

Appendix A: Development Trends Analysis

Prepared for Governor Carney and the 151st Delaware General Assembly
Prepared by the Cabinet Committee on State Planning Issues

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Residential Trends

Table A.1 Residential units approved in development applications, by county, 2017-2021

County	2017	2018	2019	2020	2021	Total
New Castle	1,808	2,097	2,161	2,555	1,450	10,071
Kent	309	451	728	1,016	421	2,925
Sussex	738	5,000	2,533	2,793	3,822	14,886
Total	2,855	7,548	5,422	6,364	5,693	27,882

Table A.2 Residential units approved in building permit, by county, 2017-2021

County	2017	2018	2019	2020	2021	Total
New Castle	1,979	1,313	1,647	2,299	2,221	9,459
Kent	1,297	1,193	1,070	1,318	1,008	5,886
Sussex	3,055	3,838	4,099	5,582	5,256	21,830
Total	6,331	6,344	6,816	9,199	8,485	37,175

Development Applications

Table A.3 Residential units approved in development applications, by local jurisdiction, 2017-2021

Jurisdiction	2017	2018	2019	2020	2021	Total
New Castle County*	944	1,088	1,217	2,409	471	6129
Delaware City	-	-	-	121	-	121
Middletown	854	948	425	-	541	2768
New Castle	-	-	-	-	-	0
Newark	7	23	512	21	232	795
Wilmington	3	38	7	4	206	258

New Castle Total	1,808	2,097	2,161	2,555	1,450	10,071
Kent County*	-	394	4	548	216	1162
Clayton	-	-	-	54	-	54
Dover	7	4	719	5	54	789
Frederica	299	-	-	-	-	299
Milford	3	-	2	408	119	532
Smyrna	-	53	3	1	32	89
Kent Total	309	451	728	1,016	421	2925
Sussex County*	128	3,903	1,890	837	2,219	8,977
Bridgeville	-	-	-	-	152	152
Dewey Beach	-	-	-	-	-	0
Georgetown	-	138	-	-	3	141
Greenwood	-	17	-	-	-	17
Laurel	-	-	-	9	415	424
Lewes	2	-	148	2	91	243
Milford	1	37	266	50	-	354
Millsboro	-	-	3	163	63	229
Millville	551	223	-	455	671	1900
Milton	-	-	-	84	136	220
Ocean View	56	137	36	-	-	229
Seaford	-	314	8	190	-	512
Selbyville	-	231	182	1,003	72	1488
Sussex Total	738	5,000	2,533	2,793	3,822	14,886
State Total	2,855	7,548	5,422	6,364	5,693	27,882

*Represents development applications in unincorporated areas of the county

Building Permits

Table A.4 Residential units approved in building permits, by local jurisdiction, 2017–2021

Jurisdiction	2017	2018	2019	2020	2021	Total
New Castle County*	1,204	1,003	1,151	1,128	1,112	5,598
Bellefonte	-	-	-	-	-	0
Delaware City	-	2	17	22	21	62
Elsmere	-	5	5	-	-	10
Middletown	333	178	321	356	179	1367
New Castle	2	3	4	2	9	20
Newark	90	56	78	353	181	758
Odessa	1	-	-	-	-	1
Townsend	43	31	31	20	1	126
Wilmington	306	35	40	418	718	1517
New Castle Total	1,979	1,313	1,647	2,299	2,221	9,459
Kent County*	618	618	652	769	580	3237
Bowers Beach	-	1	1	-	-	2
Camden	25	22	68	98	-	213
Cheswold	41	46	17	43	41	188
Clayton	44	58	43	28	89	262
Dover	383	208	49	73	83	796
Farmington	-	1	-	-	-	1
Felton	2	10	8	8	10	38
Frederica	21	21	6	7	3	58
Harrington	11	13	17	36	34	111
Hartly	-	1	-	-	-	1
Houston	1	-	-	-	-	1
Kenton	1	2	8	5	1	17
Leipsic	1	-	1	-	-	2

Milford	6	5	7	20	23	61
Smyrna	119	174	162	174	103	732
Woodside	1	-	-	1	-	2
Wyoming	23	13	31	56	41	164
Kent Total	1,297	1,193	1,070	1,318	1,008	5,886
Sussex County*	2,219	2,889	2,946	4,319	3,845	16,218
Bethany Beach	24	14	22	13	29	102
Bethel	4	4	2	-	1	11
Blades	1	-	-	-	-	1
Bridgeville	46	16	31	68	120	281
Dagsboro	10	8	13	15	10	56
Delmar	8	60	62	9	3	142
Dewey Beach	7	34	5	-	4	50
Ellendale	9	14	12	9	16	60
Fenwick Island	10	5	6	5	14	40
Frankford	2	4	6	8	3	23
Georgetown	2	27	153	4	13	199
Greenwood	4	2	-	-	4	10
Henlopen Acres	2	1	1	-	1	5
Laurel	2	2	5	10	11	30
Lewes	9	14	26	27	41	117
Milford	98	123	-	332	213	766
Millsboro	171	145	244	266	303	1129
Millville	145	92	167	183	202	789
Milton	32	49	44	48	44	217
Ocean View	107	152	158	124	73	614
Rehoboth Beach	34	39	36	17	35	161
Seaford	14	45	49	69	151	328
Selbyville	81	84	95	40	102	402
Slaughter Beach	1	3	5	-	-	9

South Bethany	13	12	11	16	18	70
Sussex Total	3,055	3,838	4,099	5,582	5,256	21,830
State Total	6,331	6,344	6,816	9,199	8,485	37,175

*Represents development applications in unincorporated areas of the county

Relationship to State Strategies

The OSPC and other state agencies seek to encourage development (both residential and non-residential) in Investment Levels 1 and 2 as defined by the State Strategies map, and to steer development away from Level 4. The location of proposed and actual development is an important indicator of the efficacy of these state-level policies on local development trends. Table A.5 summarizes residential housing units in development applications for the five-year period, 2017 – 2021, by county, for the entire state, and by State Strategies investment level.

Table A.5 Residential housing units based on development applications, by county and statewide, by State Strategies investment level, 2017–2021

County	2017	2018	2019	2020	2021	Total
New Castle	Units	Units	Units	Units	Units	Total Units
Level 1 & 2	1,707	1,720	1,964	2,231	1,390	7,954
Level 3	87	238	172	173	9	675
Level 4	14	139	25	151	51	339
New Castle Total	1,808	2,097	2,161	2,555		9968
Kent						
Level 1 & 2	309	451	693	758	421	2656
Level 3	-	-	-	258	-	258
Level 4	-	-	35	-	-	35
Kent Total	309	451	728	1,016	421	4499
Sussex						
Level 1 & 2	625	1,326	648	1,789	1,594	4,672
Level 3	105	2,322	519	832	1,022	4,000
Level 4	8	1,352	1,366	172	1,206	3,260
Sussex Total	738	5,000	2,533	2,793	3,822	11,932
Delaware						

Level 1 & 2	2,641	3,497	3,305	4,778	3,405	15,282
Level 3	192	2,560	691	1,263	1,031	4,933
Level 4	22	1,491	1,426	323	1,257	3,634
State Total	2,855	7,548	5,422	6,364	5,693	23,849

Table A.6 Residential housing units based on building permits, by county and statewide, by *State Strategies* investment level, 2017–2021.

