

EXECUTIVE SUMMARY



Population and Survey Analysts (PASA) has recently completed a Demographic Update for the City of Fulshear, and the findings are summarized below. The Demographic Update included the study of the current population, potential growth based on new housing, and trends occurring in the population throughout the northwest Fort Bend County region. PASA projects population by using forward-looking techniques and does not rely on past rates of change.

OCTOBER 2018 POPULATION ESTIMATE

After evaluating the current population of the City and the City’s Extra-territorial Jurisdiction (ETJ), recent trends in population, projected additional housing occupancies and their resulting household size, and the over-arching economic and employment concerns, PASA has estimated the population inside the City Limits to be 12,025. This represents a population increase of 1,741 (16.9%) from October 2017 to October 2018.

City	12,025
ETJ	16,009
City + ETJ	28,034

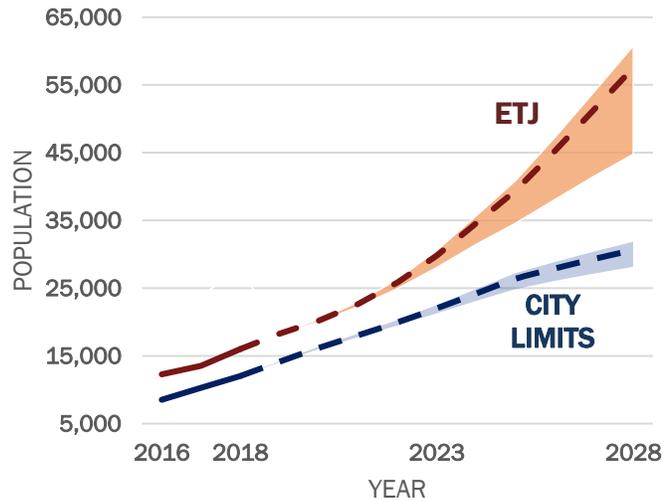
ANNUAL POPULATION PROJECTIONS

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
City											
Population	12,025	14,141	16,187	18,040	19,953	22,022	24,192	26,372	27,893	29,306	30,622
Change		2,116	2,046	1,853	1,913	2,069	2,170	2,180	1,521	1,413	1,316
Growth		18%	14%	11%	11%	10%	10%	9%	6%	5%	4%
ETJ											
Population	16,009	18,271	20,184	22,652	25,852	29,811	34,579	39,365	45,191	51,367	57,520
Change		2,262	1,913	2,468	3,200	3,959	4,768	4,786	5,826	6,176	6,153
Growth		14%	10%	12%	14%	15%	16%	14%	15%	14%	12%
City + ETJ		32,412	36,371	40,692	45,805	51,833	58,771	65,737	73,084	80,673	88,142

Without annexation, growth in the City Limits is expected to decrease from 1,900–2,200 annually to 1,316 in 2028. The annual population change within the ETJ is projected to grow larger throughout the ten-year projection period. By October 2019, an additional 2,262 people are projected to live in the Fulshear ETJ. By 2023, the population of the ETJ is projected to substantially increase, expanding by 4,000 annually until 2025 and then by 6,176 in 2027.

GROWTH SCENARIOS

PASA takes a “conservative” approach to projecting growth, and develops a Low, Moderate, and High scenario of growth for each of the years in the projection period. These scenarios are shown on a graph to the right. The moderate growth scenarios are illustrated with hashed trend lines. In blue, the population in the City Limits is projected to grow to over 30,000 by 2028. The population of the ETJ is projected to increase to just under 60,000 in the same period. The shaded portions of the chart indicate the low- and high-growth scenarios for each jurisdiction.



PROJECTIONS BY COMMUNITY

PASA has generated population projections by Planning Unit, neighborhood-level geographies, to aid in long range planning and has then aggregated the data into the boundaries of both master-planned communities and City regions. Population projections of selected communities are included in the following chart:

Community	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
CITY LIMITS											
Cross Creek Ranch	10,242	12,004	13,631	15,005	16,320	17,576	18,868	20,168	20,812	21,317	21,695
Downtown Area (A03, B02)	316	363	327	346	399	491	586	681	807	957	1,120
Fulbrook on Fulshear Creek	1,023	1,245	1,457	1,682	1,920	2,187	2,469	2,753	3,035	3,317	3,601
Fulshear Run	106	177	262	348	439	611	767	923	964	993	1,025
Polo Ranch	0	34	158	307	518	751	984	1,217	1,466	1,715	1,964
ETJ											
Churchill Farms	1,863	1,959	1,979	1,999	2,019	2,039	2,059	2,080	2,101	2,122	2,143
Firethorne	9,205	9,757	9,954	10,286	10,762	11,241	11,595	11,957	12,118	12,289	12,469
Foster Farms	0	0	3	3	3	37	194	351	772	1,275	1,832
Fulbrook	669	730	759	788	814	839	864	889	914	937	960
Fulshear Farms	0	0	0	201	469	998	1,756	2,514	3,508	4,597	5,768
Fulshear Lakes	0	0	58	235	557	984	1,503	2,022	2,752	3,524	4,330
Harrison Interests Tract	0	0	0	0	27	211	584	957	1,738	2,675	3,691
Jordan Ranch	667	1,148	1,810	2,555	3,428	4,458	5,542	6,631	7,573	8,505	9,220
Tamarron	3,089	3,997	4,632	5,309	5,991	6,789	7,692	8,599	9,530	10,456	11,377

PROJECTIONS BY AGE GROUP

City of Fulshear

Age Group	2018		2023	
	*Estimate	%	**Projection	%
Under 5 Years	1,106	9.2%	2,195	10.0%
5 to 17 Years	3,066	25.5%	5,503	25.0%
18 to 24 Years	474	6.7%	1,204	5.5%
25 to 34 Years	1,190	9.9%	1,608	7.3%
35 to 54 Years	4,064	33.8%	6,722	30.5%
55 to 74 Years	1,599	13.3%	3,982	18.1%
75 Years and Over	192	1.6%	808	3.7%
All Age Groups	12,025		22,022	

Source: U.S. Census

*Estimate is based on the Five-Year, 2017 American Community Survey

**PASA projection

PROJECTED NEW HOUSING UNITS

PASA has projected new housing occupancies for the next ten years. These projections are based on interviews with land owners, real estate experts, commercial brokers, and City and County officials. These projections are for the number of new housing units only and are not a reflection of the total population expected in each development.

	Projected New Housing Occupancies				
	Single-Family	Multi-Family	Mixed Use	Age-Restricted	Total
Jan 2019–Oct 2019	878	80	0	83	1,041
Oct 2019–Oct 2020	1,083	180	0	83	1,346
Oct 2020–Oct 2021	1,270	155	25	75	1,525
Oct 2021–Oct 2022	1,611	140	30	75	1,856
Oct 2022–Oct 2023	1,933	240	85	75	2,333
Oct 2023–Oct 2024	2,273	235	145	75	2,728
Oct 2024–Oct 2025	2,367	320	175	75	2,937
Oct 2025–Oct 2026	2,433	335	195	75	3,038
Oct 2026–Oct 2027	2,501	375	215	75	3,166
Oct 2027–Oct 2028	2,449	400	215	29	3,093
Jan 2019–Oct 2023	6,775	795	140	391	8,101
Oct 2023–Oct 2028	12,023	1,665	945	329	14,962
Jan 2019–Oct 2028	18,798	2,460	1,085	720	23,063

PROPORTION OF HOUSING UNITS BY HOUSING TYPE

Housing Type	2018		2023 Projected		2028 Projected	
Single-Family/Condo/Mixed Use	9,048	98.6%	14,856	91.9%	26,934	89.1%
Age-Restricted SF	128	1.4%	519	3.2%	848	2.8%
Multi-Family	0	0.0%	795	4.9%	2,460	8.1%
Total Housing Units	9,176		16,170		30,242	

*Housing Units in the City Limits and ETJ

HOUSEHOLD SIZE AND HOUSING TYPES

The average household size of neighborhoods in the Study Area can vary dramatically. Neighborhood attributes such as lot sizes, amenities, and lifestyle options impact the number of people residing in individual homes. Conventional suburban residential communities generally have a larger median household size, particularly as the neighborhood ages and a “peak” population develops. Traditional suburban single-family neighborhoods in northern Fort Bend County have a median household size of 3.15 to 3.50. In comparison, estate communities such as Fulbrook and nearby Weston Lakes have a median household size of approximately 2.65 to 2.85 according to the U.S. Census. Exurban communities on the fringes of the Metro Area are often marketed to older, smaller households. These exurban neighborhoods feature larger lots that appeal to retirees.

