

mixed-use zones as a significant zoning category and the increase in land zoned for commercial and industrial use from 1.1 percent to 3.9 percent. (It is important to note that although the actual number of acres of land zoned for commercial, industrial and multi-family use is still very small compared to other categories, the yields per acre of jobs and housing units in these zones is comparatively high.)

**Percentage Distribution
of Montgomery County's Zoned Land
by Zoning Category
1960 - 1991**

Zone	1960	1991
Commercial	0.4%	1.1%
Industrial	0.9%	2.8%
Mixed Use	N.A.	1.4%
Multi-Family	0.4%	1.7%
Single-Family	98.3%	51.2%
Rural	N.A.	40.8%
Other	N.A.	0.9%
Total	100.0%	100.0%

Note: Total is less than the County's total acreage because most water areas and many rights-of-way are not zoned.

Source: Montgomery County Planning Department, Maryland State Tax Assessor's Parcel File, and ...On Wedges and Corridors, 1964, February 1992

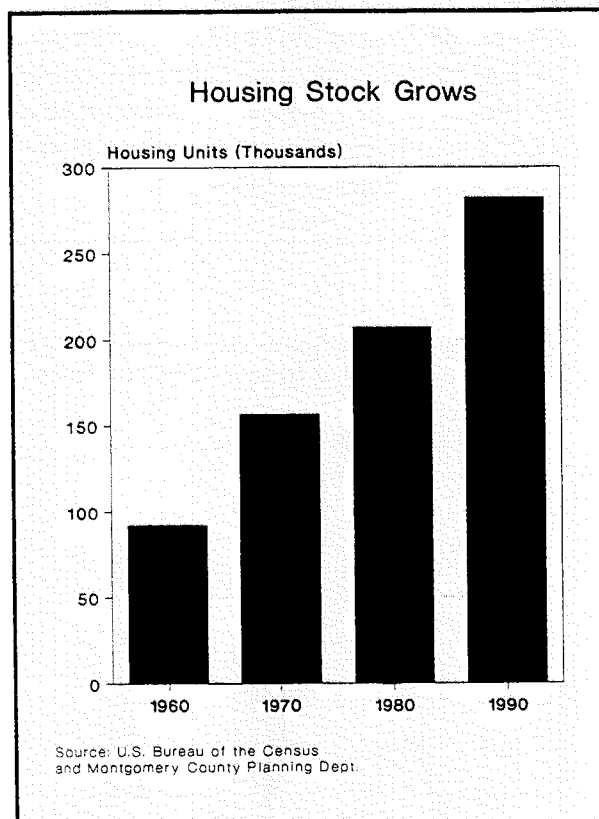
II. RESIDENTIAL LAND USE

Montgomery County's housing stock has grown substantially in quantity and variety since the 1969 General Plan was adopted.

A. Quantity

* The number of housing units in the County grew by 83 percent between 1970 and 1990, from 161,000 to 296,000. The larger increase occurred in the 1980s when the number of housing units increased by 37 percent, or 79,500 units. The amount of growth in the 1970s was 34 percent, or 55,000 units.

* Montgomery County's 83 percent growth exceeded the region's rate of 56 percent. The County's growth rate was less than that of Fairfax County, where the housing stock increased by more than 127 percent, from 141,000 units to 320,000 units, but more than Prince George's County, where the housing supply increased by only 35 percent, from 200,000 units to 270,000. (The data includes the cities in each county.)