County	2017	2018	2019	2020	2021	Total
New Castle	Units	Units	Units	Units	Units	Total Units
Level 1 & 2	1,779	1,141	1,541	2,102	1,960	8,583
Level 3	148	126	69	124	141	585
Level 4	52	46	37	73	120	261
New Castle Total	1,979	1,313	1,647	2,299	2,221	9,429
Kent						
Level 1 & 2	994	939	809	980	740	5168
Level 3	72	50	58	64	50	390
Level 4	231	204	203	274	218	1319
Kent Total	1,297	1,193	1,070	1,318	1,008	5,974
Sussex						
Level 1 & 2	1,503	2,043	2,147	2,716	2,597	11,273
Level 3	694	737	931	1,531	1,300	4,953
Level 4	858	1,058	1,021	1,335	1,359	5,763
Sussex Total	3,055	3,838	4,099	5,582	5,256	19,214
Delaware						
Level 1 & 2	4,276	4,123	4,497	5,798	5,297	27,014
Level 3	914	913	1,058	1,719	1,491	6,037
Level 4	1,141	1,308	1,261	1,682	1,697	7,380
State Total	6,331	6,344	6,816	9,199	8,485	34,617

Figure A.3 Residential development, proportion by *State Strategies* level, by county, 2017–2021

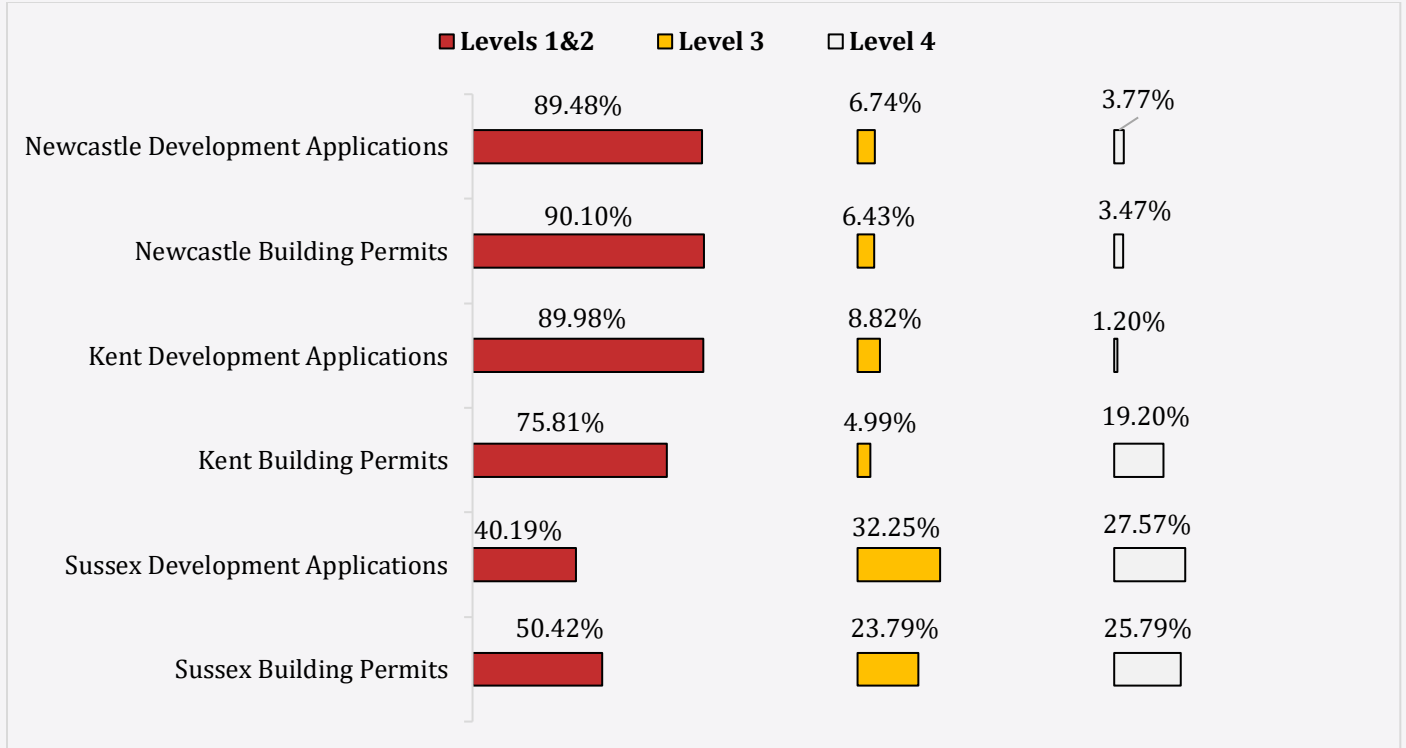
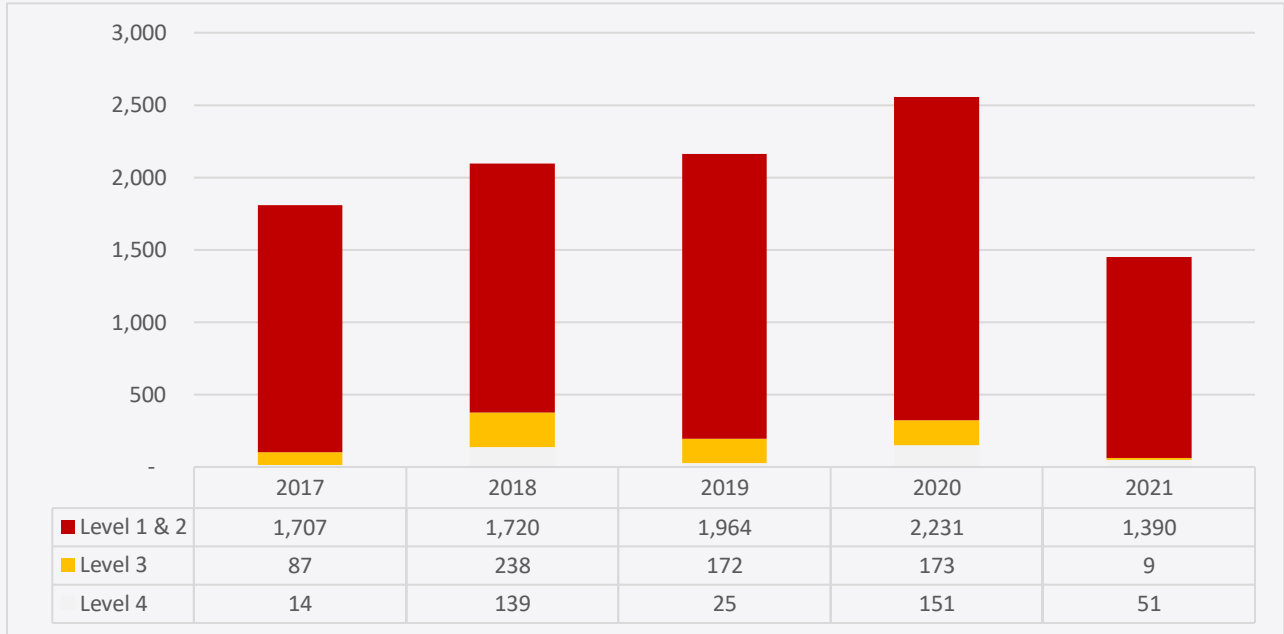
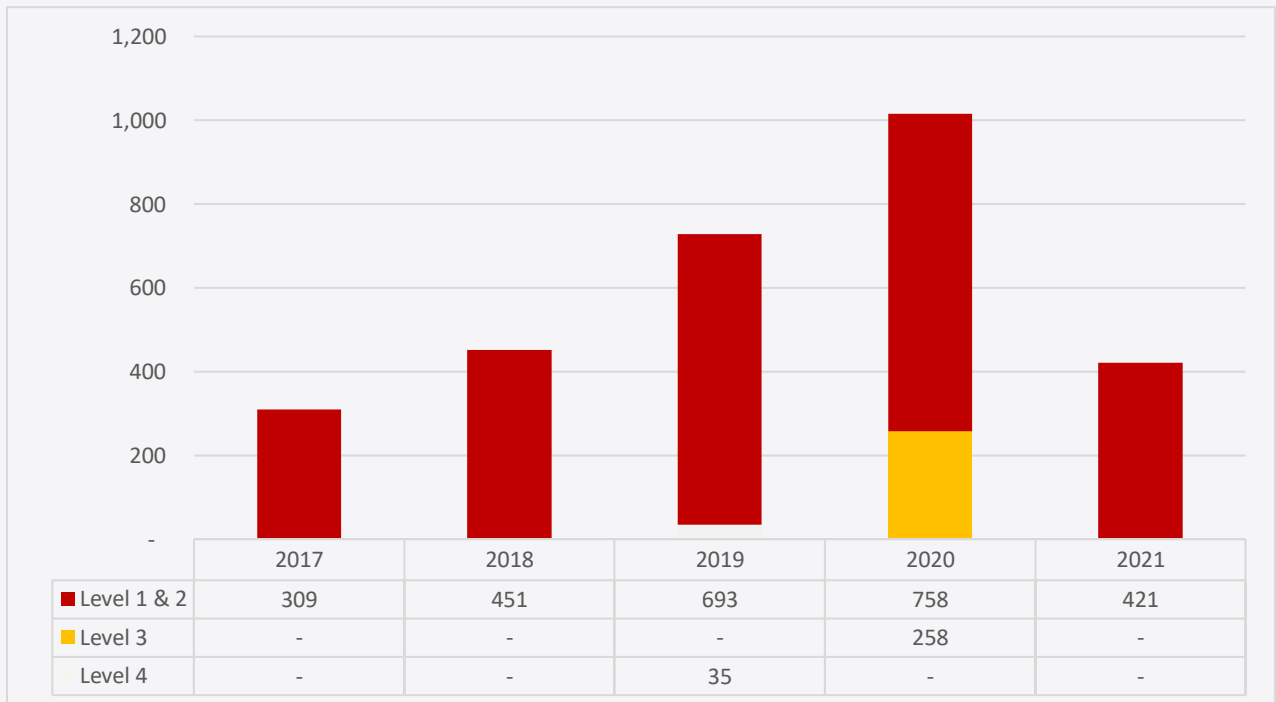