Housing Type	Typical Household Size
Multi-Family, majority 1-bedroom	1.55-1.85
Multi-Family, majority 2+ bedroom	1.85-2.25
Single-Family, Family Oriented	3.15-3.30 initially; 3.30-3.50 at peak
Single-Family, Age-Restricted 55+	1.65-1.80
Single-Family, Acreage/Rural Estate	2.65-2.85

PASA has estimated household size for each current and future neighborhood by using various data sources to create useful population estimates and projections by Planning Unit. In order to determine household size estimates, census-estimated household sizes by Census Block Group and Census Tract were analyzed as well as Lamar CISD and Katy ISD enrollment counts by neighborhood. Housing styles, apartment bedroom counts, and covenants that restrict youth from living in homes were also considered along with other demographic characteristics of developing neighborhoods. **The weighted mean household size in the Study Area was determined to be 3.15.**

Multi-family developments in the western suburbs tend to have a median household size of 1.55 to 2.25 depending on the proportion of one-bedroom apartments to total number of units within each individual property.

PROPORTION OF POPULATION BY HOUSING TYPE

Housing Type	2018		2023 Projected		2028 Projected	
Single-Family	27,810	99.20%	49,736	96.0%	81,875	92.9%
Age-Restricted SF	224	0.80%	908	1.8%	1,484	1.7%
Multi-Family	0	0.00%	1,189	2.3%	4,783	5.4%
Population	28,034		51,833		88,142	

*Housing Units in the City and ETJ

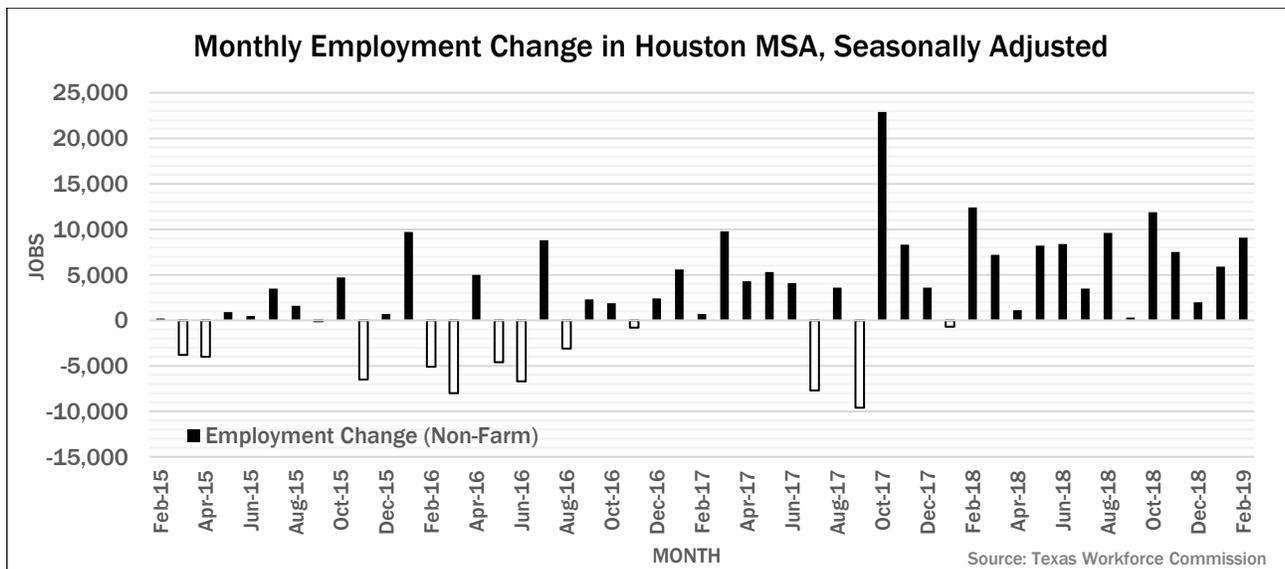
HOUSING OCCUPANCY STATUS

PASA considers vacant housing when creating population projections for such a large study area. The U.S. Census estimates that 6.3% of the existing housing stock in the City of Fulshear is vacant per the 2017 American Community Survey. In the two Census Tracts covering the Study Area, the Survey estimates the vacancy rate to be 5.8%, cumulatively. PASA has assumed a 4% vacancy rate for the Study Area since much of the Area is outside the City of

Fulshear but inside the county. Also, PASA does not consider new homes available for purchase to be occupied. New housing communities are surveyed by PASA staff and only occupied homes are counted. Unoccupied, new homes are included in the housing projections for each individual community. As neighborhoods age, PASA assumes vacancies will gradually increase closer to 5% as homes are placed on the market and resold. The housing counts available in this report, however, include totals for all homes completed. These housing counts and projected housing counts include all occupied and vacant homes for completeness so planners can determine the projected number of utility connections annually.

ECONOMIC GROWTH

The availability of large tracts of raw land, affordable housing, and high-quality schools will pull many of Houston Metro’s new residents and homebuyers toward Fulshear over the next few decades. PASA’s low and high growth scenarios should be considered if any turbulence in the local or national economy were to occur. As was evident during the Financial Recession of the late-2000s, suburban communities can be dramatically affected by an economic slowdown. In the north Dallas suburbs for example, the fast-growing City of Frisco saw housing permits drop 77% in a three-year period from 2006 to 2009.



The Greater Houston Partnership released a positive employment forecast for 2019. The forecast suggests that all sectors of the economy will see continued growth, with health care, construction and administrative performing the strongest. Overall, 71,000 new jobs are projected to be created across the Houston Metro Area—the majority of which, 12.6%, will be in healthcare, a leading sector in Metro Houston’s economy. This projected increase in employment mirrors the 12-month period ending February 2019. During this period, 74,700 jobs were added in the Metro Area. Both state and local employment is strong. The Texas unemployment rate was 3.8% in February 2019. Also in February 2019, Fort Bend County’s unemployment was 3.9%.

ENERGY SECTOR OUTLOOK

In August 2018, the United States became the world's largest oil producer. The Permian Basin in West Texas is the leading production region in the country and continues to grow. The State's booming oil and gas industry continues to react to volatile markets, technological advancements, and infrastructure improvements. After high third quarter profit announcements by many energy companies, the commodity's price drop in the fourth quarter is creating uncertainty in the sector's ability to maintain the growth. Pipeline constraints are currently lowering prices of oil in the Permian Basin region of West Texas. Production in the Permian Basin is projected to nearly double, from 3.4 million barrels per day to 5.4 million barrels per day by 2023, according to a recent report by IHS Markit. Much of the increase is expected after 2020, as mid-stream energy companies complete numerous pipeline construction projects from the Permian Basin to the Gulf Coast refining centers.

Industry experts expect the oil and gas boom to continue since companies have proven their ability to make profits even when the price per barrel hovers around \$50 per barrel. Since the 2015 oil bust, many companies have been investing carefully and are better prepared to survive low oil prices. Dr. Ray Perryman of The Perryman Group suggests that energy companies believe technological advancements in drilling will likely produce higher yields at lower costs within the next five years. The Houston economy in turn is likely to have more stable growth and less unpredictability in the coming decade.

MANUFACTURING AND LOGISTICS

As online commerce expands along with the population of Texas and other south-central states, distribution and warehousing will have a larger role in Houston's economy. Fulshear is located near one of the three fulfillment/distribution hubs in Metro Houston, the far west-northwest suburbs. The Interstate 10 Corridor between Katy and Brookshire has seen tremendous growth in industrial development, and more companies continue to expand in the area. The proximity to Interstate 10 and U.S. 290 is proving to be a draw for many retailers and distributors who want central access to Houston and quick access to other parts of the growing region and state including San Antonio and Austin.

