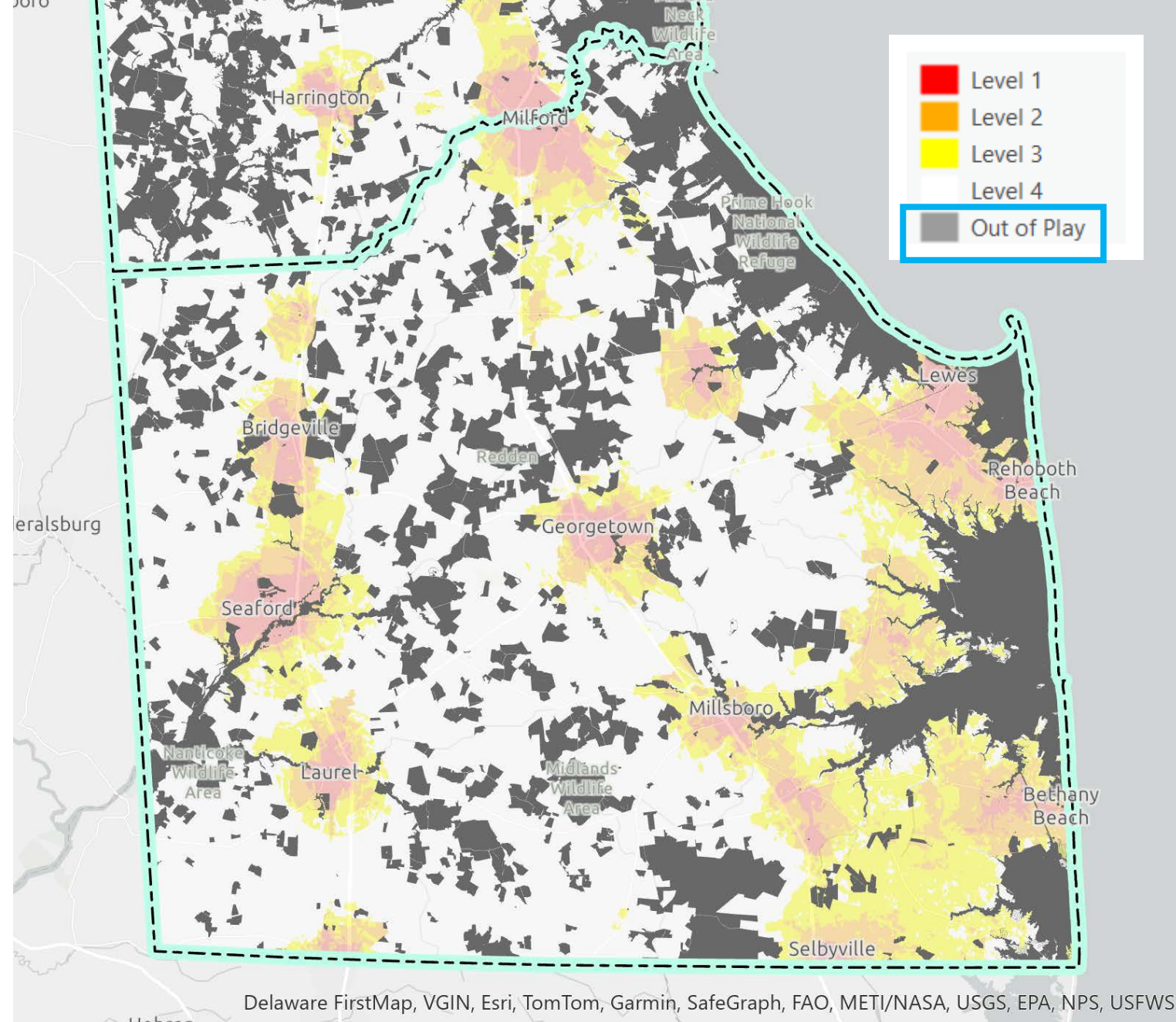
Sussex County





# Out-of-Play Lands in Sussex County (2020)

- Level 1: 27,665 acres
- Level 2: 51,464 acres
- Level 3: 72,358 acres
- Level 4: 301,384 acres
- **Out-of-Play: 173,105 acres**
  - Layers Included (in Sussex):
    - Permanent agricultural and forestry easements
    - Protected lands and dedicated open space
    - Tidal wetlands
    - DeDOT preservation lands and purchased dev. rights
    - Includes water features



Delaware FirstMap, VGIN, Esri, TomTom, Garmin, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, USFWS



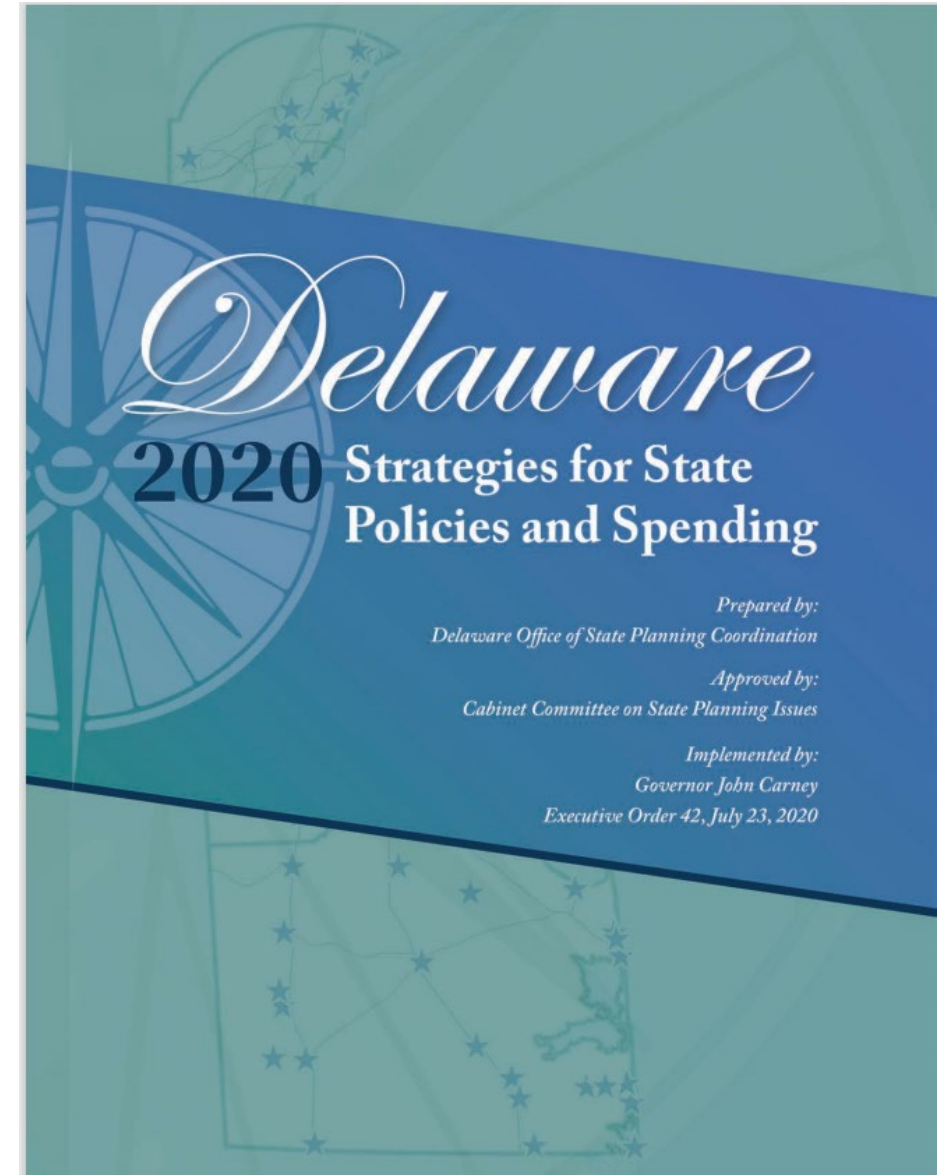
# Sussex County as our Partner

- Understand that the state is investing in Sussex County, but we will not make progress if development occurs everywhere.
- Maintain a steadfast commitment to the comprehensive plan.
  - Pro-actively plan areas where growth will be encouraged.
    - Create incentives to encourage land development and growth in designated “Growth Areas”
    - Ensure that land-use policies encourage agriculture and agricultural industry in Level 4 areas; and discourage land development in these areas.
- Share any data with OSPC that indicates the county’s growth and preservation priorities.
- Think of the state as your partner in success.



# Thank You

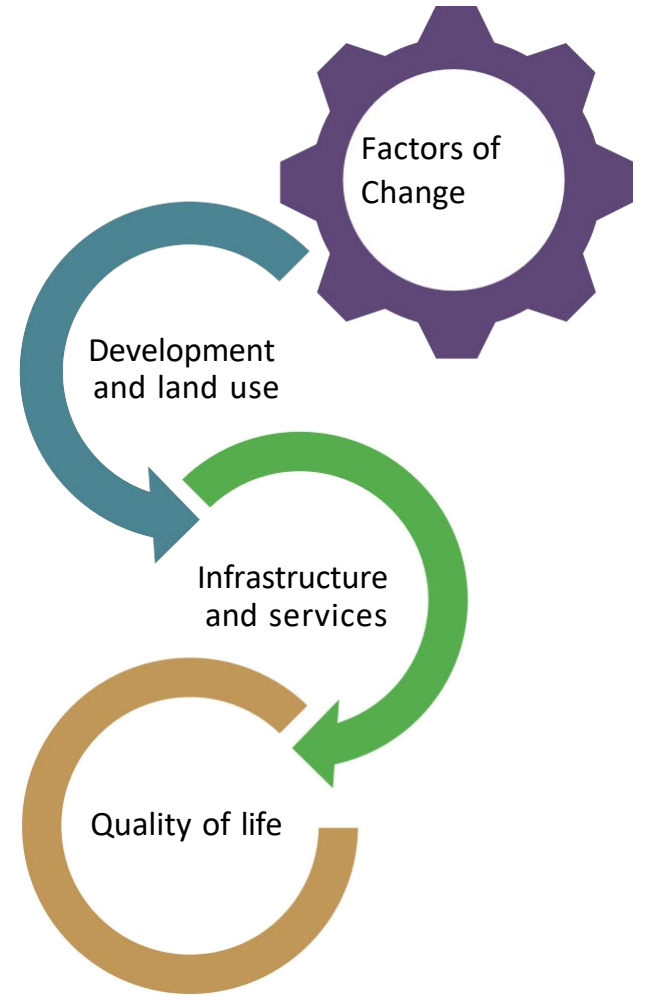
## Questions and Comments ?





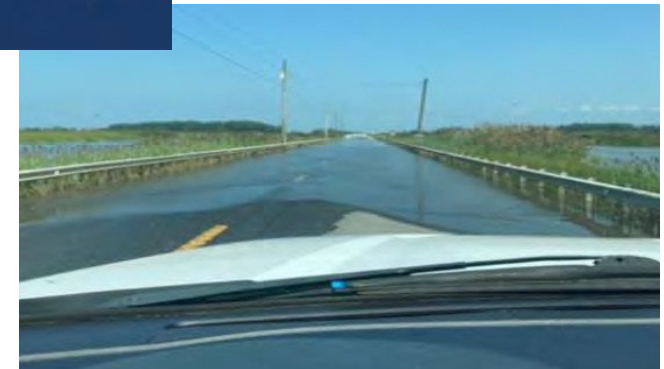
# Data-Backed Insights

External factors and their effects on Delaware communities



# Factors Affecting Delaware

- **Real estate market demand:**
  - Lower taxes attracting influx of new residents from surrounding region
    - Especially retirees
    - Especially Sussex County
- **Technology changing work and shopping patterns:**
  - E-commerce spurring warehousing presence and logistics activity
  - Remote work changing commuting habits
- **Sea-level rise, climate change and flooding:**
  - Rising water levels on our coastal state caused by GHG emissions are causing more frequent / severe flooding, including sunny-day flooding
  - Sea levels will continue to rise and days with heavy precipitation expected to increase