Figure A.4 Residential units in development applications and building permits, by county and State Strategy level, 2017–2021

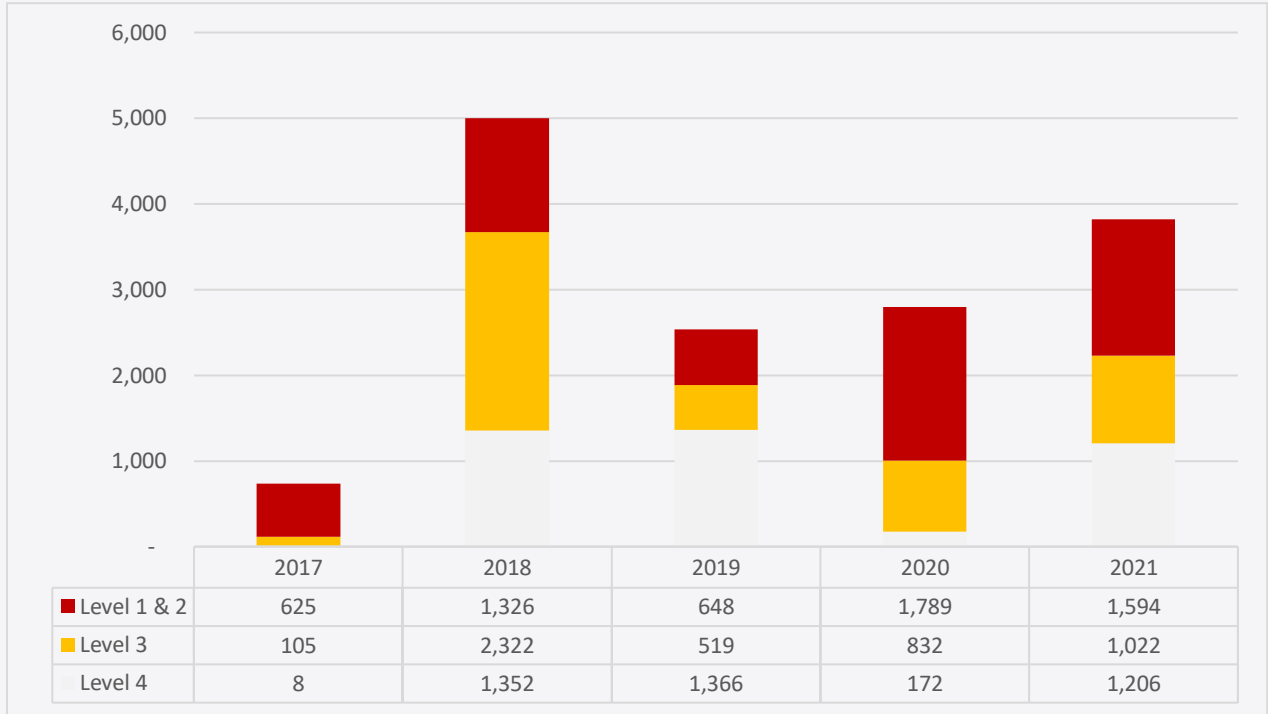
Residential Development Applications, New Castle County



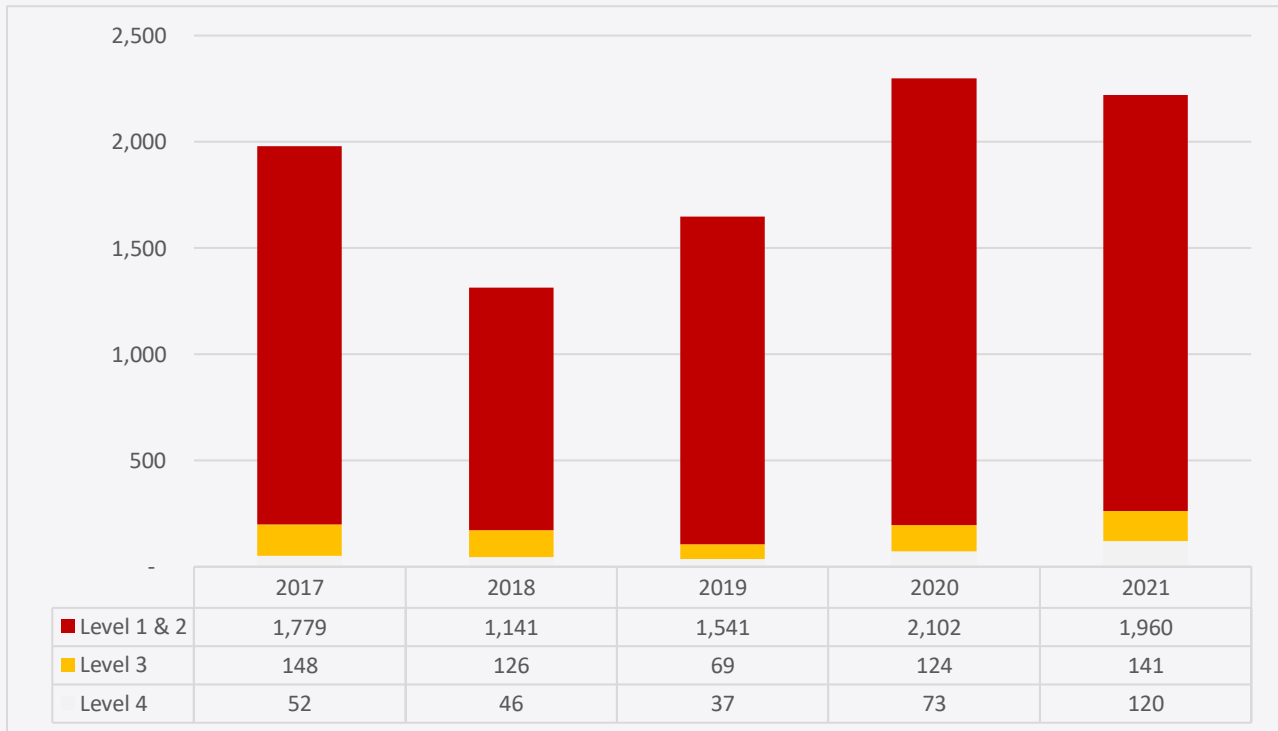
Residential Development Applications, Kent County