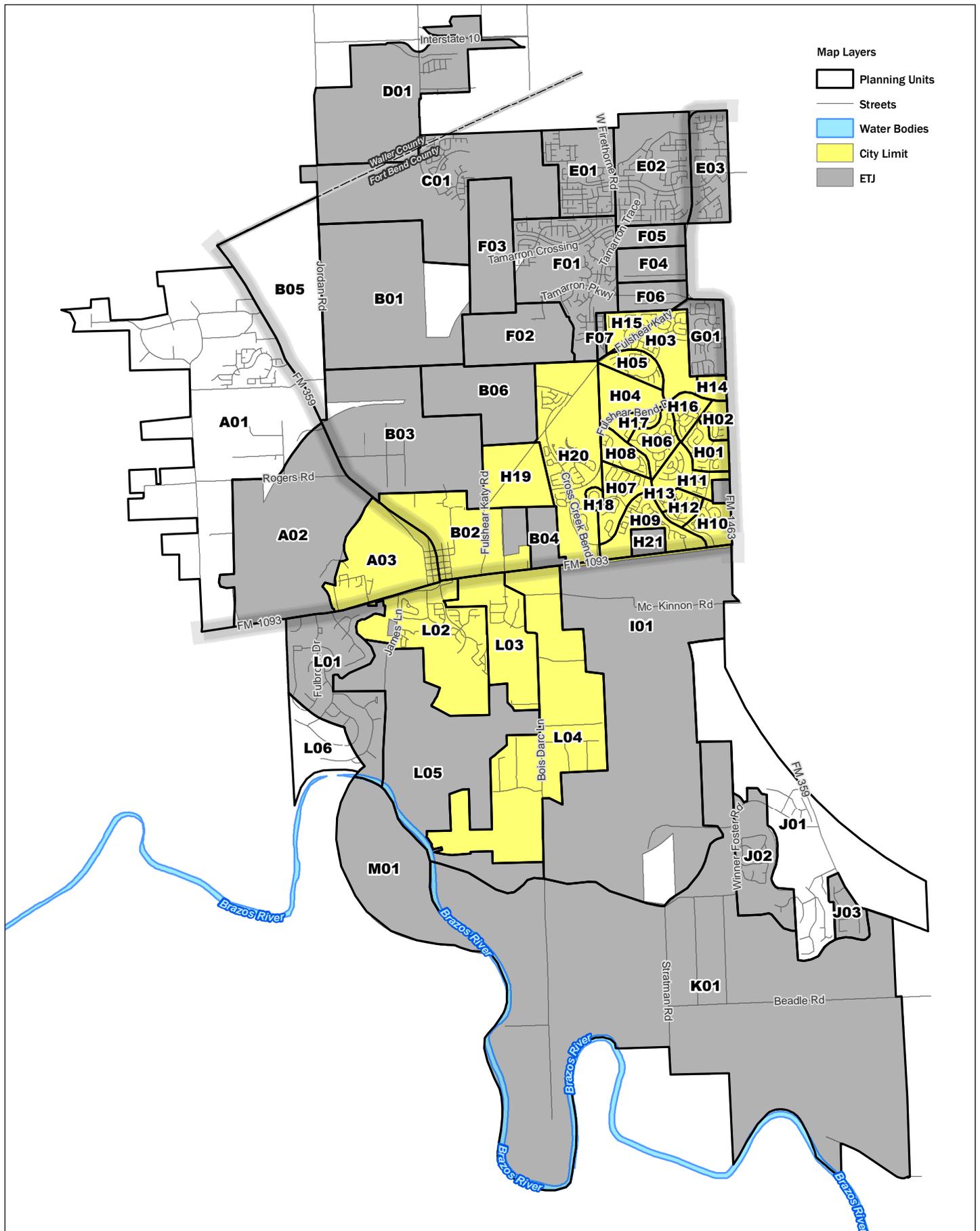
Recent industrial expansions in the region include:

- Amazon completed its 1 million-square foot fulfillment center at the northeast corner of Woods Road and Katy Freeway. The company originally planned to hire 1,000 employees to work in the warehouse in southeastern Waller County, just north of Interstate 10;
- Goya Foods expanded its north American Processing Center along U.S. 90 at Woods Road in the summer of 2018, creating 30 jobs.
- Twinwood broke ground on the 650-acre Twinwood Business Park in mid-2018. Located just inside Waller County, along and south of the future Twinwood Ranch Road, MAN Diesel & Turbo is constructing a 137,000-sq. ft. facility. The company plans to relocate its Houston and Deer Park manufacturing centers to this new facility. An estimated 142 jobs will be located at the facility which is expected to open in mid-2019. Twinwood aims to become a research and development hub for manufacturing, distribution, and light industrial companies and is part of a larger master-planned community in Simonton that will ultimately consist of approximately 10,000 acres of residential and commercial development.

- In May 2018, a new 150-acre industrial park named Pintail Crossing was announced and planned along Interstate 10 in Katy. In December 2018, Costco Wholesale Corp. purchased the entire property from Hines Development, with plans to build a regional distribution center on the site.
- Dollar Tree announced in February 2019 plans to construct a 1.2 million-sq. ft. distribution facility in Rosenberg. The City of Rosenberg is planning to annex 203 acres southwest of the intersection of Spur 10 and Klosterhoff Road for the site, and it is likely to create 200 jobs upon completion. Within three years, the facility is projected to employ 300-400.

Planning Units in the Study Area

City of Fulshear: City Limits and ETJ

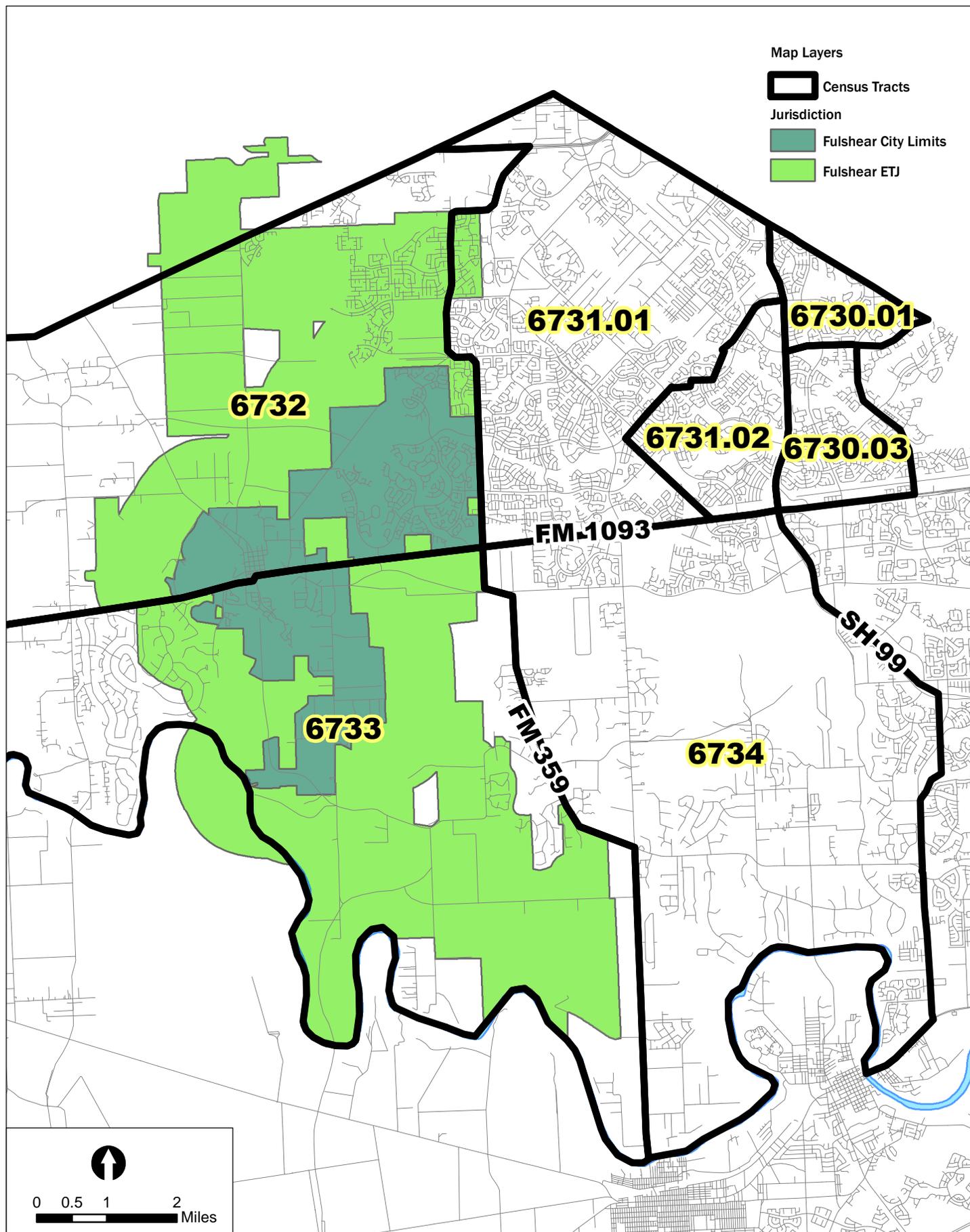


Map Layers

- Planning Units
- Streets
- Water Bodies
- City Limit
- ETJ

2010 Census Tract Boundaries

North Fort Bend County



Demographic Characteristics by Census Tract
2017 Five-Year American Community Survey