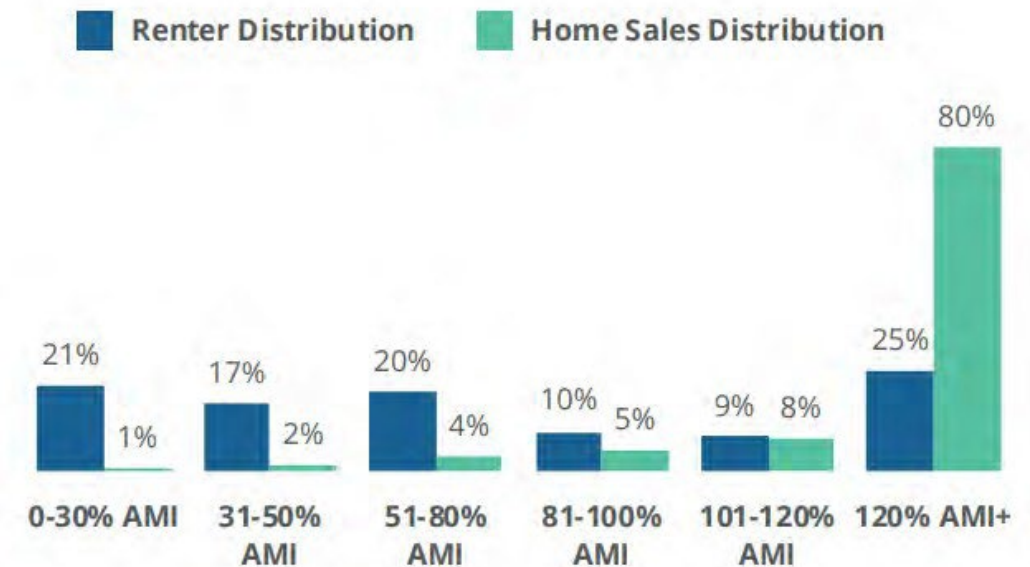
# Data Insight: Demographics are Changing

- People relocating to Delaware –
  - About 27,000 net domestic migration to Delaware (2020-2022)
- Increasing share of population is older
- Demand for high-price point housing product

## What are the implications?

- Mismatch in housing being provided relative to local need
- Increasingly unbalanced, feedback loop effect:
  - Housing
  - Development / land consumption
  - Essential services and infrastructure

Distribution of Home Sale Prices and Renters Who Can Afford to Buy Homes by AMI Range, 2022

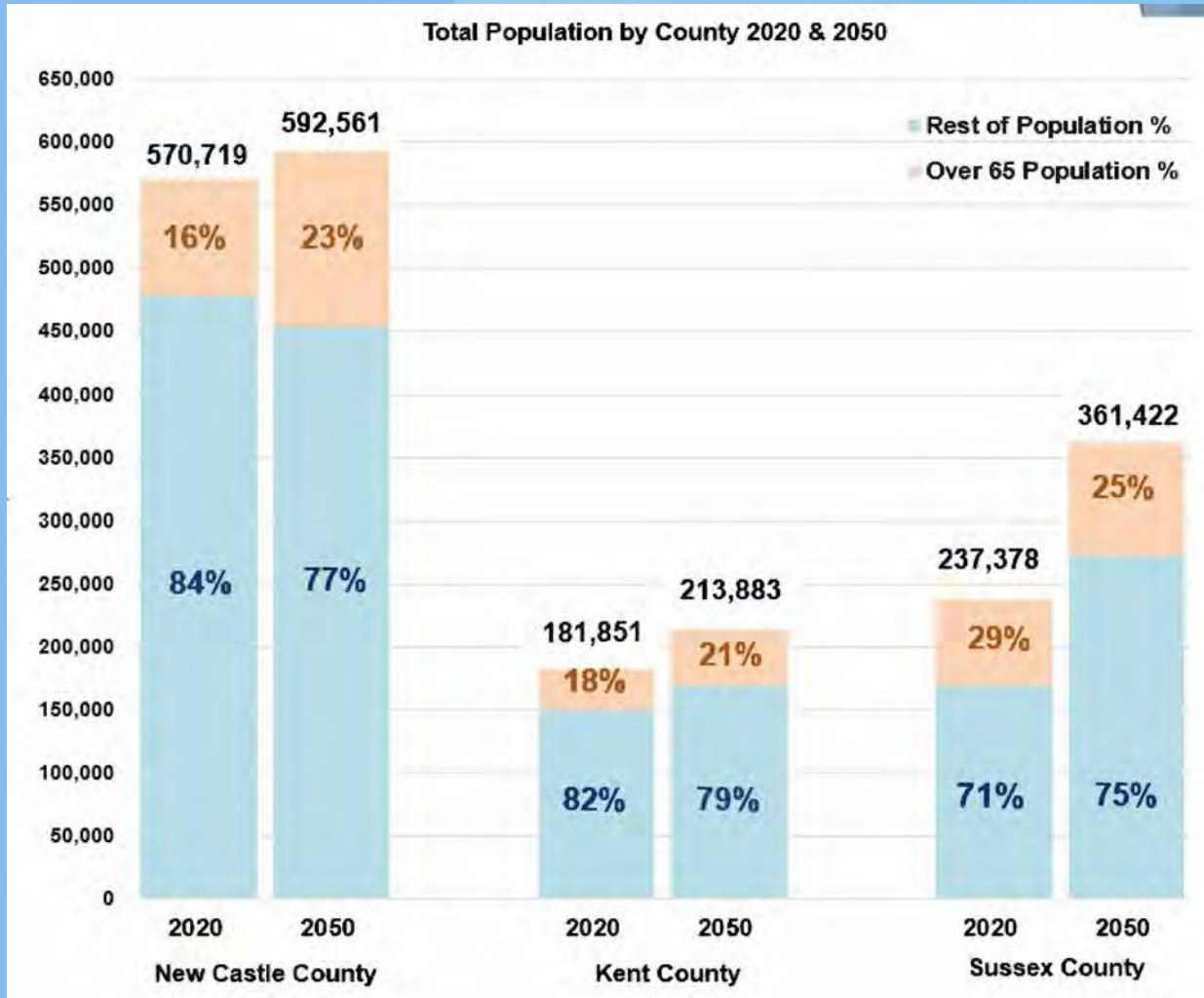


Note: Assumes a 30-year mortgage at a rate of 6.5% with a 20% down payment and 25% of monthly payment is used for property taxes, utilities, and insurance.

Source: Root Policy Research, 2021 ACS 5 year estimates, and HMDA.



# What's Going on Here?



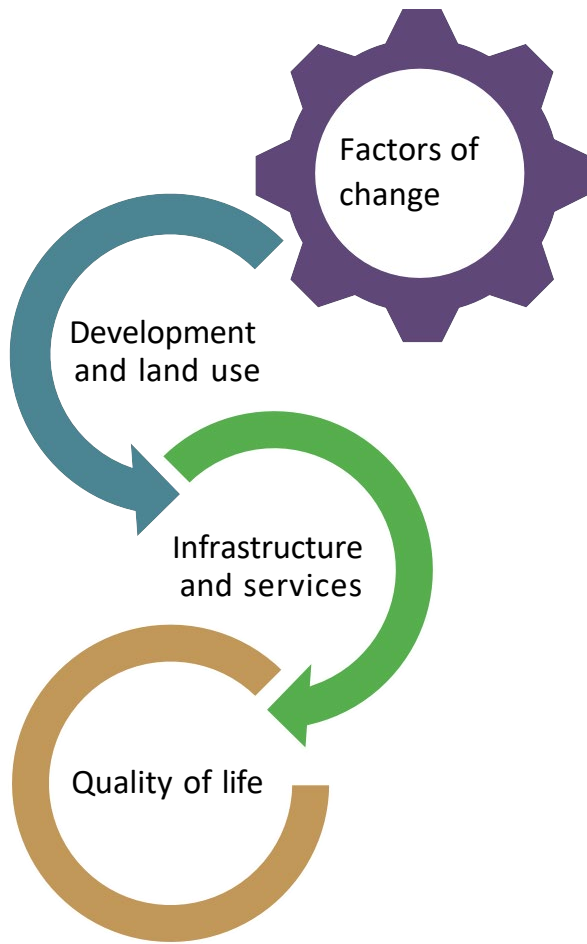
Relative to other states, locating in Delaware is appealing:

- low taxes
- access to services, amenities, etc.





# Adapting to Factors of Change



State can't control the external factors, but:

- Collaborates with local authorities on development and land use
  - Monitoring change (eyes on horizon)
  - Planning support (comprehensive plans)
  - PLUS process (provide support and insights on project basis)
- Monitors, plans, budgets/programs, provides infrastructure and services

...and inasmuch works to support communities across the state toward high quality of life



# Office of State Planning Coordination Role



STATE STRATEGIES FOR  
POLICIES AND SPENDING  
DOCUMENT AND MAP



REVIEW LOCAL  
GOVERNMENT  
COMPREHENSIVE PLANS

FORWARDS REPORT AND  
RECOMMENDATION TO  
GOVERNOR FOR  
CERTIFICATION \*

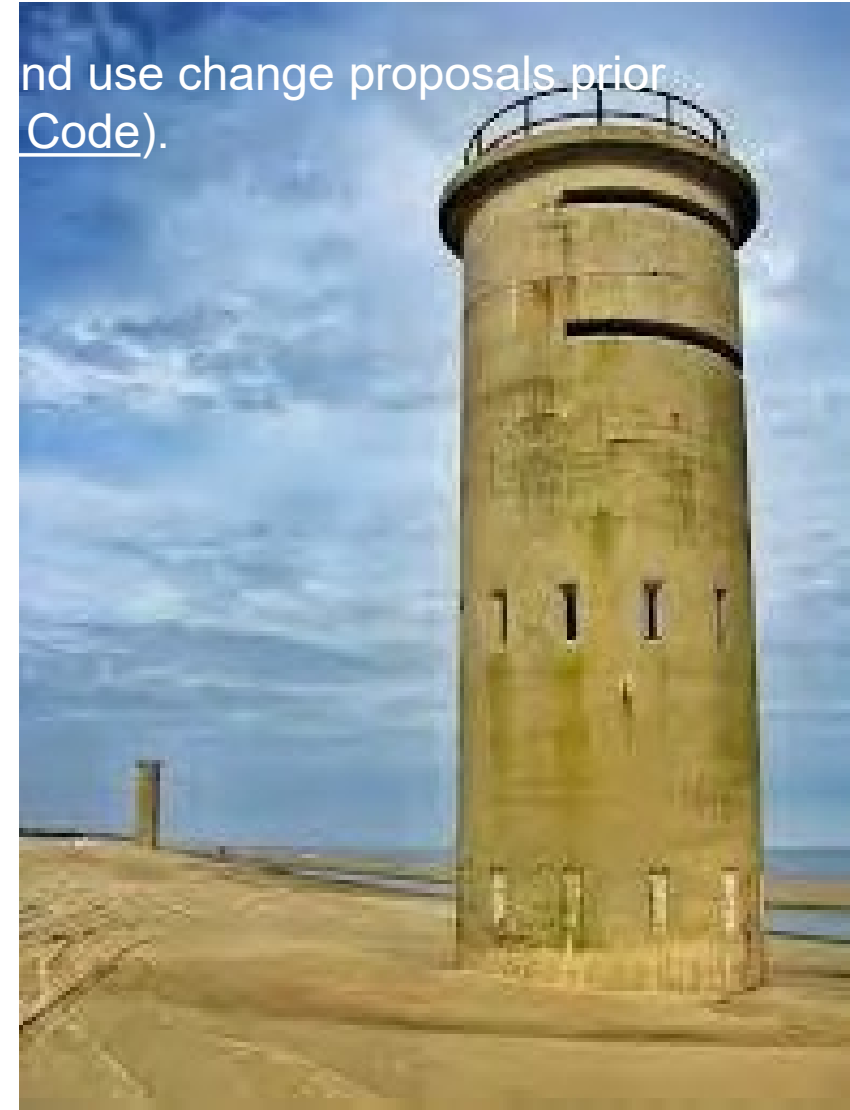


ORGANIZE COMMENTS FROM  
STATE AGENCIES VIA THE  
PRELIMINARY LAND USE  
SERVICE (PLUS)



PROVIDE TECHNICAL  
ASSISTANCE

nd use change proposals prior  
(Code).