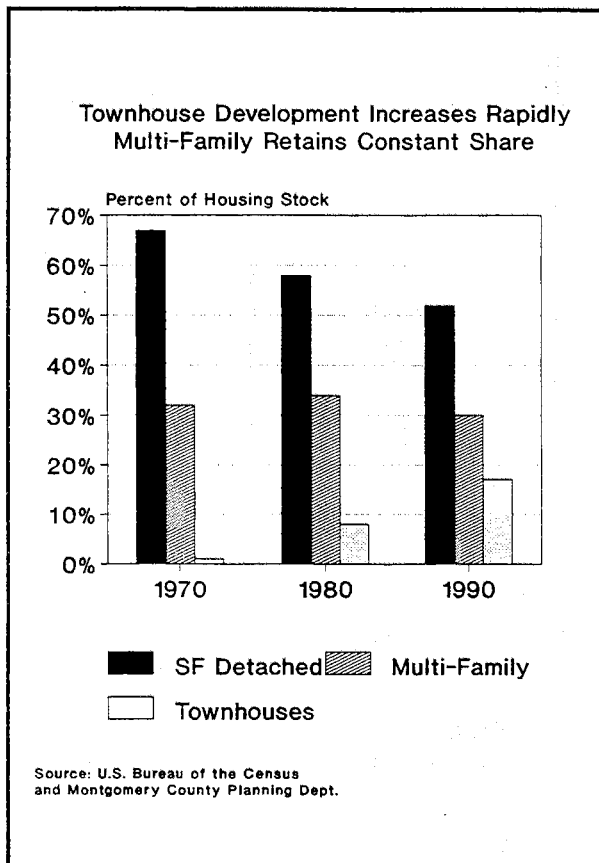


B. Housing Types

* Between 1970 and 1990, the composition of Montgomery County's housing stock changed significantly. Single-family detached houses declined from a 68 percent share to a 52 percent share, while townhouses emerged as a major housing type. In fact, townhouses increased from about 1 percent of the housing stock, or 2,400 units, in 1970 to a significant 17 percent or 50,500 units, by 1990. Townhouse completions were 39 percent of all residential completions from 1981 through 1990, reaching a high of 53 percent in both 1982 and 1983. The percentage

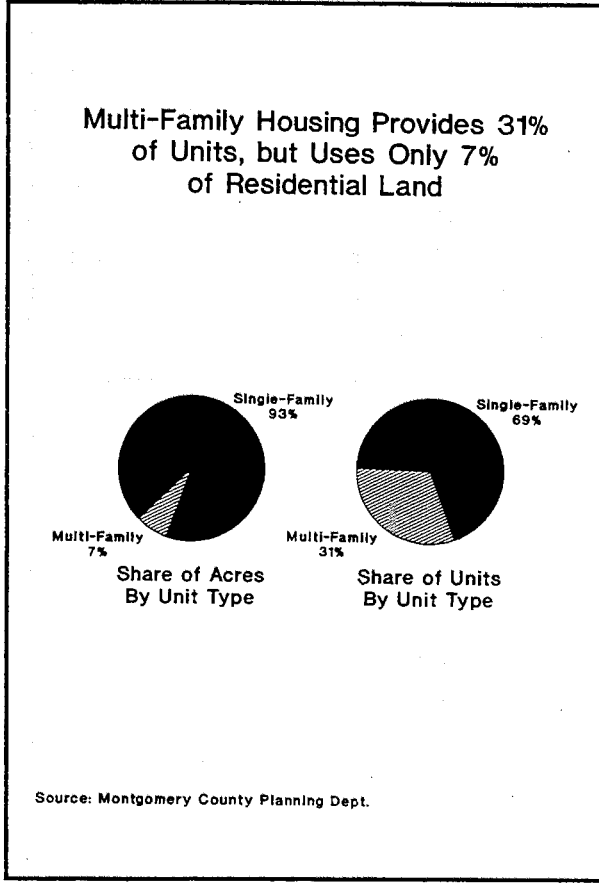
of townhouses completed relative to the percentage of single-family detached houses has been declining since 1986, however.

* Multi-family housing retained a comparatively constant share of the housing supply, declining slightly from 31 percent in 1970 to 30 percent in 1990. The most dramatic growth in the number of apartments took place in the preceding decade, the 1960s, when new construction boosted the total by 33,000 units, from 18 percent to 31 percent of all housing units. Multi-family housing occupies 7 percent of residential land in 1991 (2 percent overall), while accommodating 31 percent of all housing units in 1992.