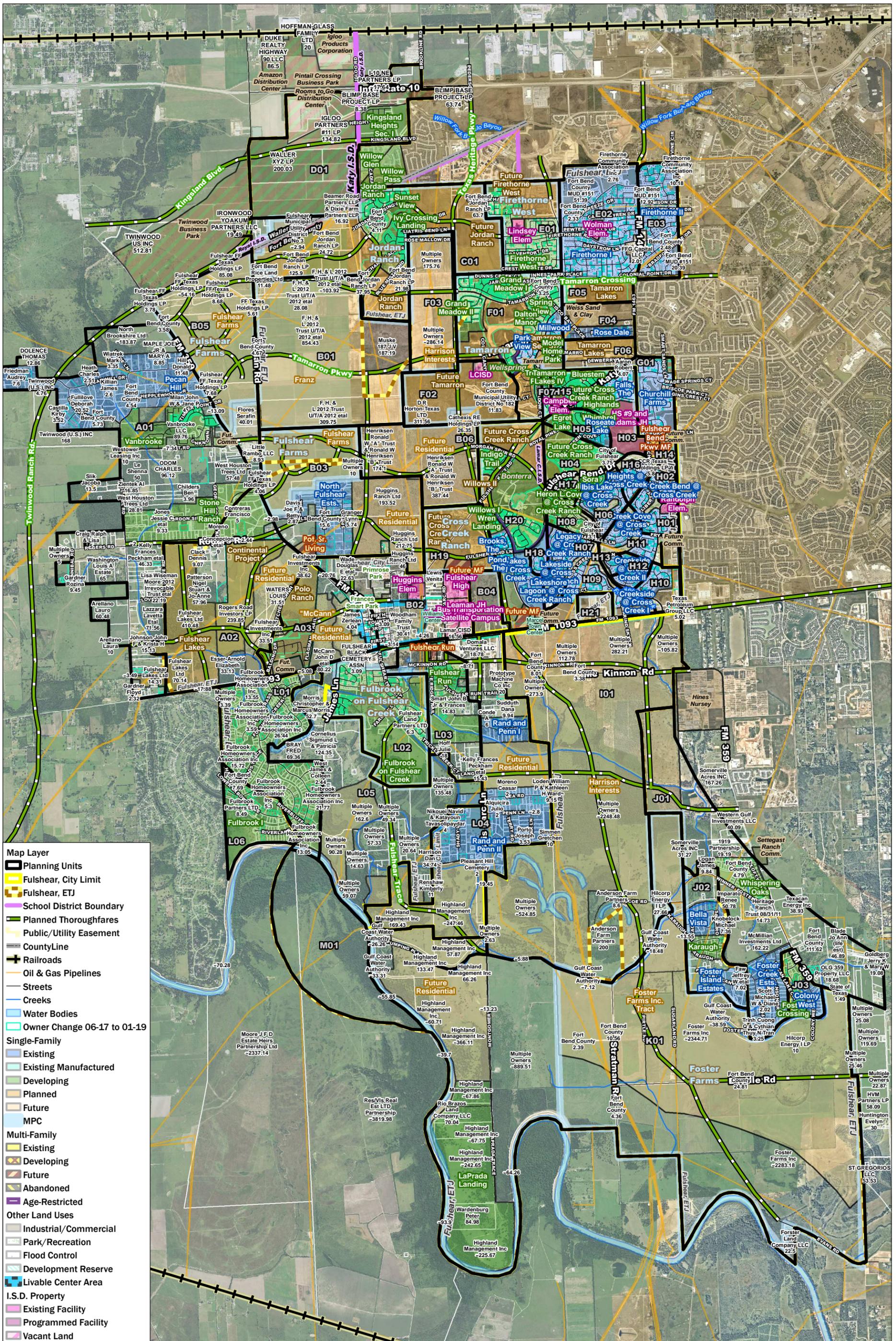
Demographic Characteristics	Tract 6730.01	Tract 6730.03	Tract 6731.01	Tract 6731.02	Tract 6732	Tract 6733	Tract 6734
Total households	2,703	3,924	18,670	5,974	4,421	2,316	7,462
Average household size	3.01	3.27	3.5	3	3.25	2.66	3.08
Total Population	8,144	12,831	65,528	17,950	14,373	6,162	22,998
Under 5	4.5%	6.0%	8.9%	4.7%	10.7%	4.4%	10.3%
Ages 5-17	23.7%	27.9%	27.1%	25.7%	23.0%	14.5%	19.7%
Ages 18-24	5.7%	6.9%	6.2%	5.8%	5.2%	4.8%	7.3%
Ages 25-34	5.4%	4.3%	9.4%	7.3%	11.4%	6.2%	12.6%
Ages 35-49	23.7%	30.3%	30.8%	27.4%	27.4%	15.5%	24.8%
Ages 50-59	18.4%	16.0%	9.1%	14.7%	12.5%	18.4%	12.6%
60 Year and Over	18.8%	8.6%	8.6%	14.3%	9.8%	36.3%	12.7%
Population 25 and Over							
Bachelor's degree or higher	69.1%	70.7%	63.8%	61.0%	56.7%	56.1%	50.2%
Labor Force Over 16							
Percent Unemployed	3.3%	1.9%	3.6%	2.8%	2.4%	2.5%	3.0%
Median Household Income	\$142,241	\$156,310	\$148,974	\$114,846	\$145,247	\$156,157	\$116,320
Housing Characteristics							
Median Home Value, Owner-Occupied	\$313,600	\$314,900	\$330,900	\$300,200	\$363,200	\$439,300	\$291,800
Owner-occupied housing units	88.1%	91.0%	85.9%	80.7%	95.4%	94.6%	92.3%
Renter-occupied housing units	11.9%	9.0%	14.1%	19.3%	4.6%	5.4%	7.7%