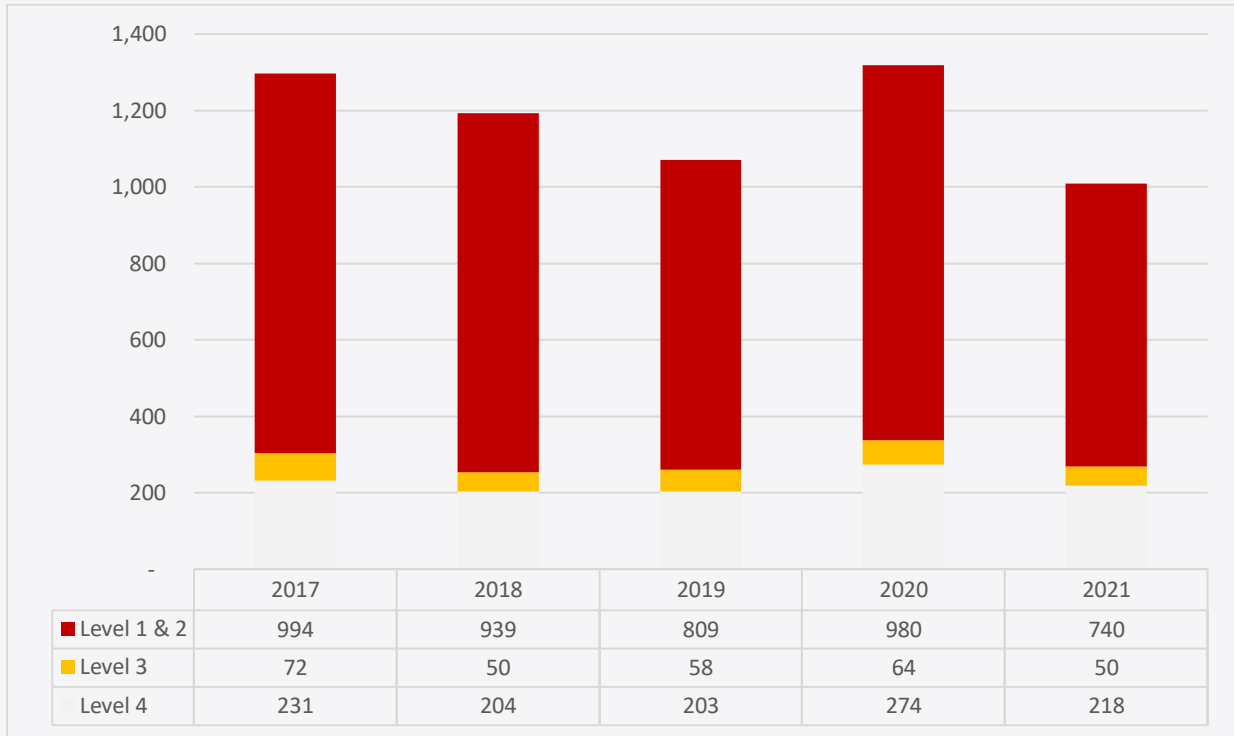
Residential Development Applications, Sussex County



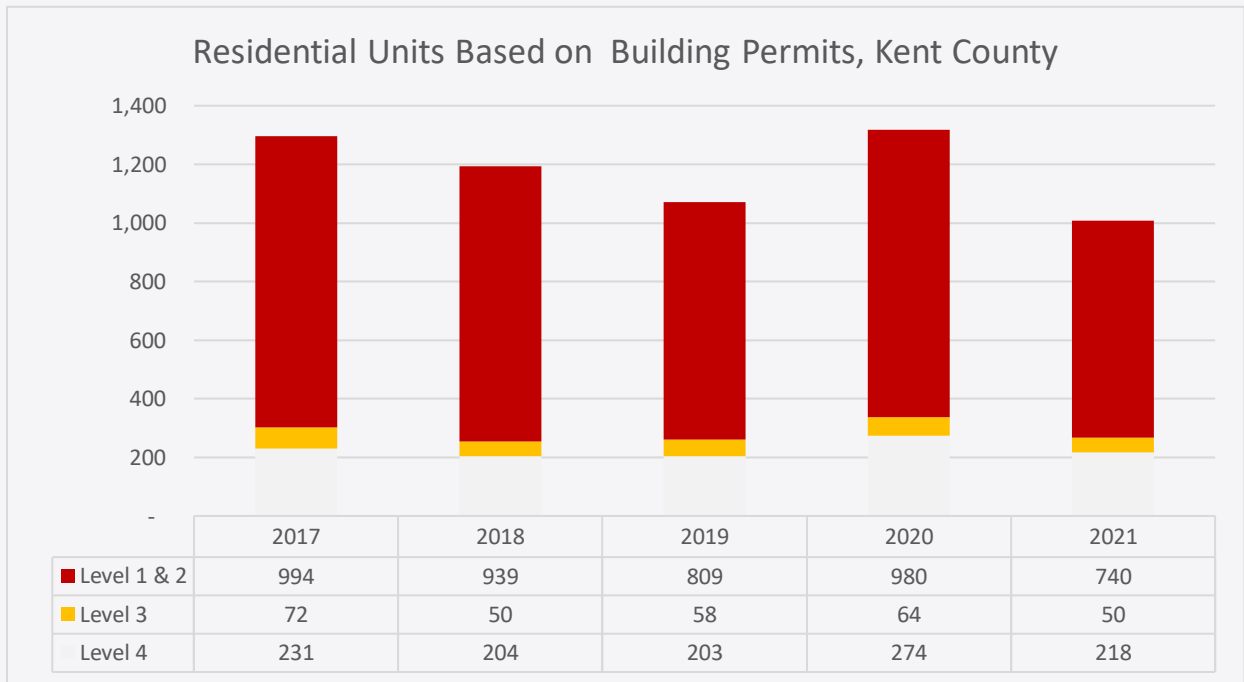
Residential Building Permits, New Castle County



Residential Building Permits, Kent County



Residential Building Permits, Sussex County



Non-residential Trends

Table A.7 Non-residential square footage approved in development applications, by county, 2017–2021

County	2017	2018	2019	2020	2021	Total
New Castle	1,942,087	1,697,884	8,929,158	7,451,273	4,371,990	24,392,392
Kent	899,432	478,635	458,508	1,193,849	580,341	3,610,765
Sussex	182,823	224,955	602,235	1,441,581	660,585	3,112,179
Total	3,024,342	2,401,474	9,989,901	10,086,703	5,612,916	31,115,336

Table A.8 Non-residential square footage approved by building permit, by county, 2017–2021

County	2017	2018	2019	2020	2021	Total
New Castle	2,909,565	1,693,901	2,592,967	7,429,329	2,492,406	17,118,168
Kent	325,072	496,827	398,043	450,018	1,094,134	2,764,094
Sussex	484,132	788,408	792,397	1,038,969	1,103,092	4,206,998
Total	3,718,769	2,979,136	3,783,407	8,918,316	4,689,632	24,089,260

Development Applications

Table A.9 Non-residential square footage approved in development applications, by local jurisdiction, 2017–2021

Jurisdiction	2017	2018	2019	2020	2021	Total
New Castle County*	1,206,238	1,541,788	8,756,643	6,992,309	1,655,862	20,152,840
Elsmere	-	-	3,130	-	2,500	5,630
Middletown	648,293	67,520	86,085	458,964	2,507,472	3,768,334
New Castle	-	-	-	-	99,900	99,900
Newark	-	8,900	83,300	-	101,017	193,217

Wilmington	87,556	79,676	-	-	5,239	172,471
New Castle Total	1,942,087	1,697,884	8,929,158	7,451,273	4,371,990	24,392,392
Kent County*	269,194	271,292	95,009	302,401	21,905	959,801
Cheswold	45,622	-	-	-	-	45,622
Dover	422,078	110,344	363,499	818,912	494,667	2,209,500
Harrington	6,777	2,753	-	-	-	9,530
Hartly	-	-	-	-	-	0
Milford	57,945	82,246	-	42,439	4,000	186,630
Smyrna	97,816	12,000	-	30,097	59,769	199,682
Kent Total	899,432	478,635	458,508	1,193,849		3,030,424
Sussex County*	-	-	-	-	10,900	10,900
Delmar	-	10,000	-	-	-	10,000
Georgetown	121,685	12,085	45,106	31,143	242,306	452,325
Laurel	-	-	3,218	-	-	3,218
Lewes	-	-	313,417	-	95,572	408,989
Milford	1,242	85,000	18,691	8,912	-	113,845
Millsboro	54,294	-	-	14,270	160,000	228,564
Millville	-	59,524	3,700	1,243,456	142,207	1,448,887
Ocean View	-	36,000	14,000	9,982	-	59,982
Seaford	5,602	16,975	198,732	124,218	-	345,527
Selbyville	-	5,371	5,371	9,600	9,600	29,942
Sussex Total	182,823	224,955	602,235	1,441,581	660,585	3,112,179
State Total	3,024,342	2,401,474	9,989,901	10,086,703	5,612,916	31,115,336