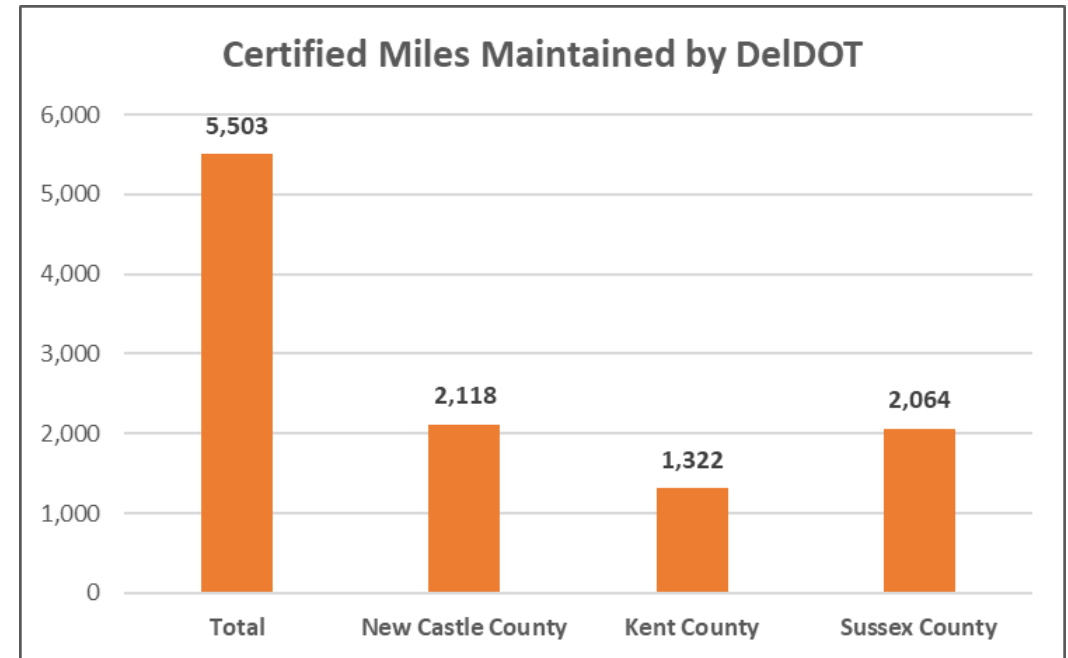


# Transportation

Delaware DOT manages 89%  
(national average of state-maintained roads: 20%)

Trends:

- Costs for infrastructure rising
- Funding forecasts trending down
- Frequently flooded roadways - 250 road segments were prioritized based on flood risk and several other factors (AADT, evacuation routes, essential facilities, etc.)
- Transit is evolving



\*HPMS certified miles, or Certified Public Mileage (CPM), are the total length of a state's public roads as certified by the state's governor.



<b>Services operating costs will continue to increase</b>		Cost per trip, cost per mile, and cost per vehicle are all rising
<b>Efficiency will decrease</b>		Miles-per-route are increasing, but revenue-per-mile is decreasing
<b>Travel needs will continue evolving</b>		Total trips are declining and average trip lengths are getting shorter

Market reviews (2010-2030)



# Transportation

Transportation Improvement Districts (TID) – a proactive, collaborative approach to planning / funding transportation infrastructure.

14 TIDs statewide – 4 In Sussex, once approved

Forecasted development in new TIDs:

**SE Milford** – 8,864 residential units

**Roxana TID** - 12,797 residential units

**Milton TID** - 4900 residential units

**Henlopen TID** - Original number planned was about 13,000. Approximately 4153 building permits have been issued in this area.

1.2 million square feet of Commercial/industrial planned for the TID areas once approved

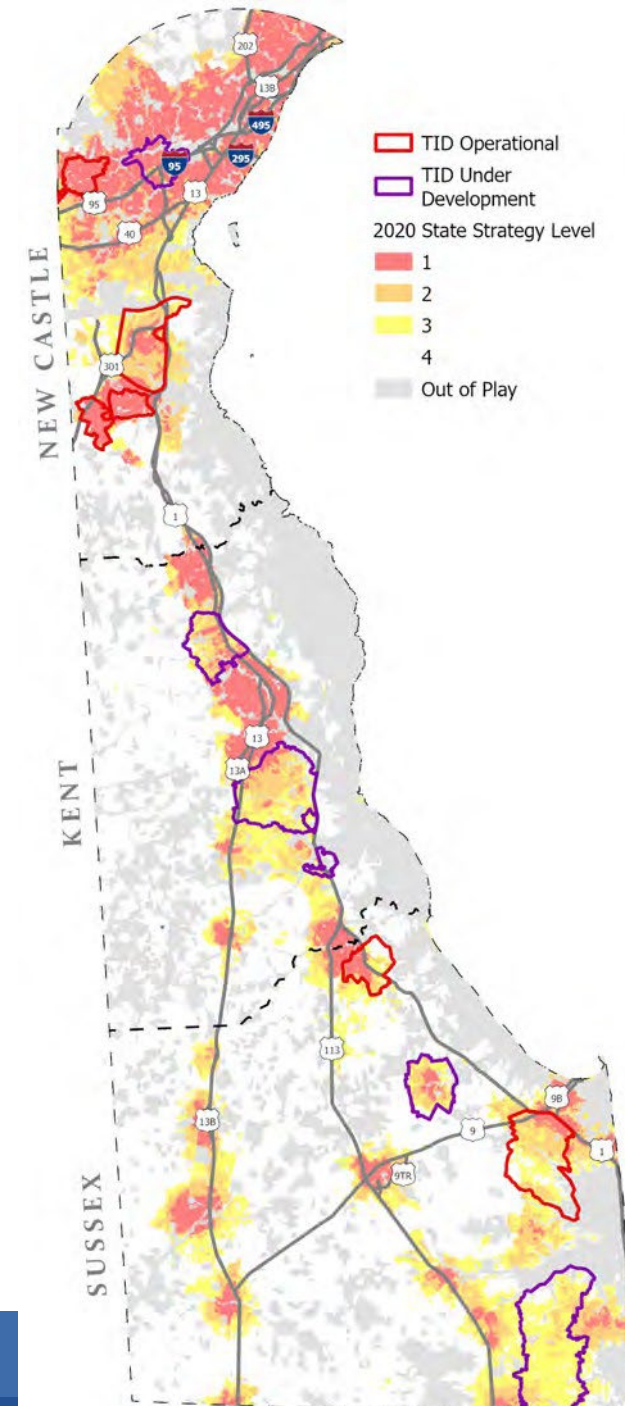
Over \$1 Billion in projects identified so far statewide.

## TID Operational

- Newark
- Southern New Castle County
- Hyetts Corner
- Westown
- Eastown
- SE Milford
- Henlopen

## TID Under Development

- Little Heaven
- South Frederica
- Cheswold Area
- Magnolia
- Milton
- Roxana Area
- Churchman's Crossing

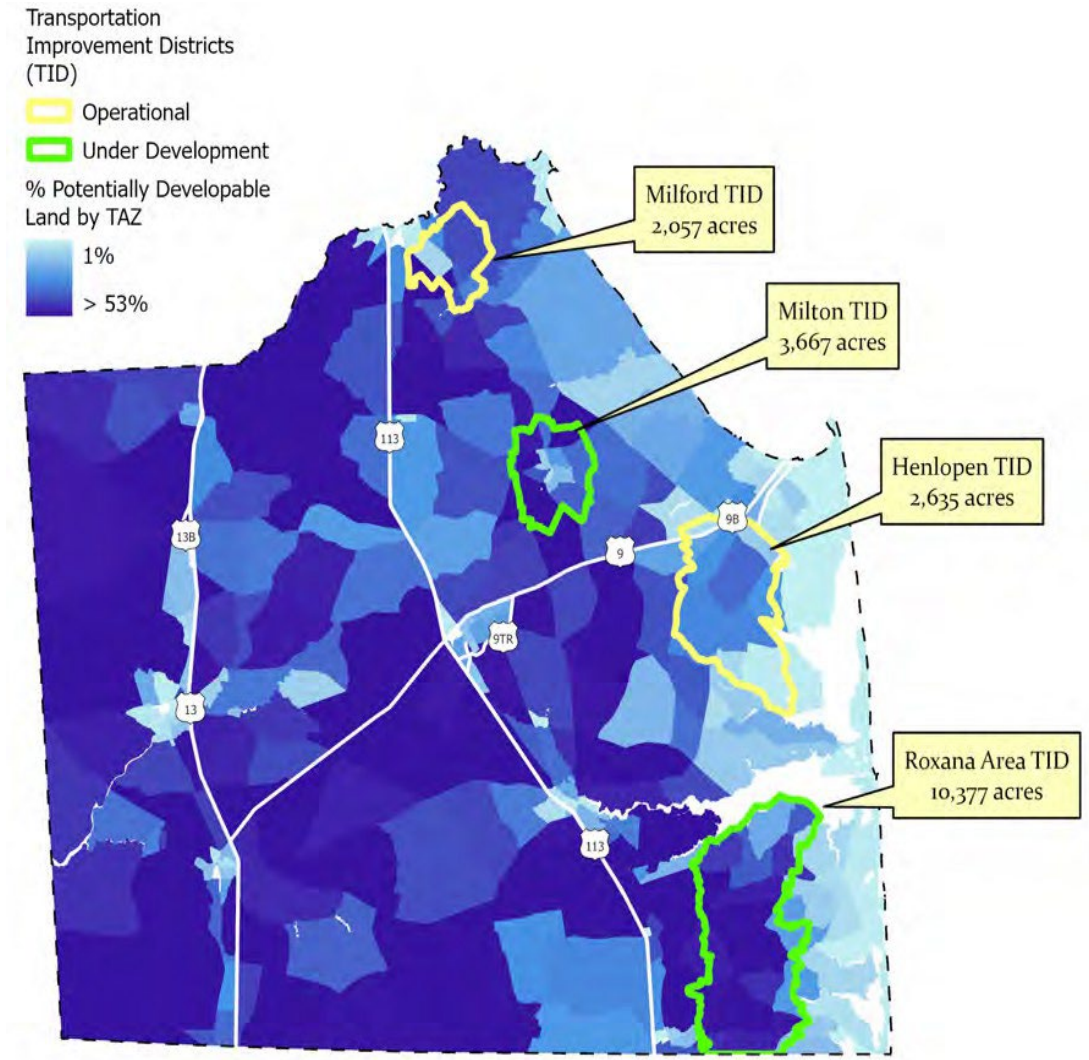


# Transportation

Dwelling Units

Transportation Improvement District (TID)	Forecast Year	SUPPLY	DEMAND
NEW CASTLE	2040	20,697	5,667
KENT	2045	16,206	14,851
SUSSEX	SE Milford	8,864	39,633
	Henlopen	13,000	
	Milton	4,972	
	Roxana Area	12,797	
<b>TOTAL</b>		<b>76,536</b>	<b>54,196</b>

Percent of land developable (estimated by TAZ)



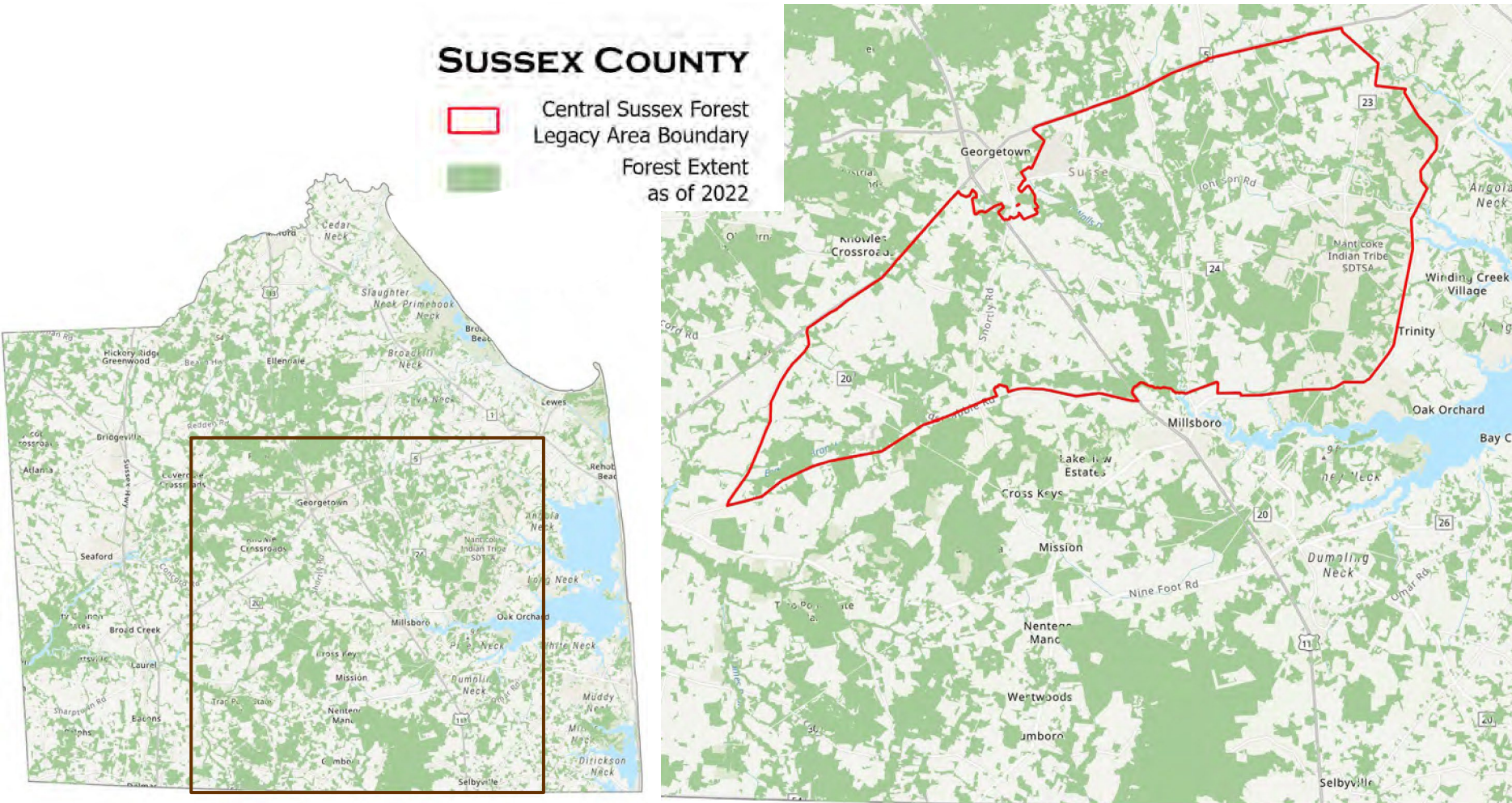
Total Land Area — [ SSPS “out of play”  
2022 LULC residential / commercial / industrial / institutional  
WetlandsManual QA/QC (i.e., remove subdivided but not yet built lots) ] = Developable Land Area