Residential Development Overview

City of Fulshear



0 0.5 1 2 Miles



Oil and Gas Pipelines

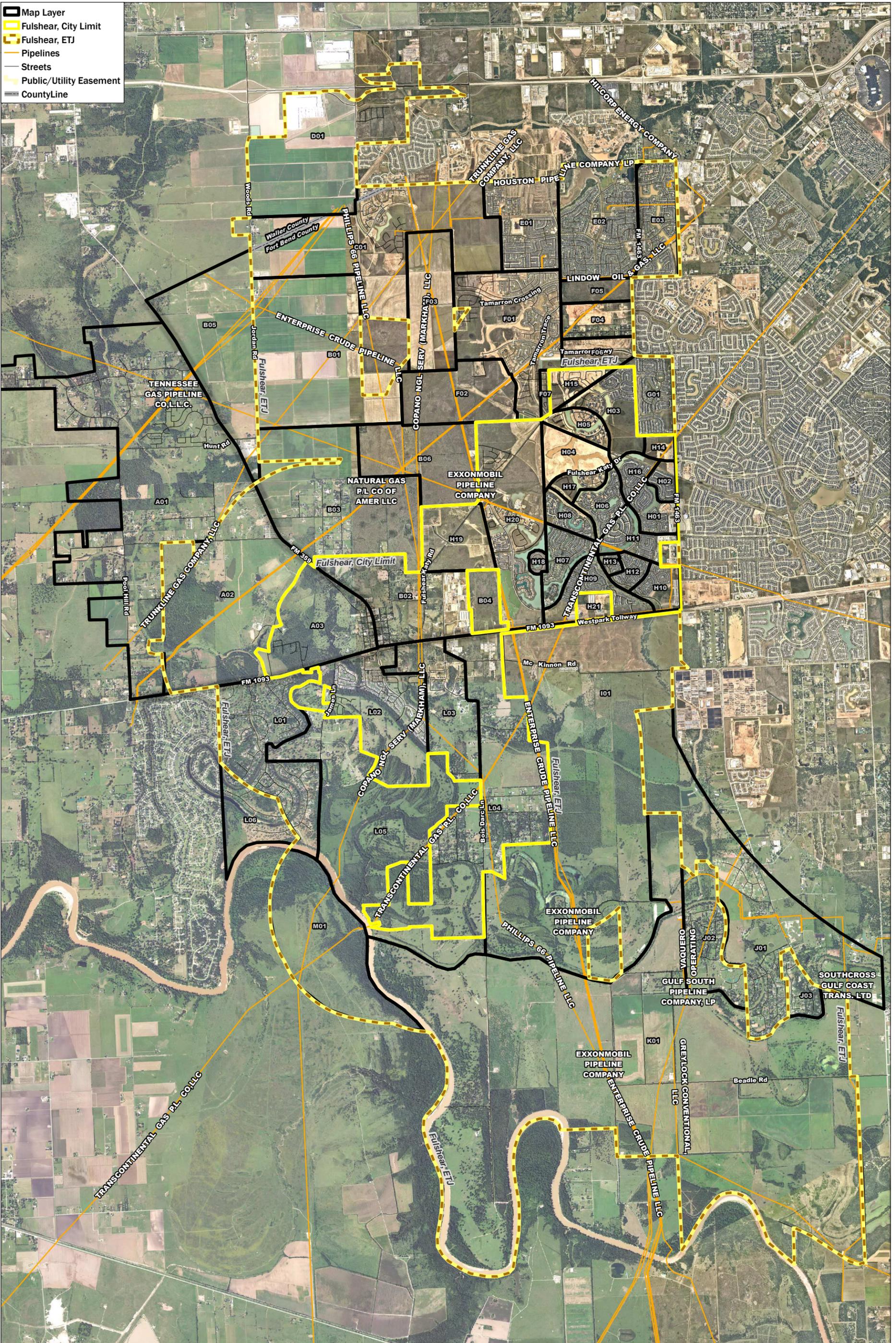
City of Fulshear



0 0.5 1 2 Miles

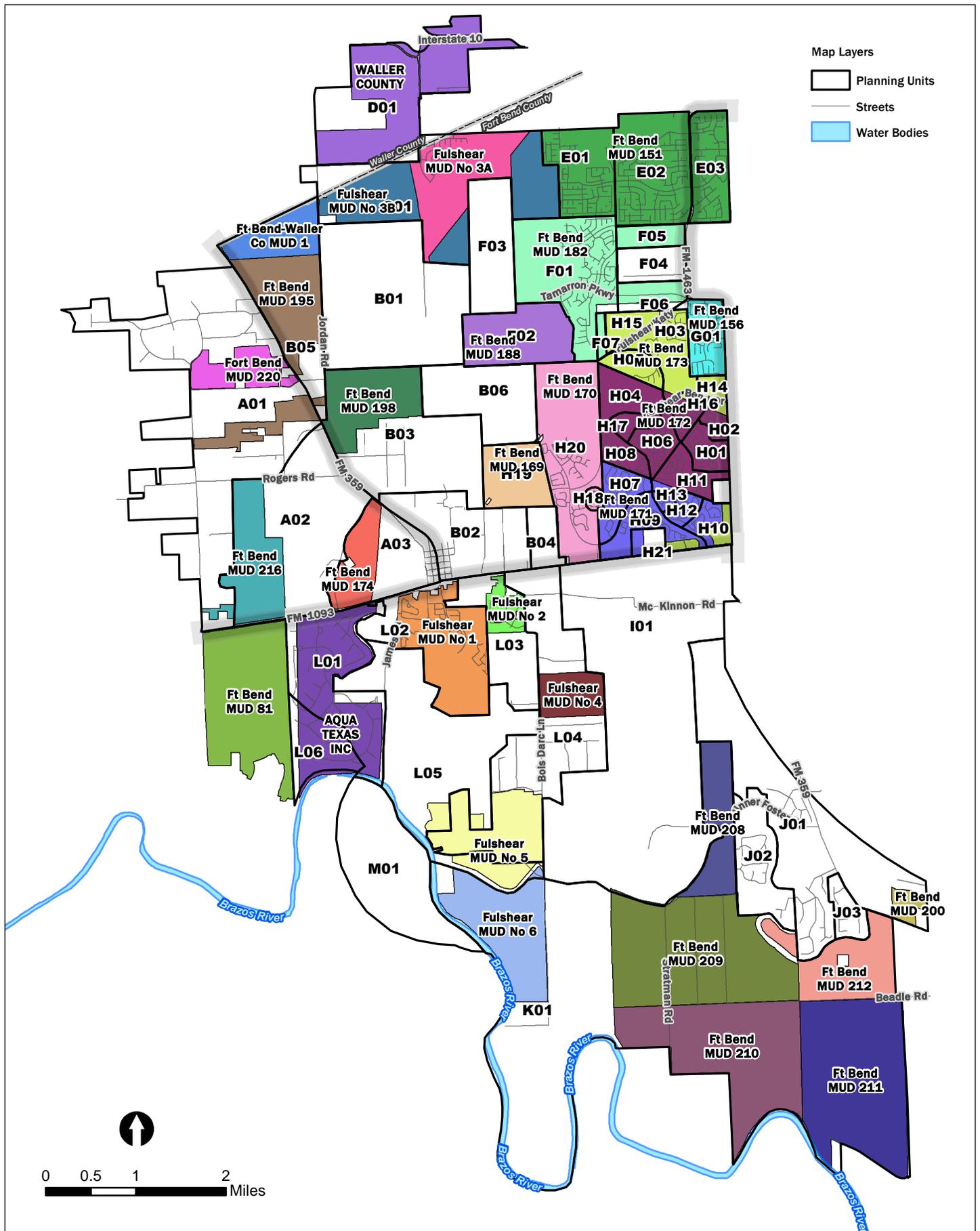


- Map Layer
- Fulshear, City Limit
- Fulshear, ETJ
- Pipelines
- Streets
- Public/Utility Easement
- CountyLine



Municipal Utility Districts

City of Fulshear: City Limits and ETJ



PROJECTED HOUSING UNITS BY PLANNING UNIT
FULSHEAR, TEXAS



Planning Unit	Area	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
A01	X	251	294	360	436	533	642	767	906	1,055	1,188	1,271
A02	ETJ	17	17	24	81	186	327	503	750	1,034	1,340	1,667
A03	CL	63	74	114	164	239	325	412	503	602	707	815
B01	ETJ	0	0	0	0	0	10	50	140	260	410	575
B02	CL	71	71	71	79	97	130	166	209	254	303	355
B03	ETJ	48	48	48	49	75	115	166	232	308	394	495
B04	ETJ	0	0	0	0	0	10	35	73	113	158	203
B05	X	0	0	0	25	85	215	410	625	880	1,160	1,455
B06	ETJ	0	0	0	0	15	50	110	200	315	435	560
C01	ETJ	224	366	576	816	1,101	1,463	1,847	2,206	2,555	2,908	3,191
D01	ETJ	0	29	79	132	192	271	373	486	597	667	717
E01	ETJ	999	1,010	1,028	1,088	1,193	1,298	1,363	1,383	1,383	1,383	1,383
E02	ETJ	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330
E03	ETJ	633	633	633	633	633	633	633	633	633	633	633
F01	ETJ	1,048	1,309	1,526	1,754	1,983	2,253	2,476	2,579	2,597	2,600	2,602
F02	ETJ	0	0	0	0	0	0	70	270	555	855	1,155
F03	ETJ	0	0	0	5	40	95	165	260	365	470	575
F04	ETJ	19	19	19	19	19	19	19	19	19	19	19
F05	ETJ	0	7	42	87	147	205	263	288	288	288	288
F06	ETJ	3	3	3	28	53	98	173	248	327	427	527
F07	ETJ	0	11	35	74	111	113	113	113	113	113	113
G01	ETJ	574	574	574	574	574	574	574	574	574	574	574
H01	CL	260	264	264	264	264	264	264	264	264	264	264
H02	CL	173	173	173	173	173	173	173	173	173	173	173
H03	CL	345	367	387	399	401	401	401	401	401	401	401
H04	CL	0	2	69	146	238	316	339	341	341	341	341
H05	CL	124	191	223	228	228	228	228	228	228	228	228
H06	CL	224	224	224	224	224	224	224	224	224	224	224
H07	CL	239	239	239	239	239	239	239	239	239	239	239
H08	CL	111	117	120	120	120	120	120	120	120	120	120
H09	CL	336	336	336	336	336	336	336	336	336	336	336
H10	CL	160	160	160	160	160	160	160	160	160	160	160
H11	CL	239	239	239	239	239	239	239	239	239	239	239
H12	CL	134	134	134	134	134	134	134	134	134	134	134
H13	CL	50	50	50	50	50	50	50	50	50	50	50
H14	CL	0	80	260	350	380	380	380	380	380	380	380
H15	CL	148	232	308	367	379	379	379	379	379	379	379
H16	CL	186	186	186	186	186	186	186	186	186	186	186
H17	CL	32	68	95	104	106	106	106	106	106	106	106
H18	CL	67	67	67	67	67	67	67	67	67	67	67
H19	CL	0	0	0	0	45	120	250	400	485	513	513
H20	CL	440	575	739	984	1,286	1,602	1,907	2,111	2,281	2,461	2,605
H21	ETJ	0	0	0	0	0	0	0	0	0	0	0
I01	ETJ	0	0	0	0	10	80	220	450	740	1,090	1,470
J01	X	134	137	141	147	154	165	177	189	202	218	234
J02	ETJ	62	62	63	64	64	65	65	66	67	67	67
J03	ETJ	46	47	49	50	51	53	53	54	55	56	57
K01	ETJ	0	0	1	1	1	12	62	146	282	447	632
L01	ETJ	258	266	273	279	284	289	293	297	301	304	307
L02	CL	335	389	454	524	599	684	774	864	954	1,044	1,134
L03	CL	34	54	80	107	136	216	292	360	389	414	439
L04	CL	133	133	133	133	135	152	191	247	310	381	457
L05	ETJ	11	11	11	11	16	23	34	54	74	100	126
L06	X	10	14	18	23	28	33	39	45	51	57	63
M01	ETJ	0	0	0	0	0	0	0	0	0	0	0