*Represents development applications in unincorporated areas of the county

Building Permits

Table A.10 Non-residential square footage approved by building permit, by local jurisdiction, 2017–2021

Jurisdiction	2017	2018	2019	2020	2021	Total
New Castle County*	2,156,092	979,812	2,333,765	6,722,838	1,595,494	13,788,001
Elsmere	-	2,050	-	-	2,500	4,550
Middletown	352,929	116,820	16,151	236,733	434,451	1,157,084
New Castle	-	-	4,600	-	103,400	108,000
Newark	269,826	338,951	167,466	291,031	205,021	1,272,295
Smyrna	-	-	-	69,000	69,000	138,000
Townsend	-	-	-	-	-	0
Wilmington	130,718	256,268	70,985	109,727	82,540	650,238
New Castle Total	2,909,565	1,693,901	2,592,967	7,429,329	2,492,406	17,118,168
Kent County*	36,427	19,298	223,998	220,485	237,083	737,291
Bowers Beach	-	-	-	-	-	0
Camden	20,371	-	17,974	18,100	15,468	71,913
Cheswold	22,000	13,200	-	-	-	35200
Clayton	-	6,160	-	-	-	6160
Dover	152,027	386,751	48,182	99,509	789,098	1,475,567
Felton	2,400	1,800	-	2,400	-	6600
Harrington	6,777	2,753	-	-	-	9530
Hartly	-	-	-	-	-	0
Houston	-	-	-	-	-	0
Kenton	-	-	9,113	-	-	9113
Magnolia	-	3,600	-	-	-	3600
Milford	36,470	8,471	41,860	72,708	25,030	184,539

Smyrna	24,600	52,594	56,916	36,816	27,455	198,381
Woodside	24,000	2,200	-	-	-	26200
Kent Total	325,072	496,827	398,043	450,018	1,094,134	2,764,094
Sussex County*	262,378	463,404	526,569	893,999	6,97,421	2146350
Bethany Beach	8,800	-	-	-	-	8800
Bridgeville	-	-	-	-	5,000	5,000
Dagsboro	-	-	5,376	6,000	-	11376
Delmar	2,280	-	-	-	-	2280
Dewey Beach	2,200	-	8,444	-	1,999	12,643
Fenwick Island	-	-	45,125	-	-	45125
Frankford	3,226	9,840	-	1,272	-	14338
Georgetown	108,757	79,948	30,517	36,416	98,763	354,401
Laurel	-	-	3,218	-	-	3218
Lewes	3,000	-	-	-	223,431	226,431
Milford	-	-	-	32,781	4,000	36,781
Millsboro	55,120	56,471	62,717	14,270	7,129	195,707
Millville	1,692	45,684	14,879	-	11,589	73,844
Milton	-	-	-	-	-	0
Ocean View	13,920	-	14,000	24,037	5,200	57,157
Rehoboth Beach	9,597	100,048	10,000	-	-	119645
Seaford	8,898	16,013	49,629	30,194	45,310	150,044
Selbyville	4,264	17,000	21,923	-	3,250	46,437
Sussex Total	484,132	788,408	792,397	1,038,969	1,103,092	4,206,998
State Total	3,718,769	2,979,136	3,783,407	8,918,316	4,689,632	24,089,260

*Represents development applications in unincorporated areas of the county

Relationship to State Strategies

In relation to the *State Strategies*, the vast majority of square footage approved by development applications statewide over the five-year period has occurred in Level 1 & 2 areas. About twice as much development has occurred over this time in Level 4 areas than Level 3 areas, primarily in New Castle County. The year 2020 was the first during the reporting period where Sussex County has had any development approved for Level 3 or 4 areas, and as stated previously the amount of development approved in 2019 and 2020 grew a great deal across all three counties but especially in New Castle County.

Table A.11 Non-residential square footage based on development applications, by county and statewide, by *State Strategies* investment level, 2017-2021

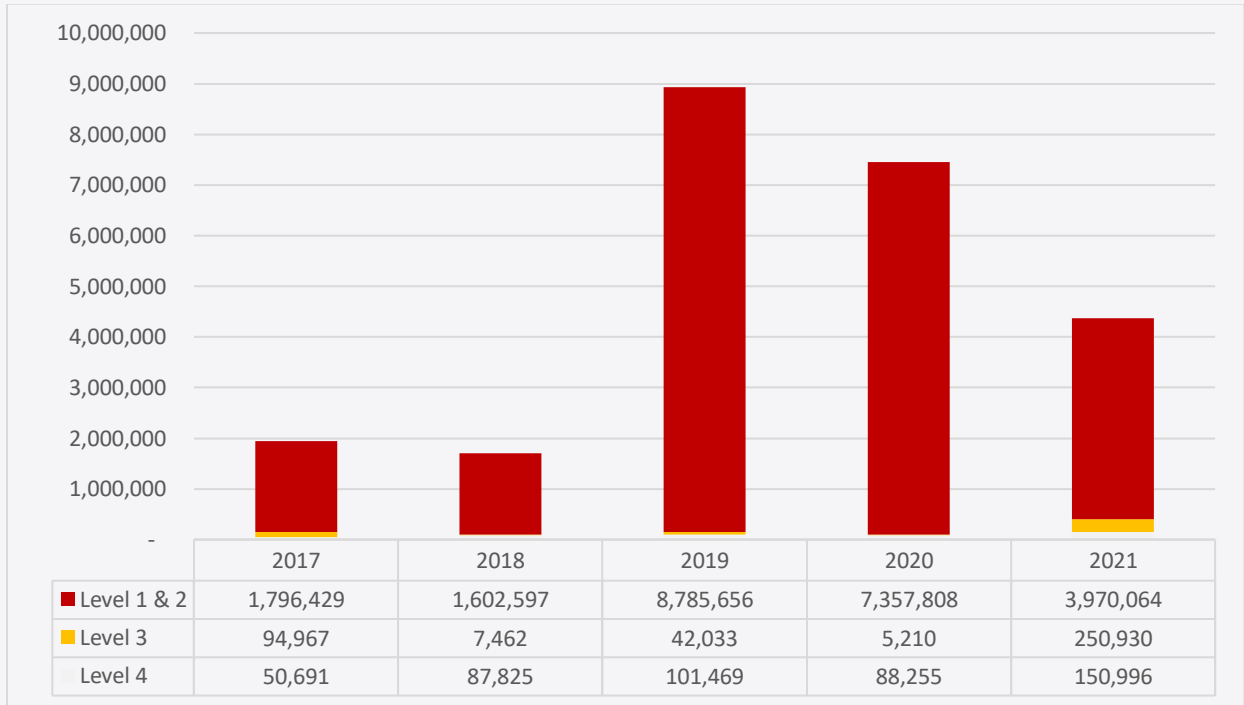
County	2017	2018	2019	2020	2021	Total
New Castle	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Total Sq. Ft.
Level 1 & 2	1,796,429	1,602,597	8,785,656	7,357,808	3,970,064	23,512,554
Level 3	94,967	7,462	42,033	5,210	250,930	400,602
Level 4	50,691	87,825	101,469	88,255	150,996	479,236
New Castle Total	1,942,087	1,697,884	8,929,158	7,451,273	4,371,990	24,392,392
Kent						0
Level 1 & 2	823,143	434,574	422,763	1,155,461	571,276	3,407,217
Level 3	-	-	8,460	-	-	8460
Level 4	76,289	44,061	27,285	38,388	9,065	195,088
Kent Total	899,432	478,635	458,508	1,193,849	580,341	3,610,765
Sussex						0
Level 1 & 2	182,823	224,955	602,235	1,108,152	638,505	2,756,670
Level 3	-	-	-	290,429	16,520	306,949
Level 4	-	-	-	43,000	5,560	48,560
Sussex Total	182,823	224,955	602,235	1,441,581	5,612,916	8,064,510
Delaware						0
Level 1 & 2	2,802,395	2,262,126	9,810,654	9,621,421	5,179,845	29,676,441
Level 3	94,967	7,462	50,493	295,639	267,450	716,011
Level 4	126,980	131,886	128,754	169,643	165,621	722,884
State Total	3,024,342	2,401,474	9,989,901	10,086,703	5,612,916	31,115,336