\* labels show acres of potentially developable land in Levels 1, 2 and 3 in each TID



# Environment – Land / Resources at Risk

## Delaware Statewide Forest Strategy



First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

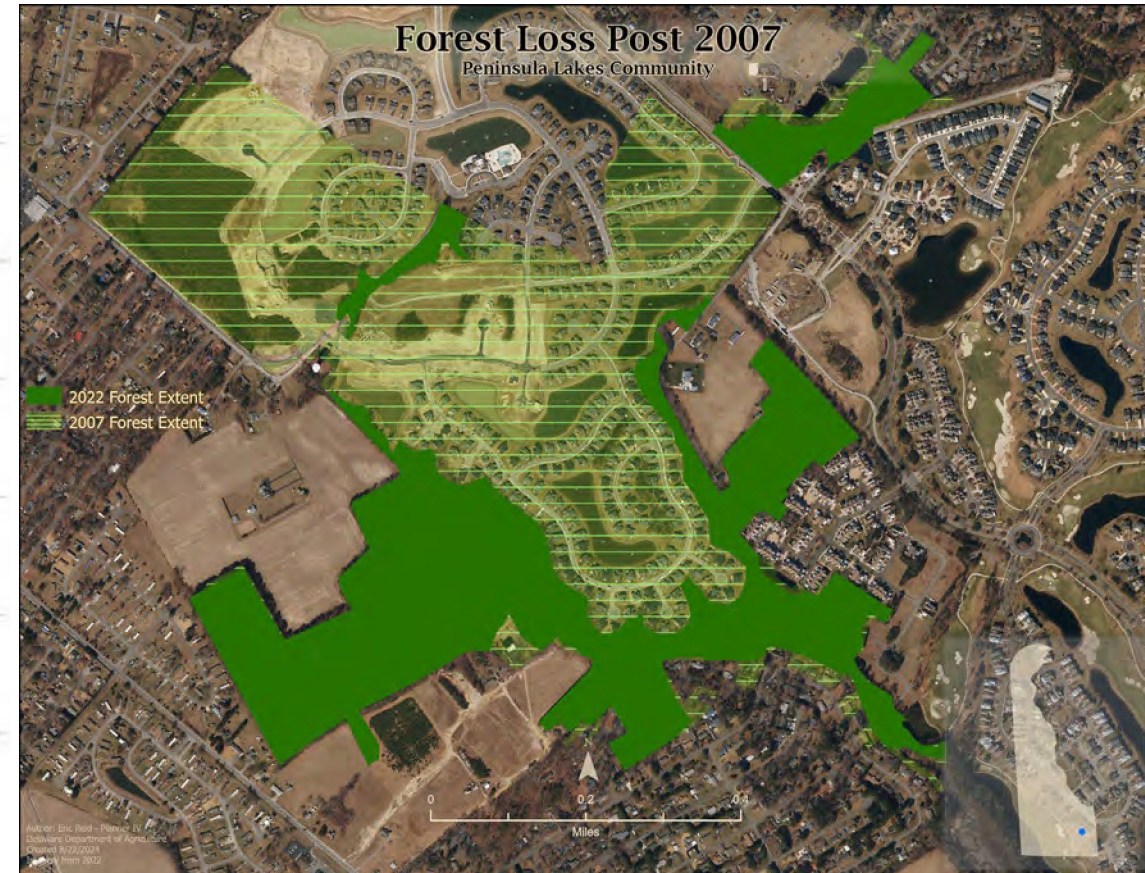
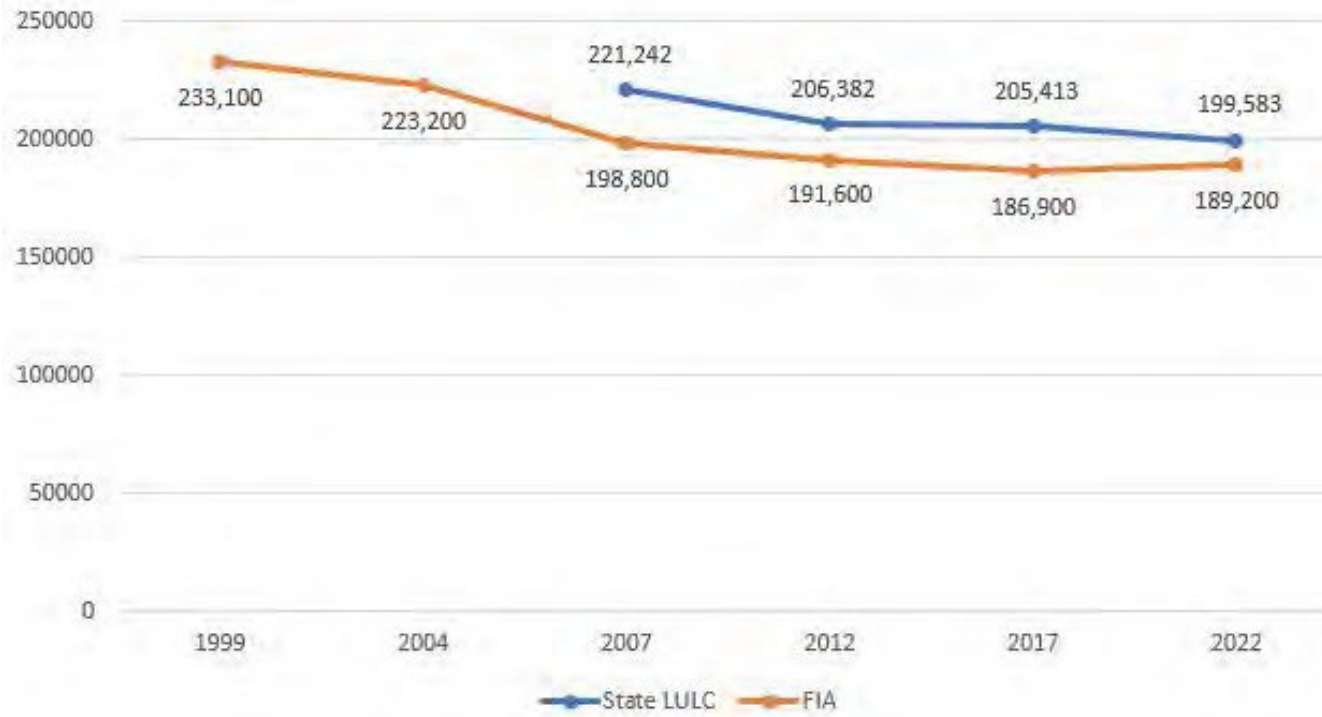
### 2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands



# Environment – Land / Resources at Risk

Total Forest Acres by Year, Sussex County



Land Use Land Cover data

LULC – Land Use Land Cover

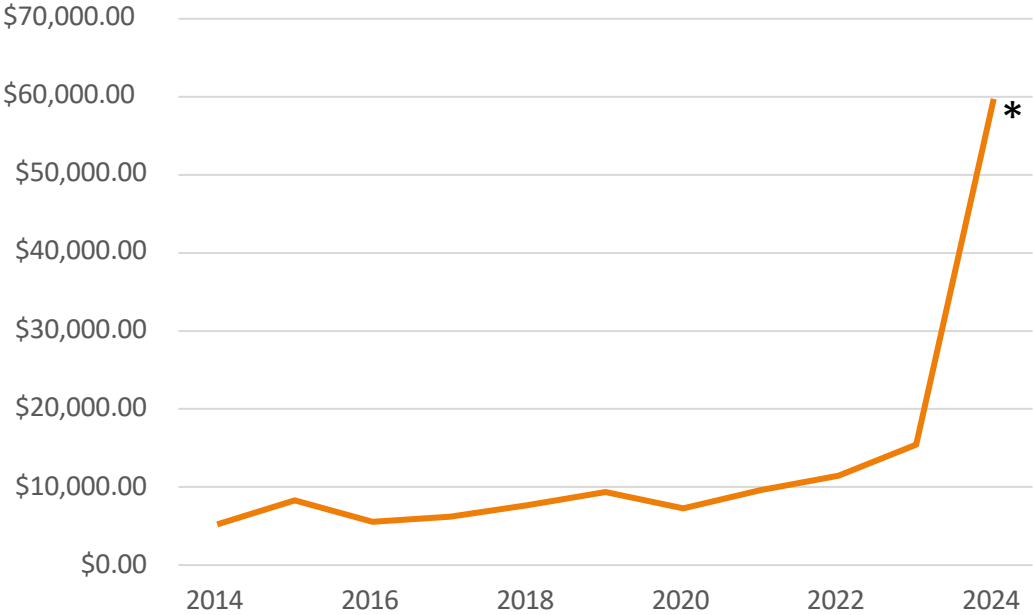
FIA - Forest Inventory and Analysis

Source: Forest Cover Data Analysis, 2024. Delaware Forest Service.



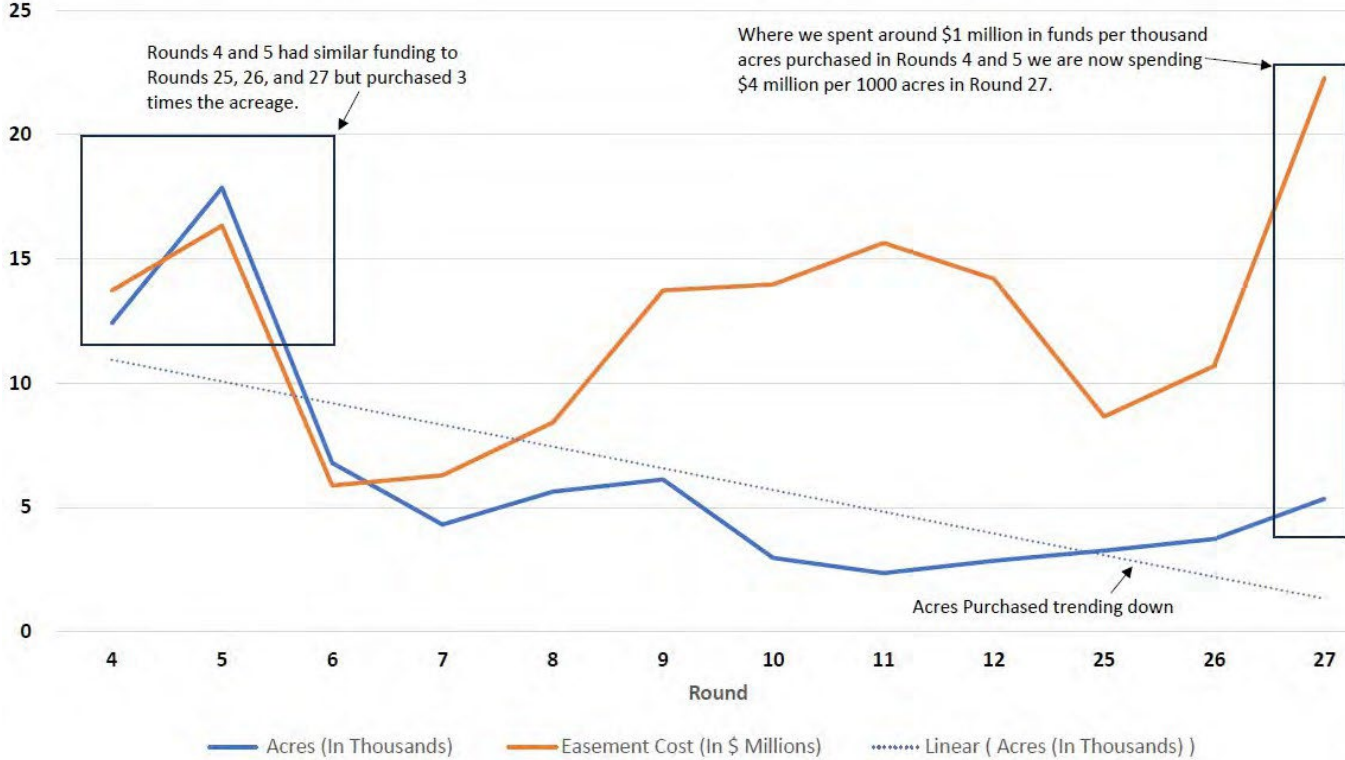
# Environment – Preservation Efforts and Challenges