HOUSING UNIT PROJECTIONS BY JURISDICTIONAL AREA

FULSHEAR, TEXAS



Projected New Housing Units Added Annually

Area	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
City	-	521	700	652	684	770	786	704	581	548	495
ETJ	-	470	572	761	1,003	1,308	1,604	1,861	2,034	2,183	2,198
City + ETJ	-	991	1,272	1,413	1,687	2,078	2,390	2,565	2,615	2,731	2,693
Outside ETJ	-	50	74	112	169	255	338	372	423	435	400

Projected Housing Units

Area	2018 Estimate	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
City	3,904	4,425	5,125	5,777	6,461	7,231	8,017	8,721	9,302	9,850	10,345
ETJ	5,272	5,742	6,314	7,075	8,078	9,386	10,990	12,851	14,885	17,068	19,266
City + ETJ	9,176	10,167	11,439	12,852	14,539	16,617	19,007	21,572	24,187	26,918	29,611
Outside ETJ	395	445	519	631	800	1,055	1,393	1,765	2,188	2,623	3,023

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC	Pecan Hill		Stone Hill Ranch		Vanbrooke					"Continental Project"	
Name	Pecan Hill		Stone Hill Ranch		Vanbrooke					"Continental Project"	
Land Use	Single Family		Single Family		Single Family					Single Family	
Development Phase	Existing		Developing		Developing		Single Family	Single Family	Single Family	Planned	
Municipality	Fort Bend County		Fort Bend County		Fort Bend County		Fort Bend County	Fort Bend County	Fort Bend County	Fulshear ETJ	
	A01	A01	A01	A01	A01	A01	A01	A01	A01	A02	
NEW HOUSING OCCUPANCIES:	W. off Jordan & N. of Hunt built out Jan. 2013; almost built out;	Jan. 2019: 62 Occ'd, 0 Avail., 0 UC & 23 dev'd lots LTBO Jan. 2018: 60 Occ'd, 0 Avail., 0 UC & 25 dev'd lots LTBO; Jan. 2017: 59 Occ'd, 0 Avail., 0 UC & 27 dev'd lots LTBO; Jan. 2016: 59 Occ'd, 0 Avail., 0 UC & 27 dev'd lots LTBO; Jan. 2015: 45 Occ'd, 0 Avail., 1 UC & 39 dev'd lots LTBO; Jan. 2013: 43 Occ'd & 42 dev'd lots LTBO; SW along FM 359 - 225 ac. w/10+ ac. lots; fenced & roads in; scattered equestrian & cattle (ranchettes);	Jan. 2019: 3 Occ'd, 11 Avail., 23 UC & 134 dev'd lots LTBO; Jan. 2019: being cleared & adding in infrastructure, Land Tejes is planning 586 lots on 245 ac. w/1 FM 359 and Pool Hill Rd. Ph. 1 will have 159 45' and 55' lots and could deliver as early as spring 2018; ph. 2 is planned for 250 lots all on EB Woodland Trust tract; utilities and streets are being constructed now off FM 359; MUD 220 was created for utility creation; builders = Westin, Long Lake, Anglia	Jan. 2019: West Houston Trees Ltd. has ~179 ac., Shenna Le has 50.2 ac., Charles Odum has 96.1 ac., Lori Leal has 20.8 ac., Adolph Bellinoski Est. has 41.6 ac. all south along Hunt Rd.; all tracts developable but no known plans;	Jan. 2019: Frances Kelly has 46.3 ac., Lavetta Lazzara has 71.5 ac., James Burgin has ~28 ac., Alvin Sorrels owns 21.2 ac. all S. of Rogers Rd. & E. of Pool Hill Rd.;	Jan. 2019: North Brookshire Ltd. has ~183.9 ac. W. of FM 359; no known plans but likely to dev. residentially since the majority of the tract is outside the flood plain; this area is increasingly urbanizing and proximity to I-10 will draw developers	Jan. 2019: interest has increased in this property and Rooted Dev. was granted consent to create MUD 175 (296 ac.) w/ CofB but since decided not to move forward on a project here at this time; Jan. 2018: utilities that are going in along FM 1093 now will make it possible for some development on this tract--no solid plans now, but SF dev. is likely in the projection period; Jan. 2017: Rogers Road Investors has 239.8, 29.3, & 27.5 ac.; Jan. 2015: Continental Homes had purchased for ~600 SF, but now J-Dev. plans to merge these parcels w/ Jeff Duke's (McCann) tract and the Fulshear Equine parcels (Polo Ranch) (see next two columns)				
Jan 2019–Oct 2019	0	0	43	0	0	0	43	0			
Oct 2019–Oct 2020	0	1	65	0	0	0	66	0			
Oct 2020–Oct 2021	0	1	65	0	2	8	76	15			
Oct 2021–Oct 2022	0	0	70	8	4	15	97	35			
Oct 2022–Oct 2023	0	1	75	12	6	15	109	45			
Oct 2023–Oct 2024	0	0	75	22	8	20	125	48			
Oct 2024–Oct 2025	0	1	72	26	10	30	139	52			
Oct 2025–Oct 2026	0	1	68	28	12	40	149	56			
Oct 2026–Oct 2027	0	1	50	30	12	40	133	60			
Oct 2027–Oct 2028	0	1	0	30	12	40	83	64			
Jan 2019–Oct 2023	0	3	318	20	12	38	391	95			
Oct 2023–Oct 2028	0	4	265	136	54	170	629	280			
Jan 2019–Oct 2028	0	7	583	156	66	208	1,020	375			
Med. Household Size	2.20	2.65	3.05	3.00	2.95	2.95	x	3.04			

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC	Fulshear Lakes	Fulshear Lakes	Future SF		"McCann and Grandes Ricos"	Polo Ranch	
Name	Fulshear Lakes	Fulshear Lakes	Future SF		"McCann and Grandes Ricos"	Polo Ranch	
Land Use	Single Family	Multi-Family	Single Family		Single Family	Single Family	
Development Phase	Planned	Planned	Probable		Probable	Developing	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ		Fulshear	Fulshear	
	A02	A02	A02	A02	A03	A03	A03
NEW HOUSING OCCUPANCIES:	<p>Jan. 2019: Yager is awaiting for the final results of FEMA Lower Brazos River study and anticipates development to begin in 2019 and the first homes to start going in in mid- to late-2020; now planned for ~1,200 lots with homes 200-600K; Jan. 2018: City and real estate brokers state infrastructure connection at FM 1093 and Weston Dr. was planned in 2017; now, utilities are being put in that will connect the dev. with the City of Fulshear—this was delayed SVI states home construction should begin in 2019 with 125-175 homes built annually once the development gets up and running; 2017: front yard maintenance may be provided w/ communal greenspace; last year, new homes were expected to be occupied by 2018 but the project has not started; Sam Yager dev.; 400 MF units allowed in dev. Agreement with City; Jan. 2016: City and Tiffany Lamsa w/Yager both stated 1,299 SF in 2015; Westheimer-Fulshear parcel was to have 1,800 SF & 500 MF; Elem. School planned & MF & potential comm. N. on FM 1093; MUD obtained through TCEQ; used Pepe Schwartz as attorney; dev'er expects build out in 7-8 years;</p>	<p>Jan. 2019: infrastructure is started for SF and still plans for 500 MF, along w/school and comm. N. on FM 1093 (Yager has Fulshear Lakes Ltd=74 & 400 ac. & Sheffield 70 ac.) MUD obtained through TCEQ; 400 MF units allowed;</p>	<p>Jan. 2019: L. Waters and Mason Equest Inv. has ~273 ac. currently used as ranch and polo field; In 2015, a joint venture between J.Dev. & L. Waters formed; but now Johnson may acquire these parcels and Lou Waters' ~113 ac. but development is not expected until the polo center is not in use which could take 5+ years; 1,000+ homes possible</p>		<p>Jan. 2019: John McCann and Carole Ann McCann have ~154 ac. in City Limits zoned for estate lots but developers have been requesting smaller lot sizes in order to develop here; Grandes Ricos LLC recently purchased ~44 ac. from the McCann's along Wallis Rd. and 6 ac. of the 44 were sold to Thrive Church; a PUD is being created for the Fulshear Cemetery, Thrive Church, and future Texana Center for Autism along Wallis St. at FM 359. Future SF dev. is likely here, but it will be large-lot residential per the City of Fulshear</p>	<p>Jan. 2019: utilities are going in and streets are being cut for the first three phases which have now been platted (Sec. 1 = 37 lots; Sec. 2 = 42 lots; Sec. 3 = 71 lots) for homes priced ~160-200K targeting first time buyers; Jan. 2018: Century Land Holdings purchased and is developing 217.7 ac. to be called Polo Ranch—a 751-home community with a commercial reserve along FM 1093; utilities are being extended along FM 1093 now and the first homes are expected to be up in the beginning of 2019; In 2015 Beazer planned 615 SF w/lots (250-500K); first home was scheduled to close in 2016</p>	
Jan 2019–Oct 2019	0	0	0	0	0	11	11
Oct 2019–Oct 2020	7	0	0	7	0	40	40
Oct 2020–Oct 2021	42	0	0	57	2	48	50
Oct 2021–Oct 2022	70	0	0	105	7	68	75
Oct 2022–Oct 2023	95	0	1	141	11	75	86
Oct 2023–Oct 2024	120	5	3	176	12	75	87
Oct 2024–Oct 2025	135	50	10	247	16	75	91
Oct 2025–Oct 2026	145	70	13	284	19	80	99
Oct 2026–Oct 2027	150	80	16	306	25	80	105
Oct 2027–Oct 2028	150	95	18	327	28	80	108
Jan 2019–Oct 2023	214	0	1	310	20	242	262
Oct 2023–Oct 2028	700	300	60	1,340	100	390	490
Jan 2019–Oct 2028	914	300	61	1,650	120	632	752
Med. Household Size	3.18	1.60	2.65	x	2.85	3.11	x