Table A.12 Non-residential square footage based on building permits, by county and statewide, by *State Strategies* investment level, 2017–2021

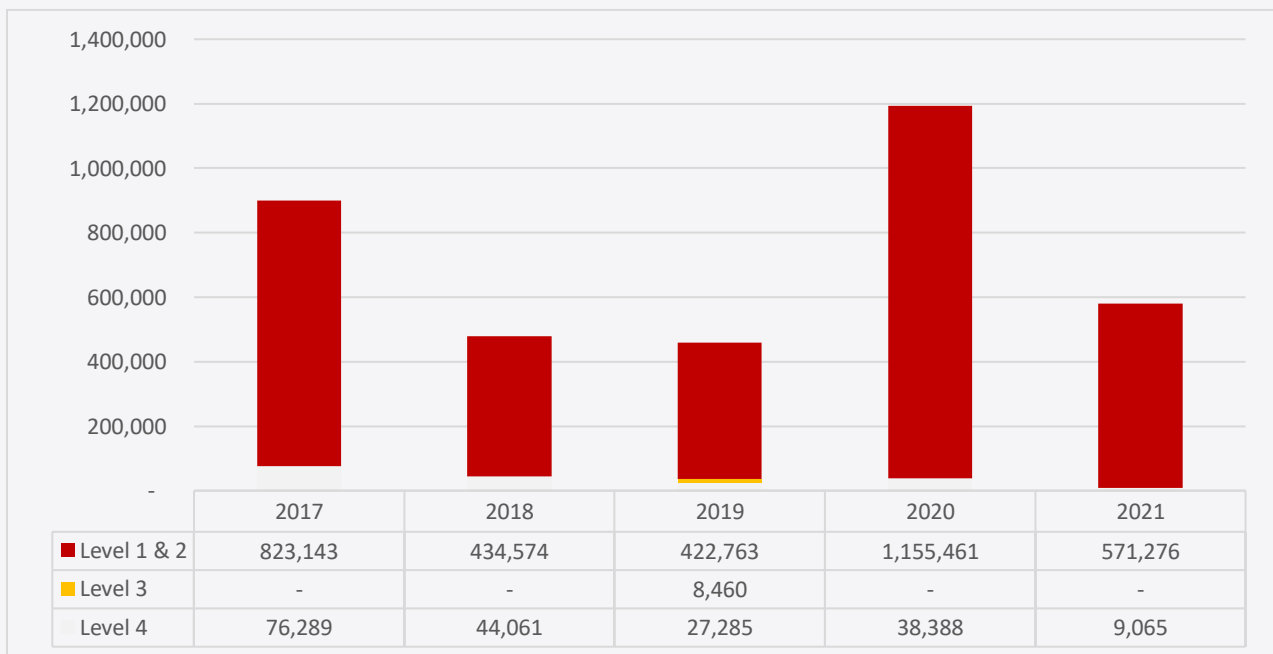
County	2017	2018	2019	2020	2021	Total
New Castle	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Total Sq. Ft.
Level 1 & 2	2,875,289	1,496,322	2,513,304	6,069,001	2,187,043	15,140,959
Level 3	-	115,051	33,557	1,338,383	253,724	1,740,715
Level 4	34,276	82,528	46,106	21,945	51,639	236,494
New Castle Total	2,909,565	1,693,901	2,592,967	7,429,329	2,492,406	17,118,168
Kent						0
Level 1 & 2	292,395	481,409	295,903	414,179	1,089,634	2,573,520
Level 3	7,837	-	8,460	-	-	16297
Level 4	24,840	15,418	93,680	35,839	4,500	174,277
Kent Total	325,072	496,827	398,043	450,018	1,094,134	2,764,094
Sussex						
Level 1 & 2	301,806	556,118	635,488	568,728	772,229	2,834,369
Level 3	120,936	146,000	90,587	197,997	132,024	687,544
Level 4	61,390	86,290	66,322	272,244	198,839	685,085
Sussex Total	484,132	788,408	792,397	1,038,969	1,103,092	4,206,998
Delaware						
Level 1 & 2	3,469,490	2,533,849	3,444,695	7,051,908	4,048,906	20,548,848
Level 3	128,773	261,051	132,604	1,536,380	385,748	2,444,556
Level 4	120,506	184,236	206,108	330,028	254,978	1,095,856
State Total	3,718,769	2,979,136	3,783,407	8,918,316	4,689,632	24,089,260

Figure A.5 Non-residential square footage in development applications and building permits, by county and State Strategy level, 2017–2021

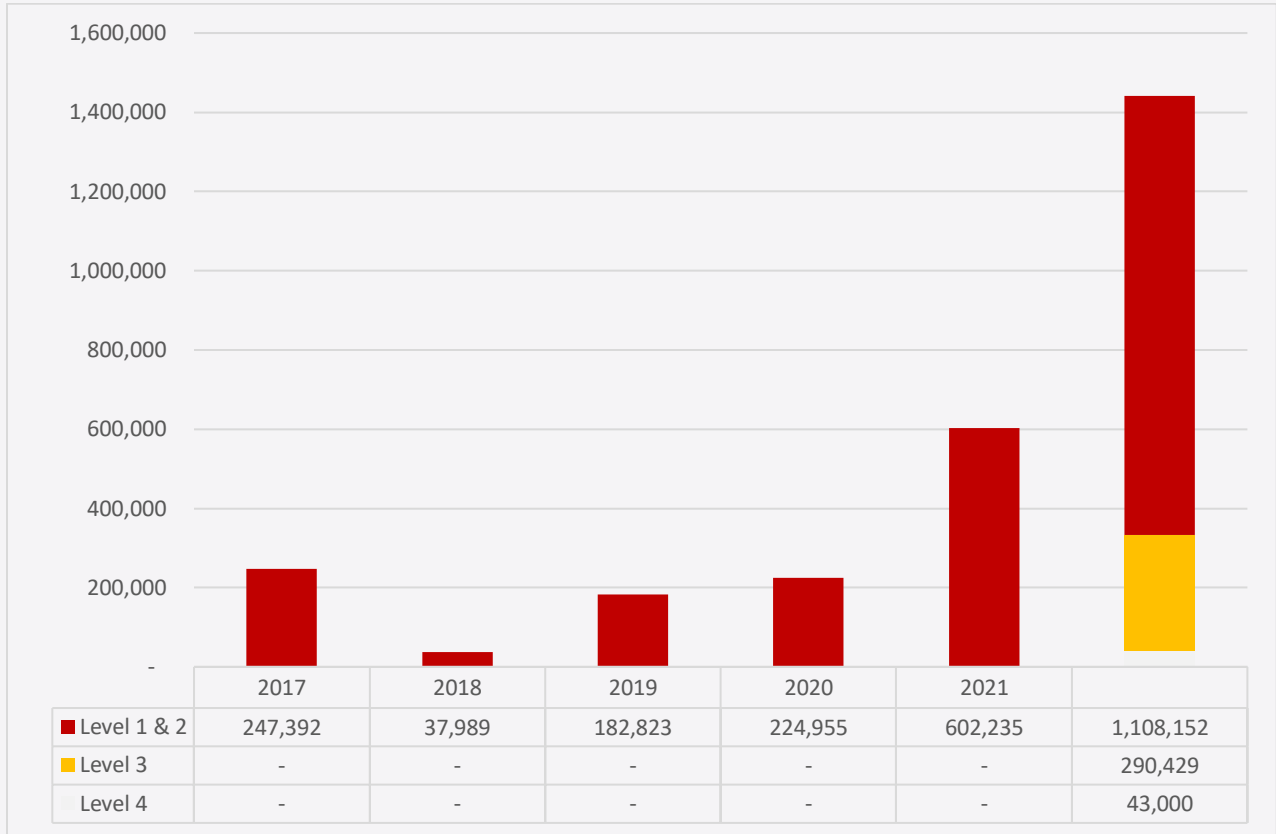
Non-residential square footage in development applications, New Castle County