Open Space Preservation - Price per acre



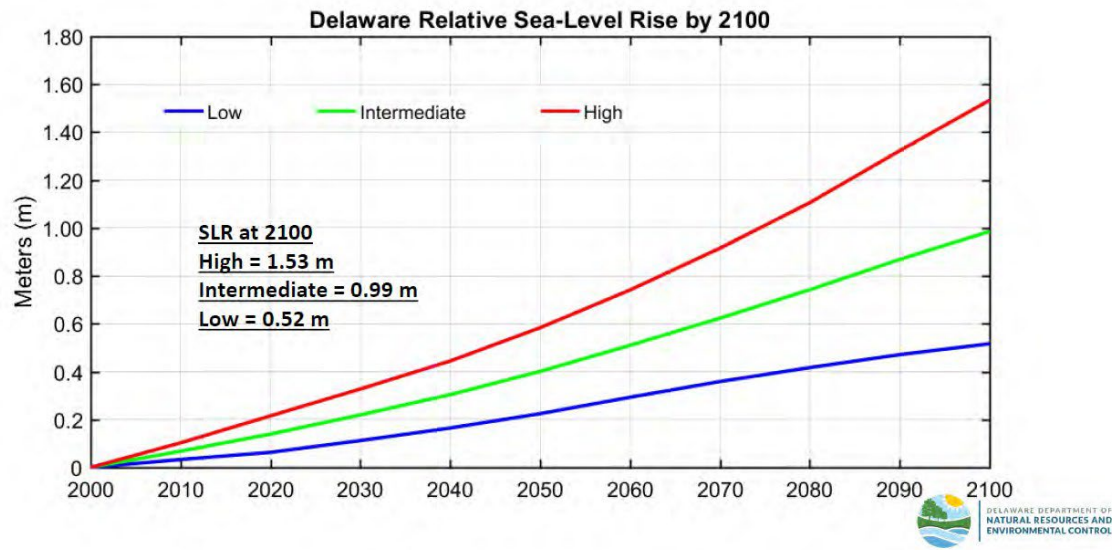
\*Note: Price spike in 2023 and 2024 due to a key 285-acre land purchase adjacent to White Clay Creek State Park.

Agricultural Land Preservation Program – Acres Purchased vs. Funds Spent

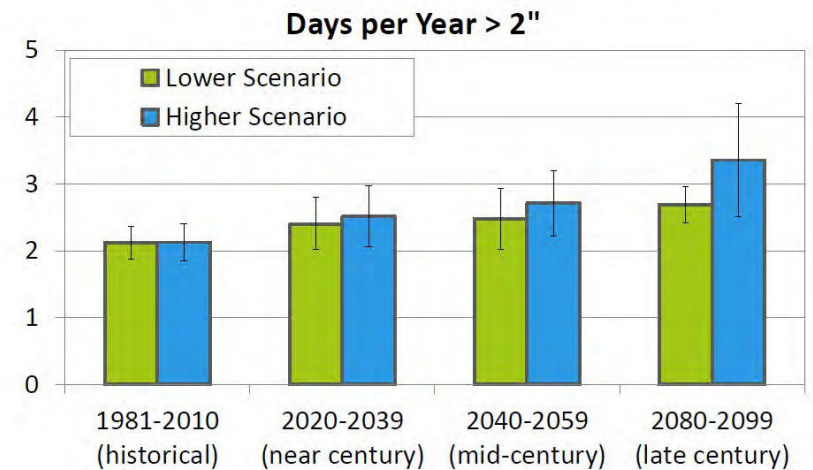


# Environment – Resiliency and Adaptation

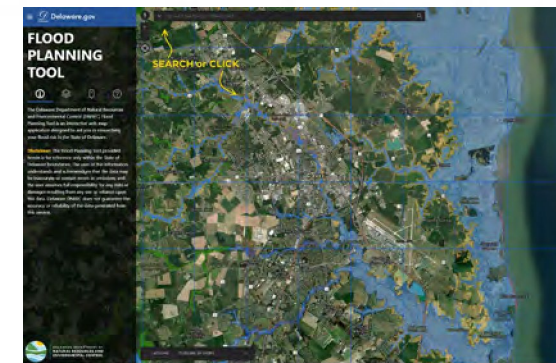
## Sea Levels will continue to rise



## Days with very heavy precipitation are expected to increase



- Marsh migration
- Saltwater intrusion
- Coastal development and infrastructure
- Accessibility – regular travel, emergency, and evacuation



# Housing – Statewide Needs

 **Root Policy Research**  
6740 E Colfax Ave, Denver, CO 80220  
www.rootpolicy.com  
970.880.1415

Delaware State Housing Authority  
**Statewide  
Housing Needs  
Assessment**

PREPARED FOR:  
Delaware State Housing Authority  
Dover, DE 19901  
www.destatehousing.com  
888-363-8808

CREATED  
November 2023

 **24,400\***  
**new residential  
housing units**  
are needed **by 2030** to  
meet expected growth.

 That's an  
average of  
**2,400**  
**new units**  
per year.

*\*These 24,400 units are in addition to the existing shortage of ~19,400 rental units affordable to households making 0-50% Area Median Income (AMI).*



**Where are these  
residential units needed?**

**4,016** New Castle County  
**6,941** Kent County  
**13,392** Sussex County

**Over half of these new builds need to be affordable for households below 100% AMI...**

 **12,723**  
**new residential  
housing units**  
must be affordable to households  
making less than 100% AMI  
(or \$66,400 for 2 people).

**7,523**  
**ownership units**



**5,200**  
**rental units**

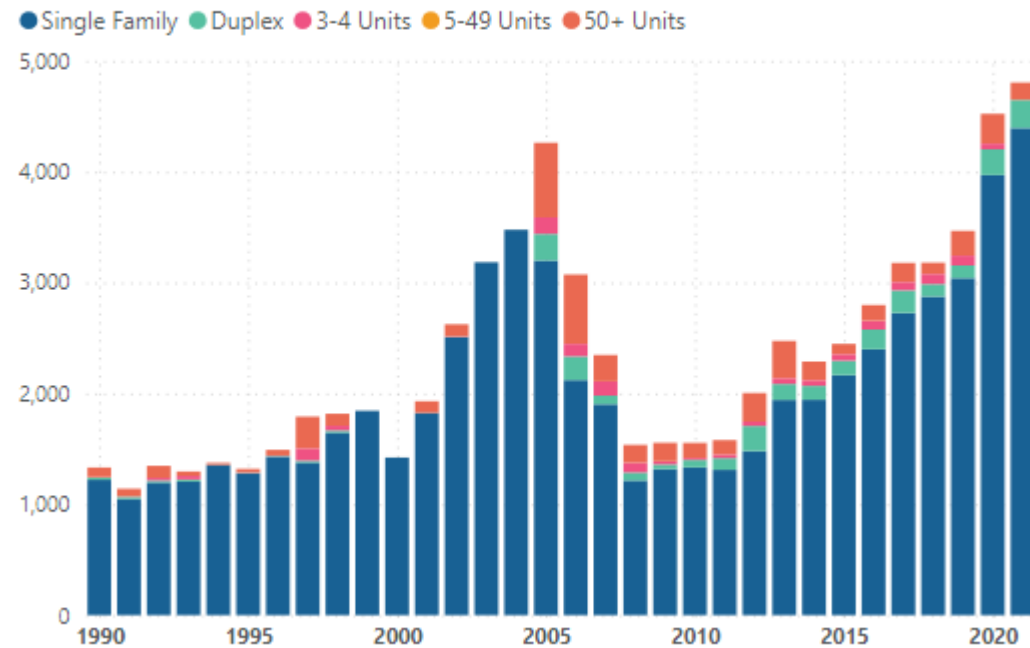


That's an average  
of **1,200 new  
units** per year.



# Housing – Sussex County

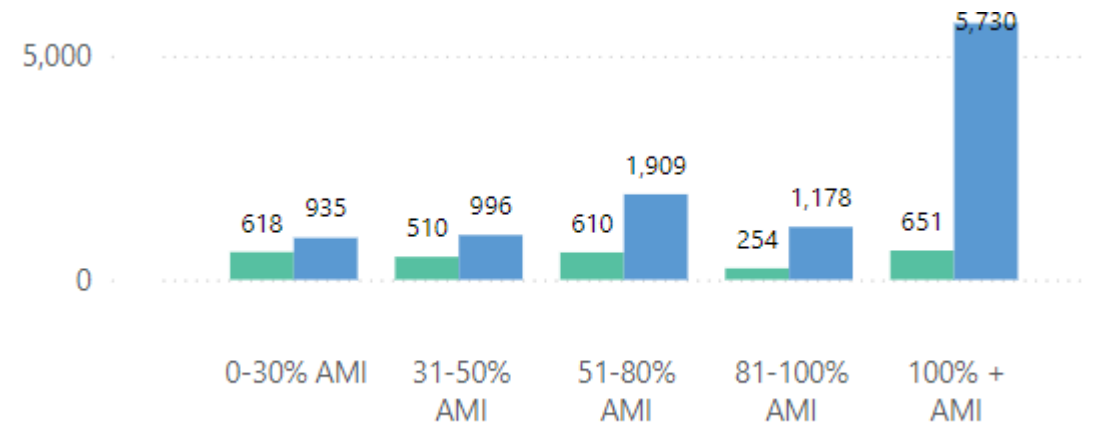
**New Units Permitted by Structure Type, 1990-2021**  
Sussex County



Source: U.S. Housing Production Report

**Only about 15% of the permitted units over the last 5 years were multi-family units, which suggest a greater diversity of housing is needed in the county.**

Projected new housing units needed by 2030:



Source: Delaware Population Consortium, HUD CHAS 2019 estimates, and Root Policy Research