C. Large Lot Residential Wedge

* Area master plans and functional plans since 1969 have further defined the wedge. All master plans since 1969 have considered areas zoned for lots of one and two acres as the residential wedge. In 1981, the Agricultural Reserve was



created by the adoption of the *Functional Master Plan for the Preservation of Agriculture & Rural Open Space*. These actions have articulated these two types of wedge areas. This section describes the residential wedge while the agricultural wedge is discussed in Section V.

* The residential wedge is now characterized by single-family, detached houses on lots of one and two acres. Houses on large lots existed before the adoption of the General Plan, of course, but the location, zoning and quantity of such housing has become more clearly defined in the intervening period.

* In 1991, nearly 57,000 acres of land were zoned for lots of 1 and 2 acres, representing almost 20 percent of the County's land area. More than 40 percent of this area is tax exempt, however, usually meaning that it is in public or non-profit use such as golf courses or parks. Of the remainder, about 27,000 acres are vacant or redevelopable, and more than 13,000 housing units

are currently located in these zones. About 25 percent of the residential wedge is within the sewer envelope. (This land is classified as residential in the table of zoned land by zoning category.)

D. Future Residential Growth

1. Development Capacity

* The total capacity of residentially zoned and planned land ranges from 440,000 to 480,000 housing units. In general, the low figure represents the capacity of the land if it were developed at its current base zoning density. The high presumes extensive use of floating zones such as planned development and other higher density zoning options.

* If growth were to continue at the 1980s pace, Montgomery County would near the build-out of its zoned capacity for housing within 20 years. As the household forecast section shows, the pace is expected to be slower in the next decades.

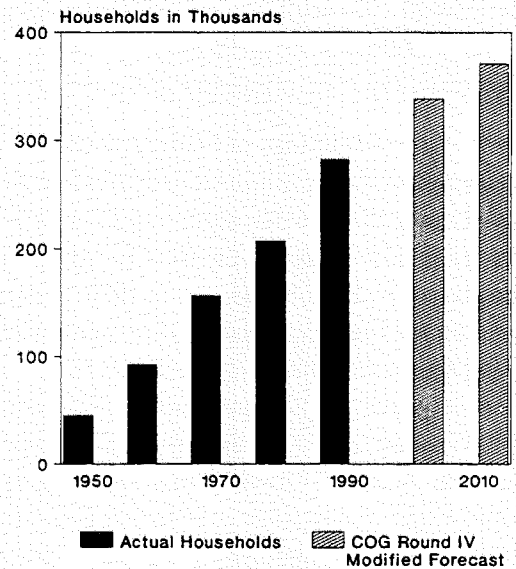
* Of the total zoned capacity, between 146,000 and 183,000 units remain to be built. About 296,000 housing units already exist. In September 1991, the pipeline of approved development contained 33,200 units, 23 percent of the total low remaining zoning capacity.

* Eight percent of the total residential development capacity is located in the County's ten current Metrorail station sector plan areas. This percentage would increase if planned transit-oriented development in the I-270 corridor, such as that in Germantown and the Shady Grove Study Area, were included. (The increase in the percentage of capacity associated with planned transit-oriented development will be available at the Planning Board worksession.)

2. Household Forecast

* Household growth is expected to continue, but at a slower pace between 1990 and 2000 than Montgomery County experienced in the 1980s. The Planning Department's Round IV

Montgomery County Experiences
Steady Long-Term Growth in Households



Source: Montgomery County Planning Dept. and U.S. Bureau of the Census

Modified Intermediate Forecast predicts that the County will see the construction of 56,000 new housing units by 2000 compared to 70,000 in the previous decade. The forecast expects the total number of households to reach 371,000 by 2010. (Planning Department forecasts are consistent with Council of Governments' forecasts and are expressed in terms of households rather than housing units. The number of housing units tends to be slightly higher than the number of households).

III. EMPLOYMENT LAND USE

The amount of land used for employment has grown more rapidly than expected by the 1969 General Plan. Employment land use has also been more intensive than envisioned and oriented toward office and service uses rather than the anticipated industrial and manufacturing uses.