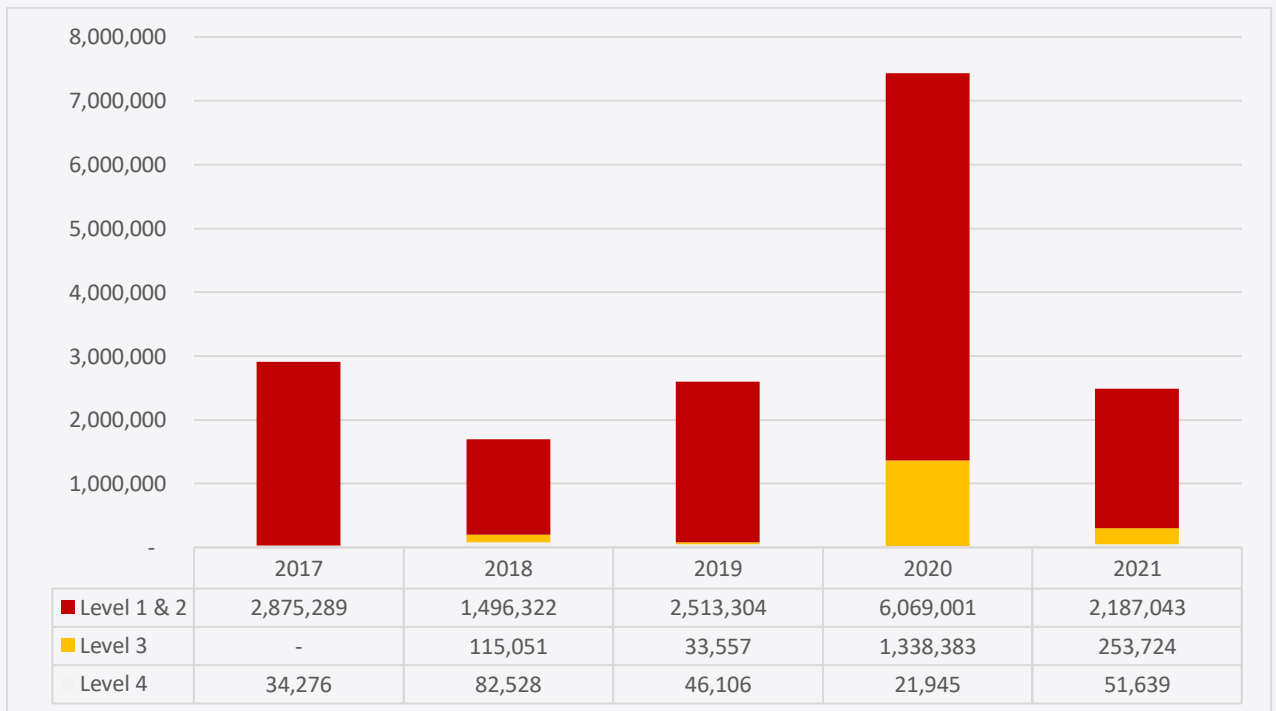
Non-residential square footage in development applications, Kent County



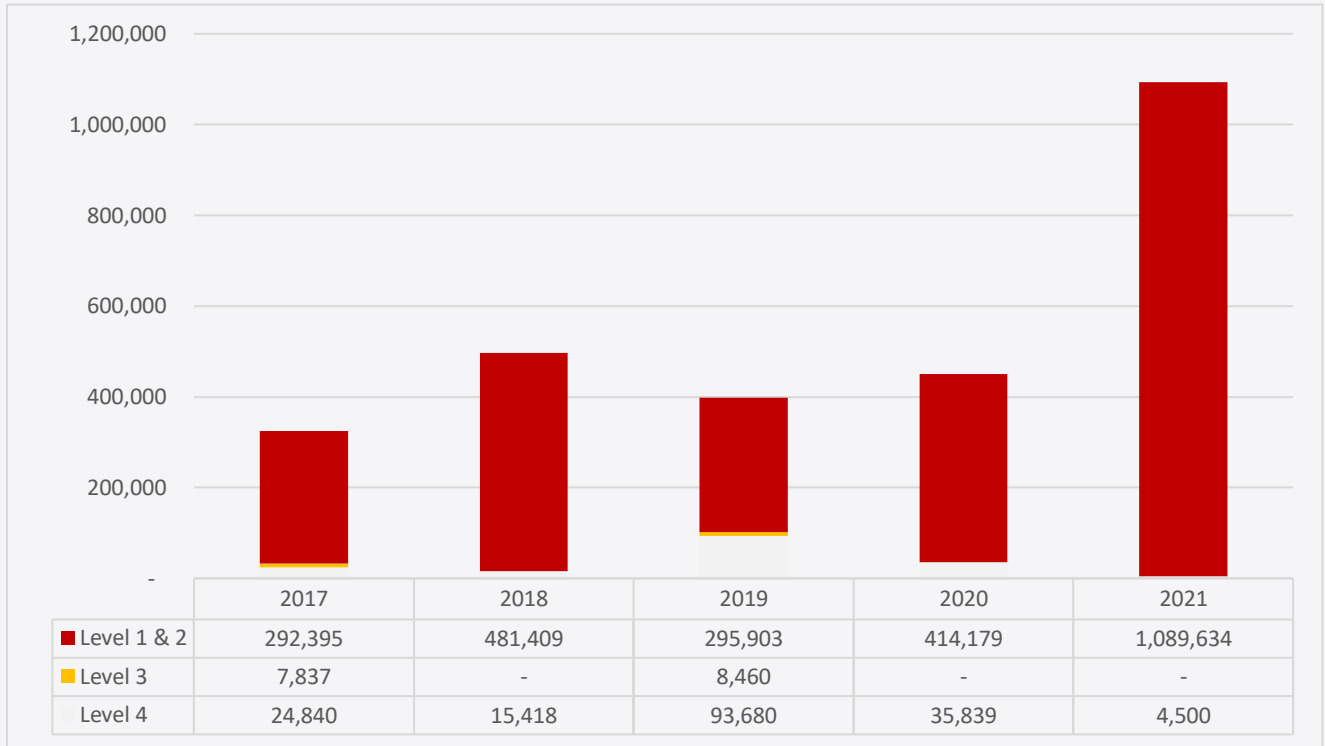
Non-residential square footage in development applications, Sussex County