● Rental Units Needed ● Ownership Units Needed

**Total: 13,392 needed, of which:**

- 80% should be for homeownership
- 20% should be for renters

In addition, Sussex is projected to need an additional 5,788 seasonal units

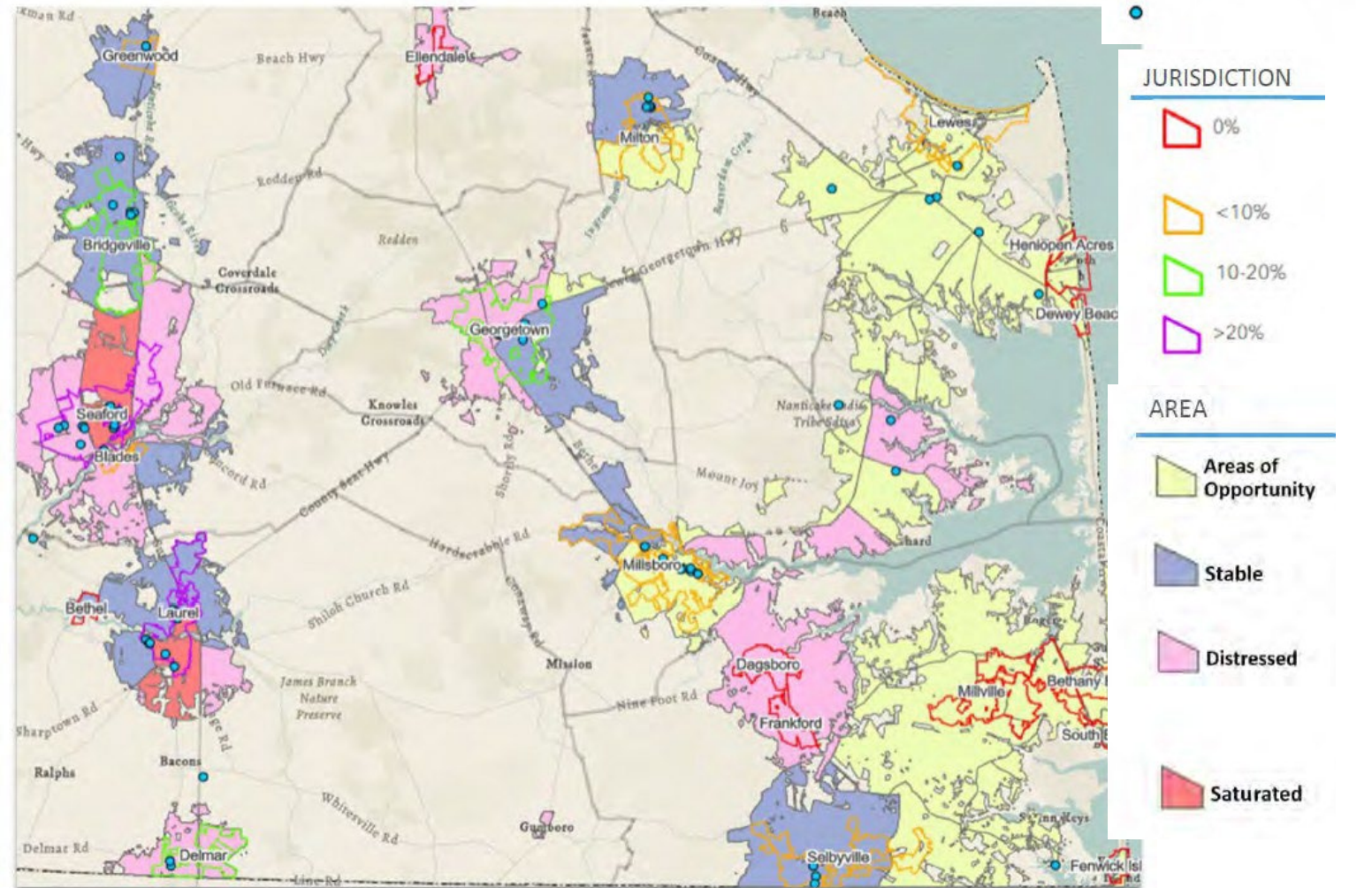


# Housing – Strategies

Sussex County

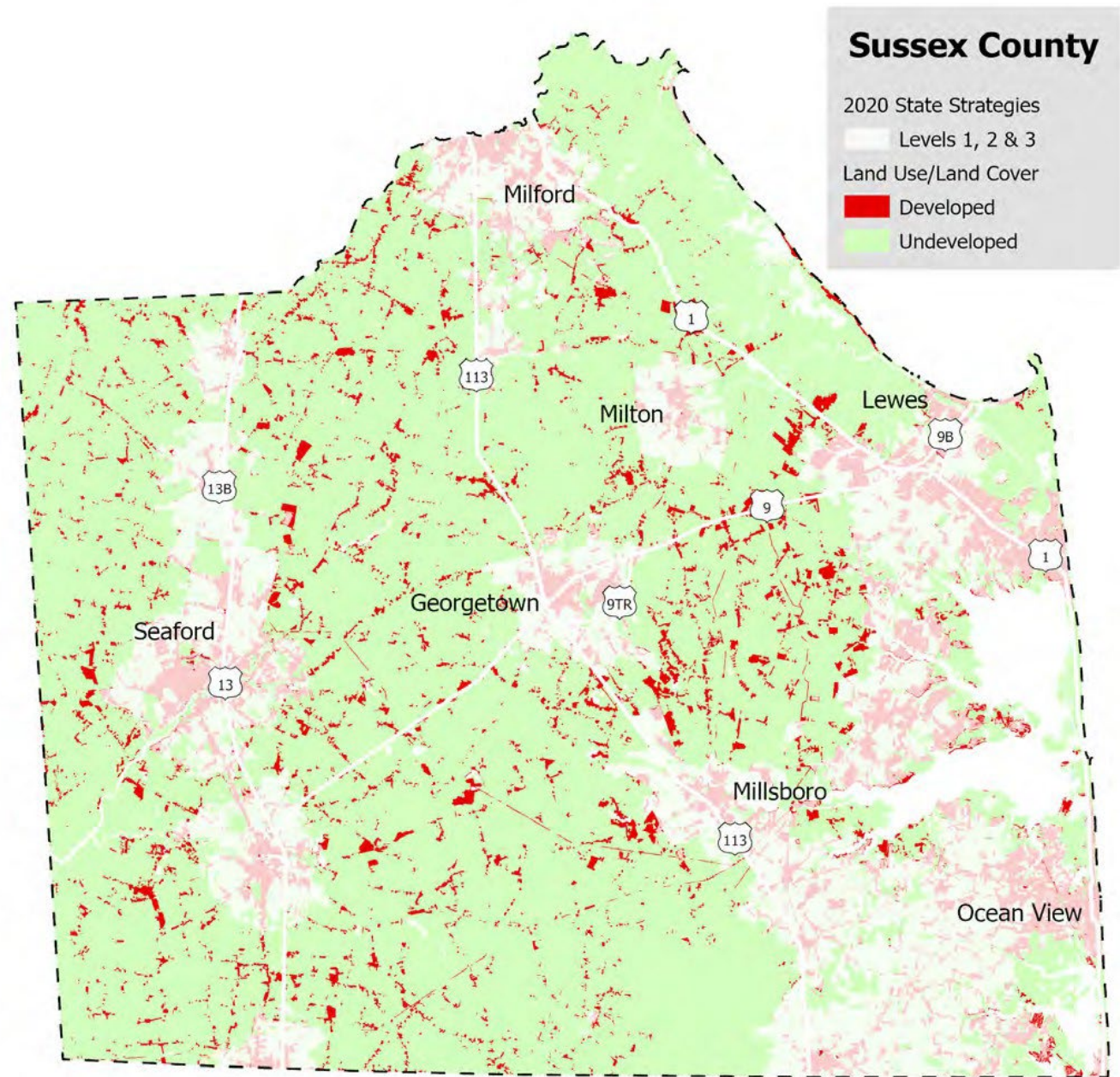
## Current distribution of affordable housing:

- Western Sussex County is saturated with affordable housing
  - bears more than *'equitable share'*
  - distressed areas need stabilization and supportive infrastructure
  - school proficiency is substantially lower than eastern half
- Coastal Resort Areas have very few affordable housing options (< 1%)
  - strong, presence of:
    - high-value markets
    - employment centers
    - high-performing schools
  - affordable housing should be encouraged in Areas of Opportunity



# Developed Land

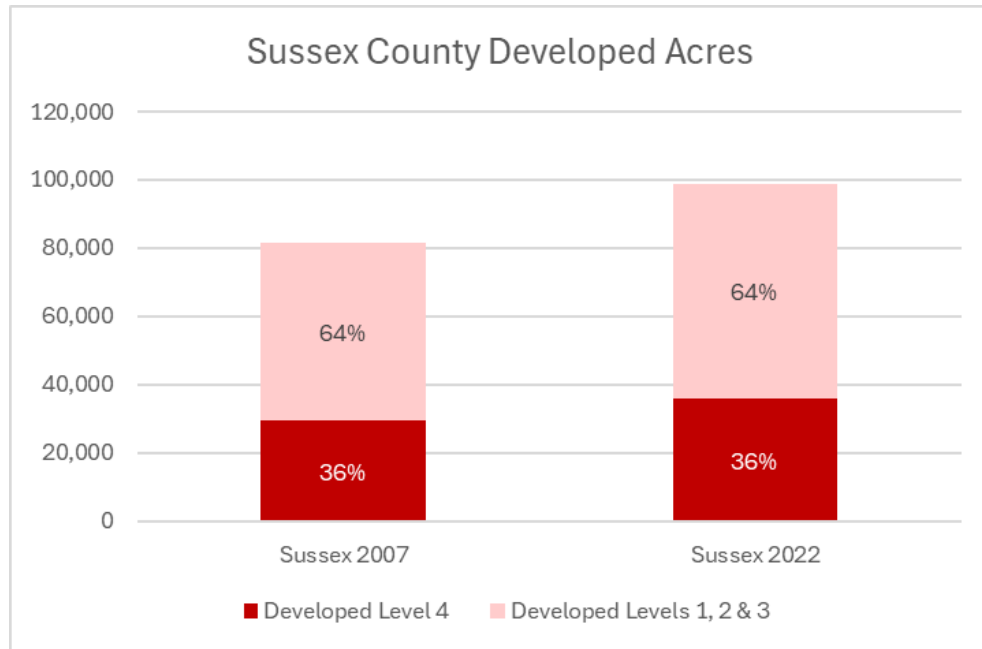
2007



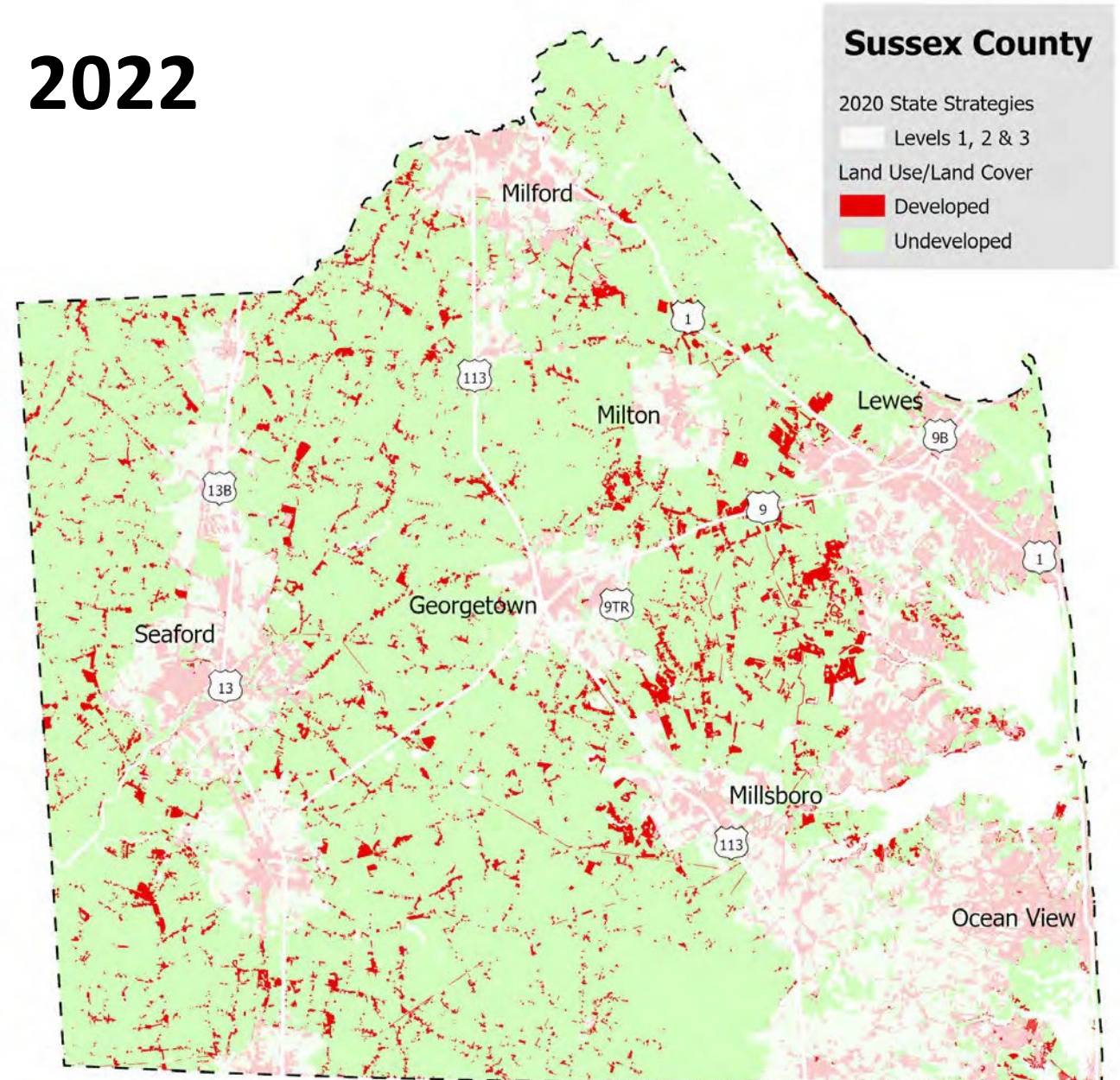


# Developed Land

- Between 2007 and 2022, about 17,000 acres were developed in Sussex County
- About 6,500 acres of that occurred in Level 4 areas