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC	Fulshear Farms			Jordan Ranch	Jordan Ranch	Jordan Ranch	
Name	Fulshear Farms			Sunset View	Ivy Crossing	Sage Landing	
Land Use	Single Family		Single Family	Single Family	Single Family	Single Family	
Development Phase	Planned		Probable	Developing	Developing	Developing	
Municipality	Fort Bend County		Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	
	B05	B05	B06	B06	C01	C01	C01
NEW HOUSING OCCUPANCIES:	<p>Jan. 2019: Fulshear FF Texas Holdings LP (Johnson Dev.) has purchased 1,244 ac. in two tracts E, along FM 359 and will be developed in the short-term; Jan. 2016: have no City dev. agreement yet but future arterials will connect this dev. to Cross Creek Ranch and Jordan Ranch 2015: Johnson Dev. bought the Alamo/Parkside tracts; was owned by Moody's;</p>		<p>Jan. 2019: Ronald Henriksen has 387.4 & 174 ac.; purchased in 2008 from HWR; now set up in a trust; this tract will dev. at optimum time frame; HWR had bought the 174 ac. from Pacific Financial & the 387 ac. from Perry Cook Trustee); all tracts are NW of Cross Creek;</p>		<p>246 total lots in this section Jan. 2019: 175 Occ'd, 22 Avail., 13 Model Homes, 8 UC & 28 dev'd lots LTBO; Jan. 2018: 96 Occ'd, 37 Avail., 21 UC & 96 dev'd lots LTBO; developer has plans for 23 future lots to complete this section builders: J.Patrick, Highland, Westin, Perry, Newmark, Plantation & David Weekley Homes Jan. 2017: 11 Occ'd, 26 Avail., 24 UC & 165 dev'd lots LTBO;</p>	<p>397 total lots in this section Jan. 2019: 25 Occ'd, 0 Avail., 0 UC & 0 dev'd lots LTBO; Sec. 6 & 7 now platted for 29 + 16 lots; Jan. 2018: 14 Occ'd, 2 Avail., 5 UC & 3 dev'd lots LTBO;</p>	<p>335 total lots in this section Jan. 2019: 24 Occ'd, 15 Avail., 31 UC & 127 dev'd lots LTBO; Sec. 13 & 16 now platted for 39 + 41 lots + an additional 58 lots are planned; builders: Lennar, Perry, Weekley, Westin, Chesmar, Highland, J. Patrick;</p>
Jan 2019–Oct 2019	0	0	0	0	42	10	75
Oct 2019–Oct 2020	0	0	0	0	5	35	95
Oct 2020–Oct 2021	25	25	0	0	0	0	85
Oct 2021–Oct 2022	60	60	15	15	3	0	52
Oct 2022–Oct 2023	130	130	35	35	3	0	4
Oct 2023–Oct 2024	195	195	60	60	4	0	0
Oct 2024–Oct 2025	215	215	90	90	4	0	0
Oct 2025–Oct 2026	255	255	115	115	4	0	0
Oct 2026–Oct 2027	280	280	120	120	3	0	0
Oct 2027–Oct 2028	295	295	125	125	3	0	0
Jan 2019–Oct 2023	215	215	50	50	53	45	311
Oct 2023–Oct 2028	1,240	1,240	510	510	18	0	0
Jan 2019–Oct 2028	1,455	1,455	560	560	71	45	311
Med. Household Size	3.20	x	3.20	x	3.23	3.23	3.23

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC	Jordan Ranch	Jordan Ranch		Point West	Kingsland Heights	
Name	Future Jordan Ranch	Jordan Ranch				
Land Use	Single Family	Multi-Family		Multi-Family	Single Family	
Development Phase	Planned	Planned		Probable	Developing	
Municipality	Fulshear ETJ	Fulshear ETJ		Fulshear ETJ	Fulshear ETJ	
	C01	C01	C01	D01	D01	D01
NEW HOUSING OCCUPANCIES:	<p>Jan. 2019: new concept plans has 2,977 total lots with 2,817 in LCISD; Jan. 2018: Johnson Development has 1,354 ac. in 3 ISDs (95% in LCISD); 700 MF units allowed by dev. agreement w/ City; concept plan shows 2,795 total lots in LCISD; 757 lots east of phase 1 and 1,368 lots west and south of Phase 1; the area south and west of Phase 1 will develop next and development eastward will occur later as infrastructure and Texas Heritage Pkwy. are built later;</p> <p>Jan. 2016: plan for 2,800 SF (Oct. 27, 2015) (but was 4,000 SF via City & earlier concept plan) (earlier in 2015 - ~2,700 lots in L.C.I.S.D.) (was < 1,000 ac. of Franz parcels & ~700 ac. of Silco (Silvestri) parcels; excluding the upper half of the Harrison tract)</p>	<p>Jan. 2019: Fort Bend Jordan Ranch LP has 1,290 ac.; in this PU; 700 MF units are allowed per City dev. agreement; MF would likely be added later in the projection period along future Texas Heritage Pkwy.</p>		<p>Jan 2019: Waller Co. Road Improvement District has been created here to serve the area that will be an industrial complex with commercial and retail; MF is possible here long-term</p>	<p>Oct 2018: Starlight Homes is developing 462 SF homes in the WCRID just south of I-10 and east of Jordan Ranch Blvd.; utilities are going in (May 2018) for phase 1; Starlight is a brand within the Ashton Woods family and builds starter homes for prices at less than \$1,000/mo.</p>	
Jan 2019–Oct 2019	15	0	142	0	29	29
Oct 2019–Oct 2020	75	0	210	0	50	50
Oct 2020–Oct 2021	155	0	240	0	53	53
Oct 2021–Oct 2022	230	0	285	0	60	60
Oct 2022–Oct 2023	300	55	362	15	64	79
Oct 2023–Oct 2024	305	75	384	40	62	102
Oct 2024–Oct 2025	270	85	359	50	63	113
Oct 2025–Oct 2026	250	95	349	50	61	111
Oct 2026–Oct 2027	235	115	353	50	20	70
Oct 2027–Oct 2028	165	115	283	50	0	50
Jan 2019–Oct 2023	775	55	1,239	15	256	271
Oct 2023–Oct 2028	1,225	485	1,728	240	206	446
Jan 2019–Oct 2028	2,000	540	2,967	255	462	717
Med. Household Size	3.23	1.92	x	1.80	3.30	x