Non-residential square footage in building permits, New Castle County



Non-residential square footage in building permits, Kent County



Non-residential square footage in building permits, Sussex County

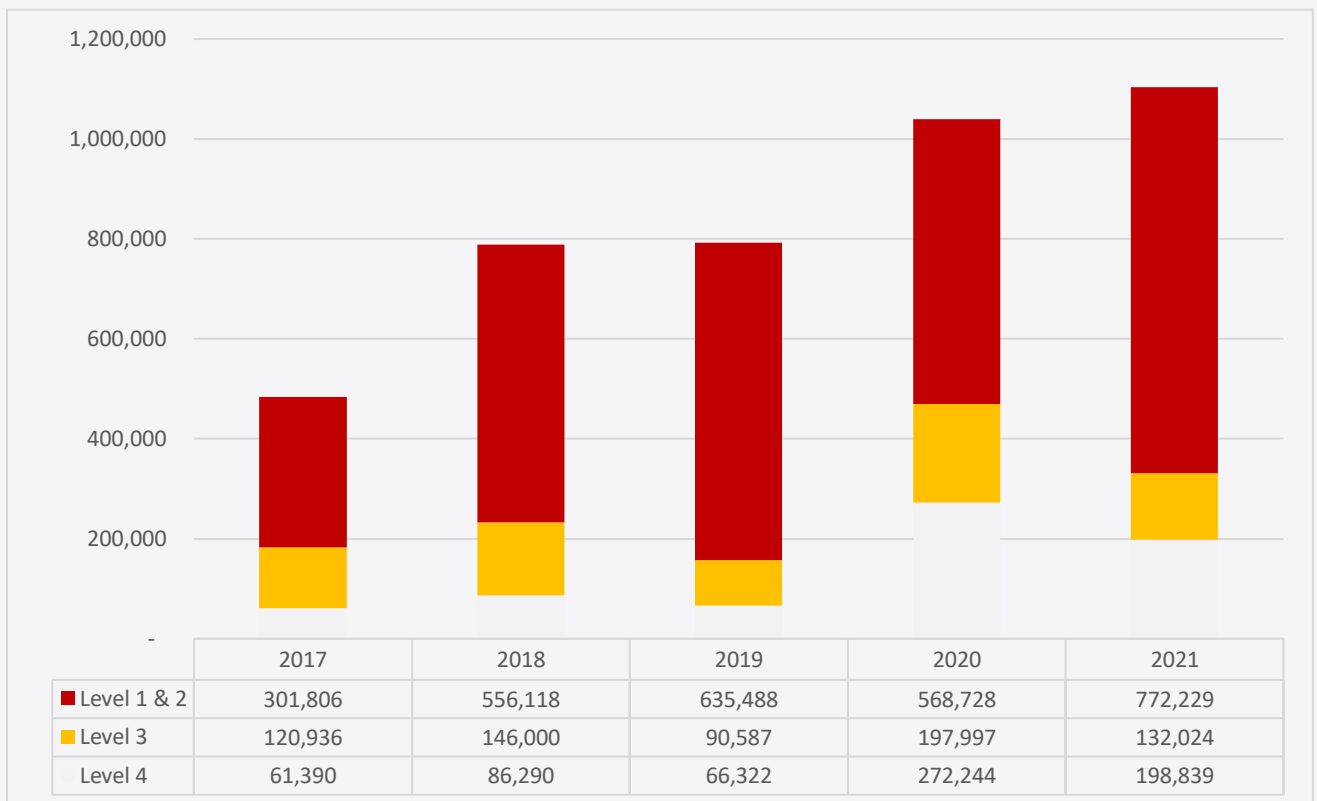
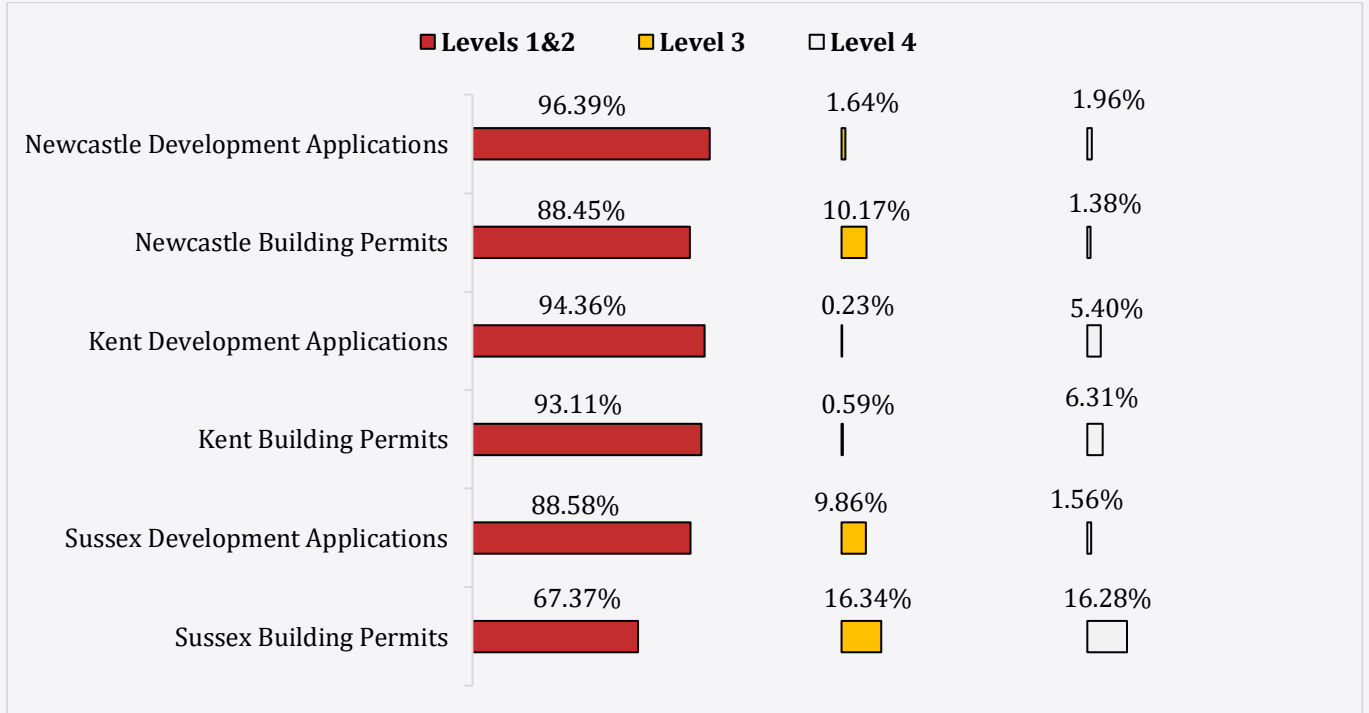


Figure A.6 Non-residential development, proportion by State Strategies level, by county, 2017–2021



Trends Summary

Table A.13 Summary of residential development activity by county and investment level, 2017–2021

County	Levels 1 & 2	Level 3	Level 4	% In Level 1, 2 & 3	% Outside Levels 1, 2 & 3
Residential Units in Development Applications (2017-2021)					
New Castle County	9,012	679	380	96%	4%
Kent County	2,632	258	35	99%	1%
Sussex County	5,982	4,800	4,104	72%	28%
Residential Building Permits (2017-2021)					
New Castle County	8,523	608	328	97%	3%
Kent County	4,462	294	1,130	81%	19%
Sussex County	11,006	5,193	5,631	74%	26%

County	Levels 1 & 2	Level 3	Level 4	% In Level 1,2 & 3	% Outside Levels 1,2 &3
Non-Residential Square Footage in Development Applications (2017-2021)					
New Castle County	23,512,554	400,602	479,236	98%	2%
Kent County	3,407,217	8,460	195,088	95%	5%
Sussex County	2,756,670	306,949	48,560	98%	2%
Non-Residential Square Footage in Building Permits (2017-2021)					
New Castle County	15,140,959	1,740,715	236,494	99%	1%
Kent County	2,573,520	16,297	174,277	94%	6%
Sussex County	2,834,369	687,544	685,085	84%	16%

Table A.14 Summary of non-residential development activity by county and investment level, 2017–2021

Overview of Methodology

The OSPC and IPA conducted a spatial analysis to examine the location and extent of recently approved development across Delaware. Spatial analysis was performed using the ArcMap GIS software package produced by Esri. The best available spatial datasets were identified and used to perform the analysis and compare development activity relative to the 2020 *Strategies for State Policies and Spending* investment levels.

The OSPC obtain development application and building permit data from Delaware’s municipalities and counties for each year from 2008 onward. These data form the basis for the spatial analysis. For each building permit or development application, the data included parcel identification, the number of residential units, and/or amount of non-residential square-footage associated with the permit or application. In some cases, street address or other locational information (e.g., subdivision name, crossroads, etc.) pertaining to the permit or application were included. All development data were structured and compiled into a single, consistent dataset in Esri Geodatabase format.

The results of this analysis should be used to determine general trends in development activity across the state. The magnitude and direction of trends can be determined in this way, but precise levels of development should not be inferred from the analysis.