## 2022



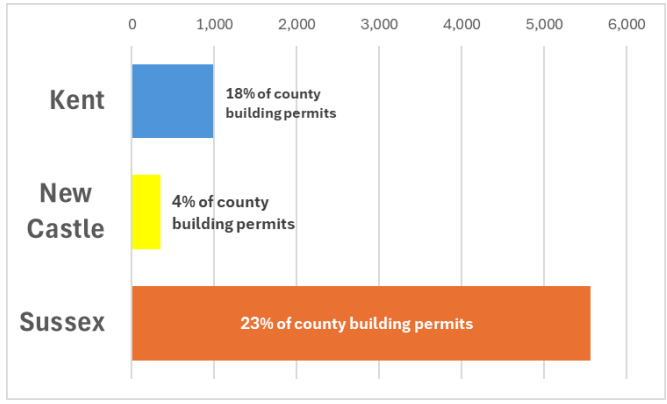


# 2024 Annual Report on State Planning Issues

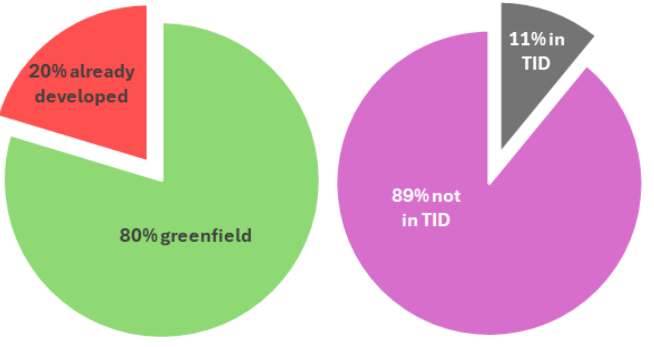




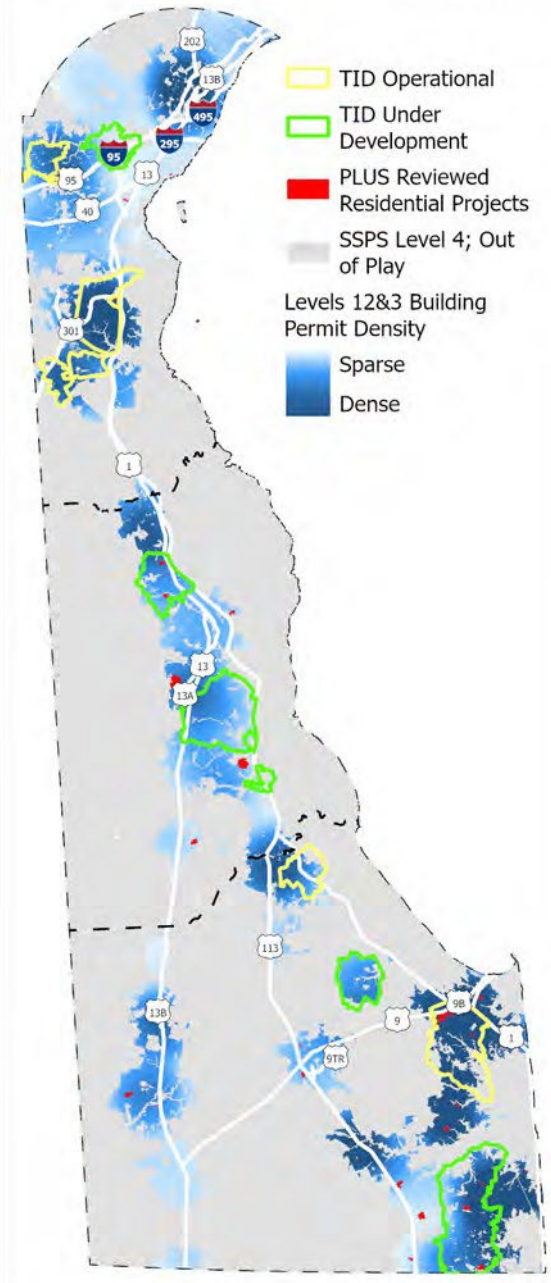
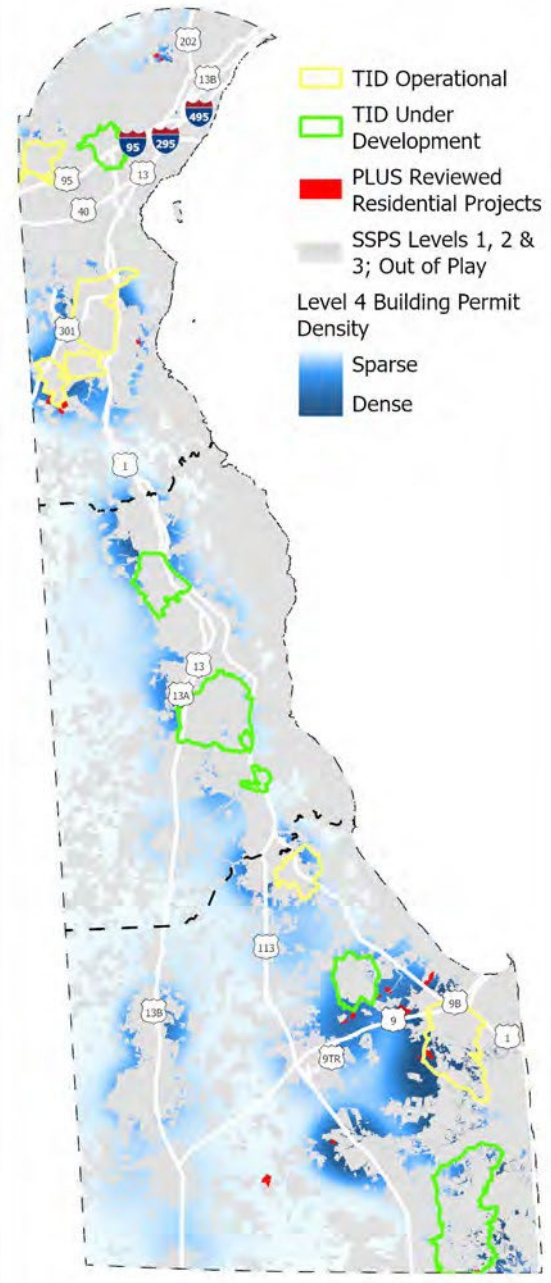
## Development Trends in Strategy Level 4



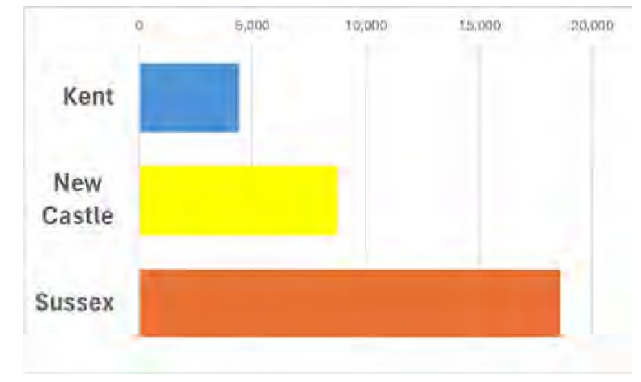
**Building Permits Level 4:**  
 6,886 residential units (18%)  
 765,659 non-residential sqft (3%)



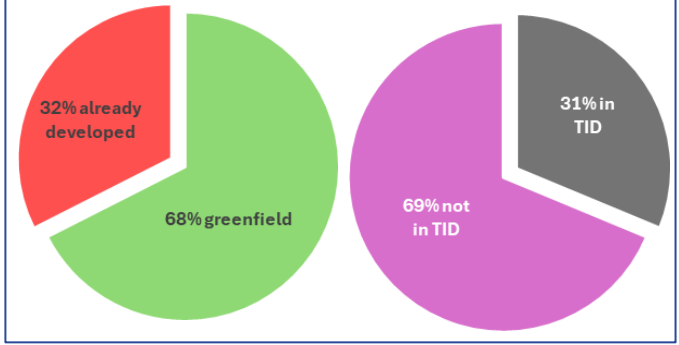
**Reviewed PLUS Dev't Level 4:**  
 8,685 residential units (46%)  
 814,100 non-residential sqft (13%)



## Development Trends in Strategy Levels 1, 2 and 3



**Building Permits Level 1, 2 & 3:**  
 31,751 residential units (82%)  
 25.5M non-residential sqft (97%)



**Reviewed PLUS Dev't Level 1, 2 & 3:**  
 10,353 residential units (54%)  
 5.4M non-residential sqft (87%)

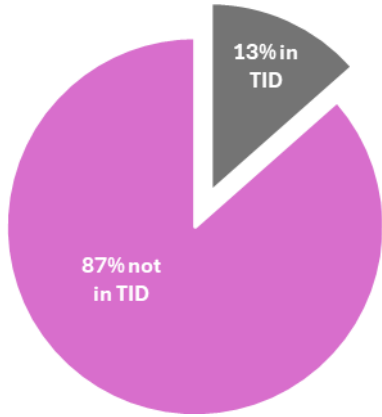
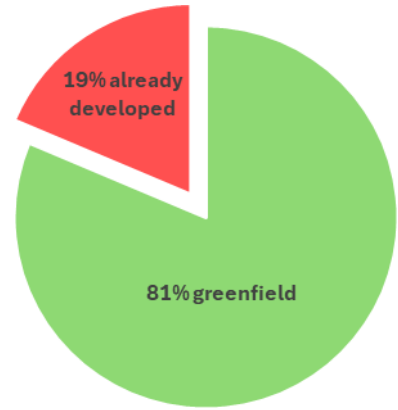
\*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

# Development Trends in Strategy Level 4

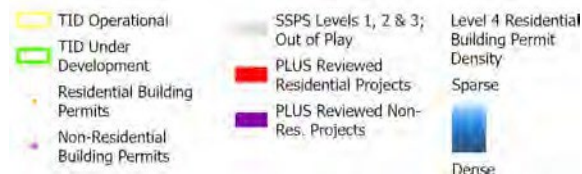
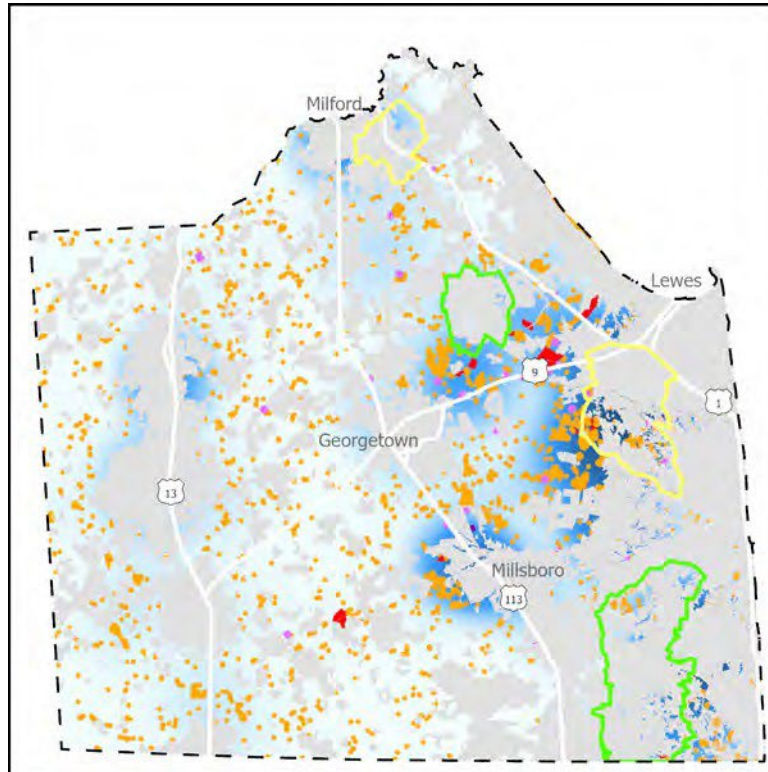
# SUSSEX COUNTY

# Development Trends in Strategy Levels 1, 2 and 3

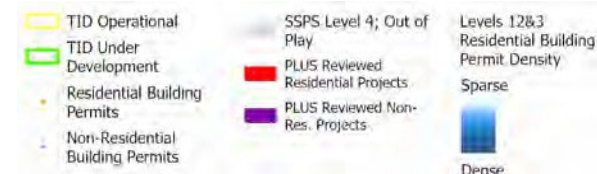
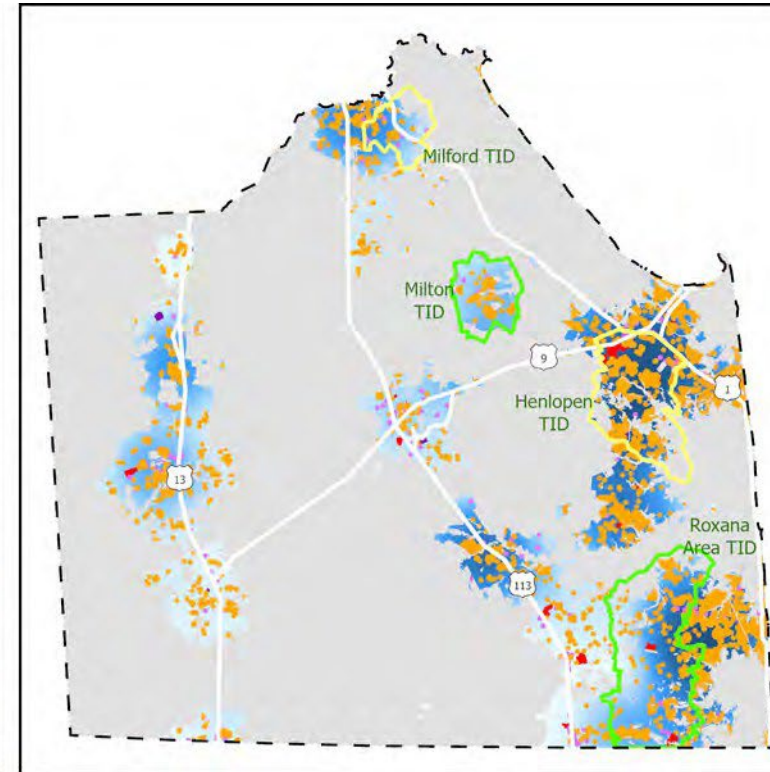
Building Permits Level 4:  
5,558 res. units (23%)  
547,591 non-res. sqft (11%)



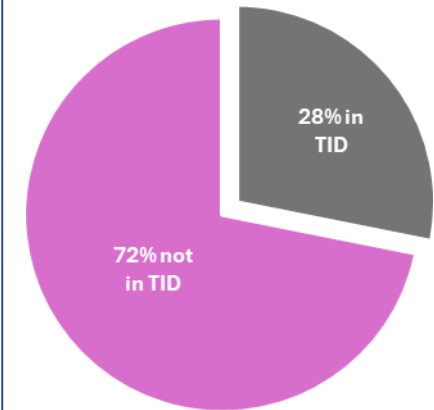
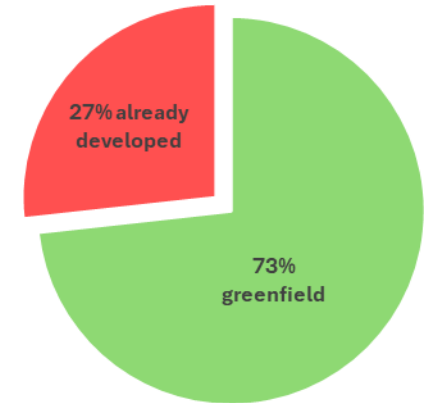
Reviewed PLUS Dev't Level 4:  
7,410 residential units (58%)  
845,145 non-residential sqft (20%)



Reviewed PLUS Dev't Level 1, 2 & 3:  
5,394 residential units (42%)  
3.5M non-residential sqft (80%)



Building Permits Level 1, 2 & 3:  
18,585 res. units (77%)  
4.5M non-res. sqft (89%)



\*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

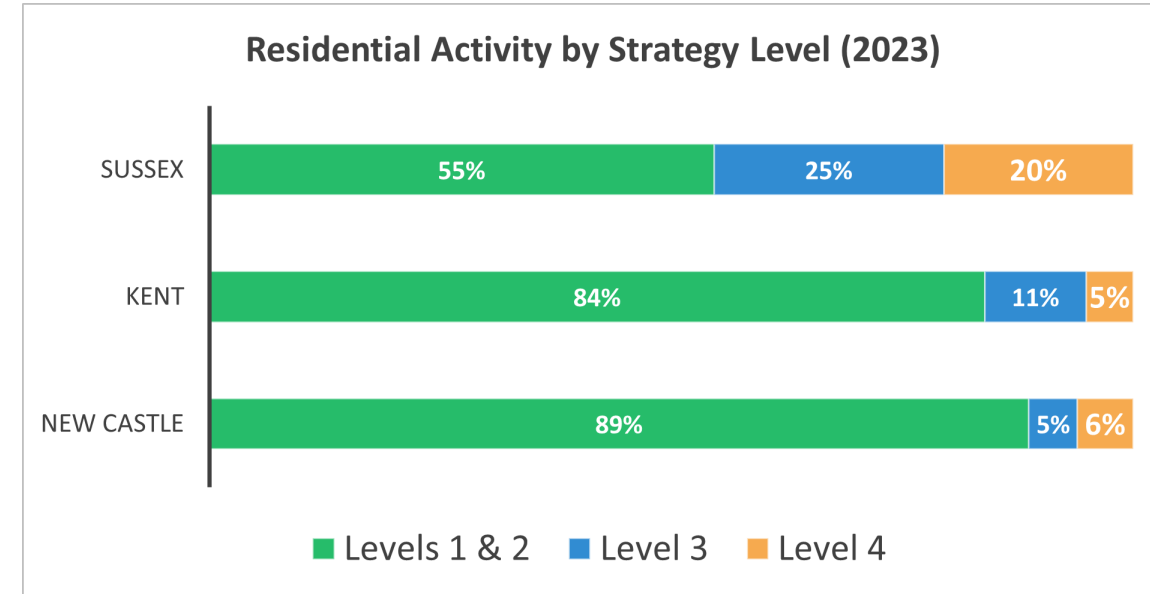
## Growth by County 2019-2023

### Residential Units by State Strategy Level in Development Applications

County	Levels 1 & 2	Level 3	Level 4	All Levels
<b>Residential Units, 2019-2023</b>				
New Castle County	7,247	440	266	7,953
Kent County	3,851	461	35	4,347
Sussex County	10,807	4,508	5,530	20,845
<b>Totals</b>	<b>21,905</b>	<b>5,409</b>	<b>5,831</b>	<b>33,145</b>

### Residential Units by State Strategy Level in Building Permits

County	Levels 1 & 2	Level 3	Level 4	All Levels
<b>Residential Units, 2019-2023</b>				
New Castle County	8,128	631	469	9,228
Kent County	4,028	386	1,051	5,465
Sussex County	12,307	6,278	5,686	24,271
<b>Totals</b>	<b>24,463</b>	<b>7,295</b>	<b>7,206</b>	<b>38,964</b>



2019 – 2023, Sussex accounts for **86%** of Level 4 development

# Conclusions and Discussion

What resonates? What is your experience?



# Data Insight: Conclusions

- Level 4 development = Sprawl
- Level 4 development is unsustainable

## What are the implications?

- Inefficiencies and rising costs to provide the infrastructure
- Associated impacts:
  - Increasing motor vehicle traffic and vehicle miles traveled
  - Affordable housing (living) challenges
  - Environmental degradation (forest, ecosystem, water, etc.)
  - Risk (in light of climate change)
  - “Crowding out” of industry, farming

### Development Trends by Strategy Level

Development Trend data 2019-2023 with PLUS data 2019-September 2024

Residential Building Permits

**5,558**

Total Units - Level 4

Non-residential Building Permits

**547,591**

Sq. Feet - Level 4

Residential Dev Apps

**5,507**

Total Units - Level 4

Non-residential Dev Apps

**69,235**

Sq. Feet - Level 4

Residential PLUS Projects

**14,567**

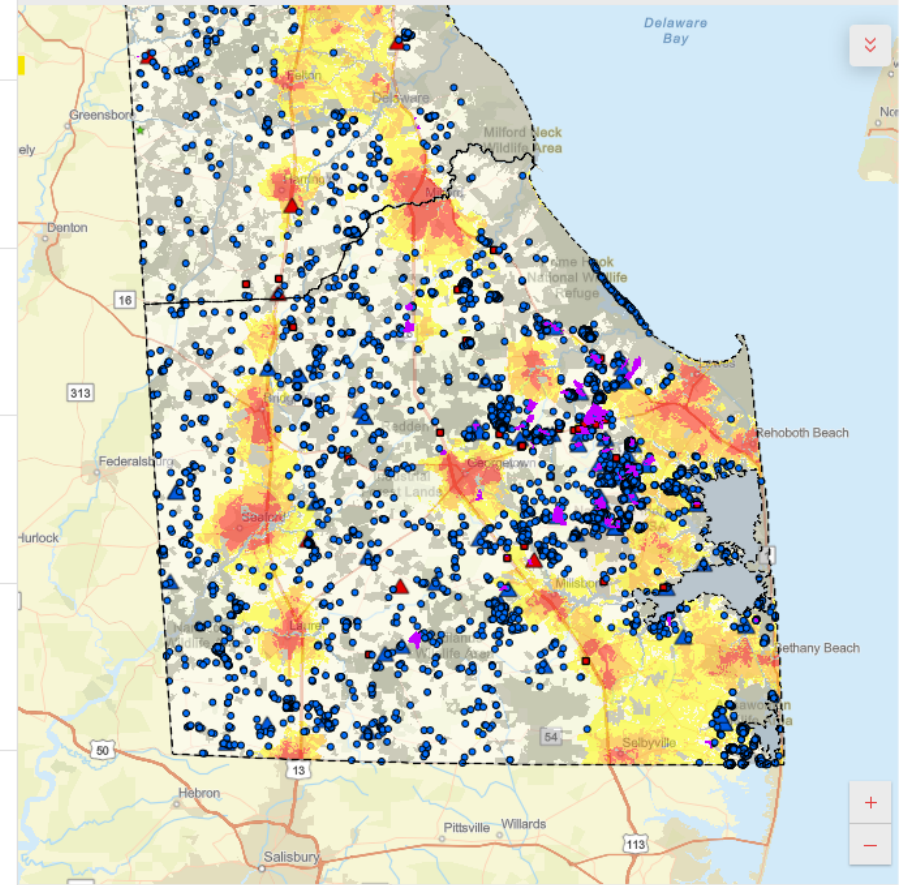
Total Units - Level 4

Non-residential PLUS Projects

**1,620,453**

Sq. Feet - Level 4

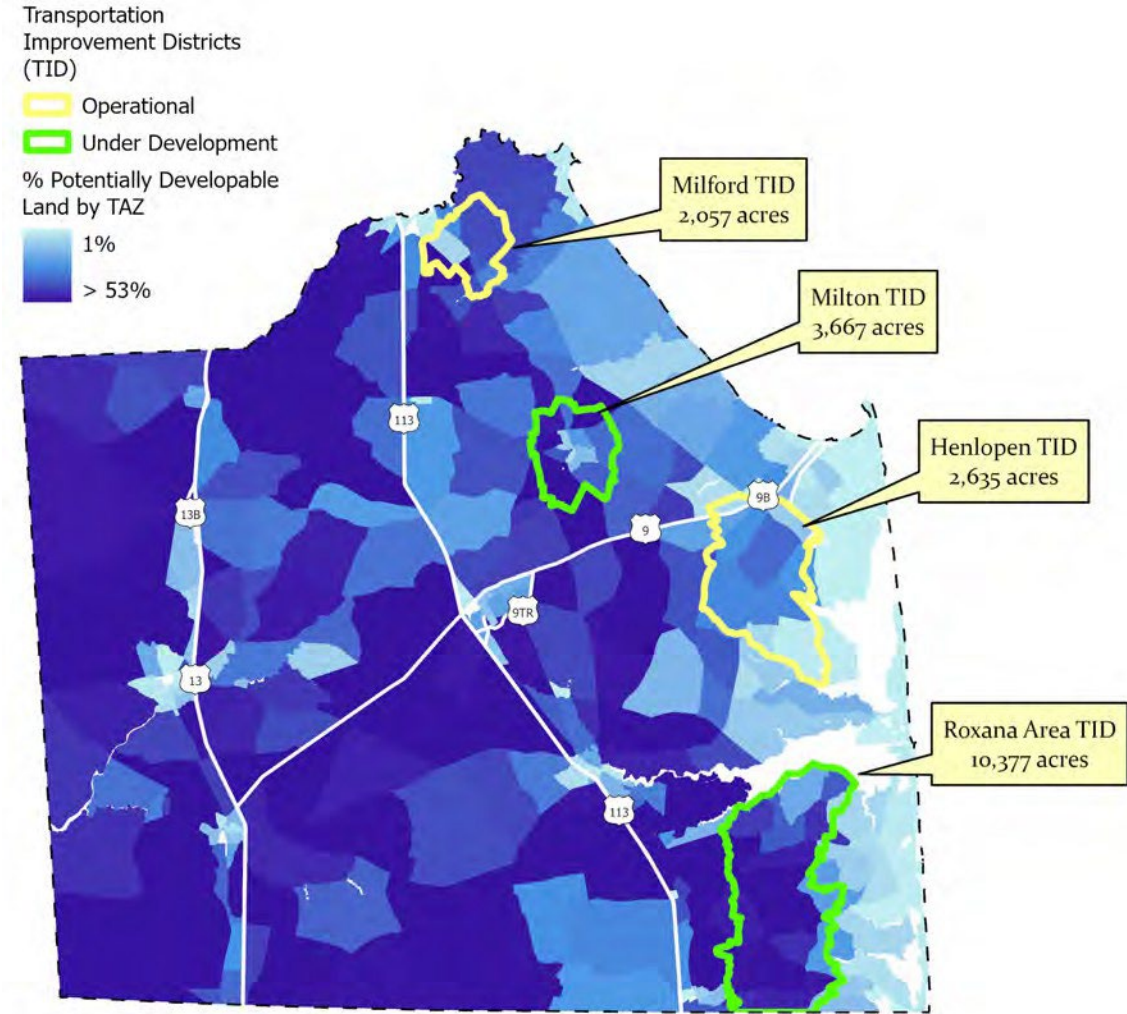
### Development Trends in Strategy Level 4



# Concluding Points

Transportation Improvement District (TID)	Forecast Year	Dwelling Units	
		SUPPLY	DEMAND
SUSSEX	SE Milford	8,864	39,633
	Henlopen	13,000	
	Milton	4,972	
	Roxana Area	12,797	

- Greenfield development in TIDs plus redevelopment and infill should accommodate significantly more development than what is forecasted by the Delaware Population Consortium



\* labels show acres of potentially developable land in Levels 1, 2 and 3 in each TID