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC	Tamarron	Tamarron	Tamarron	Tamarron	Tamarron	Tamarron
Name	Grand Meadow I	Grand Meadow II	Trenton Park	Section 57	Millwood	model home park
Land Use	Single Family	Single Family	Single Family	Single Family	Single Family	Single Family
Development Phase	Developing	Developing	Developing	Planned	Existing	Developing
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ
	F01	F01	F01	F01	F01	F01
NEW HOUSING OCCUPANCIES:	654 total lots Jan. 2019: 572 Occ'd, 32 Avail., 50 UC & 0 dev'd lots LTBO; Jan. 2018: 392 Occ'd, 22 Avail., 65 UC & 61 dev'd lots LTBO; Sec. 32 is going in now w/ 140 lots & Sec. 36 has a plat for 102 future lots; builder: Express Homes Jan. 2017: 224 Occ'd, 31 Avail., 68 UC & 77 dev'd lots LTBO; Jan. 2016: 72 Occ'd, 39 Avail., 54 UC & 143 dev'd lots LTBO;	Jan. 2019: 0 Occ'd, 0 Avail., 33 UC & 70 dev'd lots LTBO; Sec. 29 platted for 103 lots in July 2017 and Sec. 43 platted for 126 lots in Aug. 2018 & Sec. 53 platted for 115 lots in Aug. 2019 (344 total lots); D.R. Horton plans on building homes in the Spring of 2018 in these sections	Jan. 2019: 3 Occ'd, 5 Avail., 13 UC & 53 dev'd lots LTBO; Jan. 2018: Sec. 16 platted for 74 lots; Jan. 2017: infrastructure is ready	Jan. 2019: platted for 8 lots in Oct. 2018	111 total lots; Jan. 2019: built out; Jan. 2018: 102 Occ'd, 9 Avail., 0 UC & 0 dev'd lots LTBO; almost built out; builders: Perry & D.R. Horton Homes Jan. 2017: 68 Occ'd, 14 Avail., 5 UC & 24 dev'd lots LTBO; Jan. 2016: 34 Occ'd, 14 Avail., 9 UC & 54 dev'd lots LTBO;	17 total lots Jan. 2019: 3 Occ'd, 7 Avail., 0 UC & 7 dev'd lots LTBO; builders: Express Homes & D.R. Horton DHI Mortgage - mortgage company for D.R. Horton Jan. 2017: 0 Occ'd, 8 Avail., 0 UC & 9 dev'd lots LTBO; Jan. 2016: 0 Occ'd, 8 Avail., 0 UC & 9 dev'd lots LTBO;
Jan 2019–Oct 2019	82	55	32	1	0	0
Oct 2019–Oct 2020	0	130	35	7	0	0
Oct 2020–Oct 2021	0	130	4	0	0	0
Oct 2021–Oct 2022	0	24	0	0	0	0
Oct 2022–Oct 2023	0	5	0	0	0	0
Oct 2023–Oct 2024	0	0	0	0	0	3
Oct 2024–Oct 2025	0	0	0	0	0	3
Oct 2025–Oct 2026	0	0	0	0	0	3
Oct 2026–Oct 2027	0	0	0	0	0	3
Oct 2027–Oct 2028	0	0	0	0	0	2
Jan 2019–Oct 2023	82	344	71	8	0	0
Oct 2023–Oct 2028	0	0	0	0	0	14
Jan 2019–Oct 2028	82	344	71	8	0	14
Med. Household Size	3.20	3.20	3.20	3.20	3.34	3.25

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC	Tamarron	Tamarron	Tamarron	Tamarron		Tamarron	
Name	Park View	Spring View	Future Land	Wellspring		Future Land	
Land Use	Single Family	Single Family	Single Family	Single Family Age-Restricted		Single Family	
Development Phase	Existing	Developing	Planned	Developing		Planned	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ		Fulshear ETJ	
	F01	F01	F01	F01	F01	F02	F02
NEW HOUSING OCCUPANCIES:	<p>Jan. 2018: built out; Jan. 2017: 105 Occ'd, 3 Avail., 0 UC & 0 dev'd lots LTBO; almost built out; builder: D.R. Horton Homes Jan. 2016: 73 Occ'd, 18 Avail., 12 UC & 5 dev'd lots LTBO;</p>	<p>204 total lots Jan. 2019: 167 Occ'd, 14 Avail., 23 UC & 0 dev'd lots LTBO; Jan. 2018: 129 Occ'd, 20 Avail., 7 UC & 50 dev'd lots LTBO; builder: D.R. Horton Homes Jan. 2017: 63 Occ'd, 36 Avail., 9 UC & 98 dev'd lots LTBO; Jan. 2016: 18 Occ'd, 23 Avail., 20 UC & 145 dev'd lots LTBO;</p>	<p>Jan. 2019: D.R. Horton Texas LTD will construct half of Tamarron Crossing Blvd. just east of the District border for a new connection to FM 1463 by early 2019; road and utility connections to the LCISD elem. site are also progressing; approximately 715 additional acres remain unplatted in LCISD that could have upwards of 2,146 lots (~875 lots in PU F01);</p>	<p>55+ development Jan. 2019: 47 Occ'd, 6 Avail., 17 UC & 40 dev'd lots LTBO; Jan. 2018: 20 Occ'd, 9 Avail., 9 UC & 71 dev'd lots LTBO; builder: Freedom Homes Jan. 2017: 2 Occ'd, 8 Avail., 9 UC & 90 dev'd lots LTBO; Jan. 2016: 0 Occ'd, 0 Avail., 0 UC & 109 dev'd lots LTBO; streets are in & about to start home construction;</p>		<p>Jan. 2019: D.R. Horton Texas LTD will construct half of Tamarron Crossing Blvd. just east of the District border for a new connection to FM 1463 by early 2019; road and utility connections to the LCISD elem. site are also progressing; approximately 715 additional acres remain unplatted in LCISD that could have upwards of 2,031 lots (~1,156 lots in PU F02);</p>	
Jan 2019–Oct 2019	0	37	0	30	261	0	0
Oct 2019–Oct 2020	0	0	0	23	217	0	0
Oct 2020–Oct 2021	0	0	70	10	228	0	0
Oct 2021–Oct 2022	0	0	205	0	229	0	0
Oct 2022–Oct 2023	0	0	265	0	270	0	0
Oct 2023–Oct 2024	0	0	220	0	223	70	70
Oct 2024–Oct 2025	0	0	100	0	103	200	200
Oct 2025–Oct 2026	0	0	15	0	18	285	285
Oct 2026–Oct 2027	0	0	0	0	3	300	300
Oct 2027–Oct 2028	0	0	0	0	2	300	300
Jan 2019–Oct 2023	0	37	540	63	1,205	0	0
Oct 2023–Oct 2028	0	0	335	0	349	1,155	1,155
Jan 2019–Oct 2028	0	37	875	63	1,554	1,155	1,155
Med. Household Size	3.22	3.18	3.20	1.75	x	3.20	x

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC	Tamarron		Churchill Farms		Cross Creek		Cross Creek		Cross Creek		Cross Creek
Name	Tamarron Sec. 24 and 31		Churchill Farms		Creek Bend		Creek Bend		Highlands		The Falls
Land Use	Single Family		Single Family		Single Family		Single Family		Single Family		Single Family
Development Phase	Planned		Existing		Existing		Existing		Developing		Existing
Municipality	Fulshear ETJ		Fulshear ETJ		Fulshear		Fulshear		Fulshear		Fulshear
	F07	F07	G01	G01	H01	H01	H02	H02	H03	H03	H03
	Oct. 2018: Tamarron "silver" by Cross Creek; sec. 24+51 and sec. 31+62 lots		built out		Oct. 2018: model homes park on Grayson Gap is being built out and occupied now; Oct. 2017: almost built out, except model home section; w/ 12 Available models & 7 dev'ed lots LTBO; Highland, Newmark, Lennar, Trendmaker, Perry & Village Bldrs		built out		Oct. 2018: 67 Occ'ed, 5 Avail., 7 UC & 44 dev'ed lots LTBO; Oct. 2017: 44 Occ'ed, 4 Avail., 14 UC & 14 dev'ed lots LTBO; has plans for 47 future lots in this area; Sept. 2016: 8 Occ'ed, 14 Avail., 2 UC & 52 dev'ed lots LTBO; has plans for 54 future lots in this area;		Oct. 2018: built out; April 2017: 276 Occ'ed, 0 Avail., 0 UC & 2 dev'ed lots LTBO; Sept. 2016: 164 Occ'ed, 28 Avail., 46 UC & 40 dev'ed lots LTBO;
NEW HOUSING OCCUPANCIES:											
Jan 2019–Oct 2019	11	11	0	0	4	4	0	0	22	0	22
Oct 2019–Oct 2020	24	24	0	0	0	0	0	0	20	0	20
Oct 2020–Oct 2021	39	39	0	0	0	0	0	0	12	0	12
Oct 2021–Oct 2022	37	37	0	0	0	0	0	0	2	0	2
Oct 2022–Oct 2023	2	2	0	0	0	0	0	0	0	0	0
Oct 2023–Oct 2024	0	0	0	0	0	0	0	0	0	0	0
Oct 2024–Oct 2025	0	0	0	0	0	0	0	0	0	0	0
Oct 2025–Oct 2026	0	0	0	0	0	0	0	0	0	0	0
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0	0
Oct 2027–Oct 2028	0	0	0	0	0	0	0	0	0	0	0
Jan 2019–Oct 2023	113	113	0	0	4	4	0	0	56	0	56
Oct 2023–Oct 2028	0	0	0	0	0	0	0	0	0	0	0
Jan 2019–Oct 2028	113	113	0	0	4	4	0	0	56	0	56
Med. Household Size	3.20	x	3.30	x	3.30	x	3.30	x	3.40	3.40	x

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek		
Name	Cross Creek		Egret Lake		Roseate Lake		Whimbrel Lake		Ibis Lake		Lake Shore Lagoon		Lakeside/Legacy
Land Use	Single Family		Single Family		Single Family		Single Family		Single Family		Single Family		Single Family
Development Phase	Developing		Developing		Existing		Developing		Existing		Existing		Existing
Municipality	Fulshear		Fulshear		Fulshear		Fulshear		Fulshear		Fulshear		Fulshear
	H04	H04	H05	H05	H05	H05	H05	H05	H06	H06	H06	H07	H07
NEW HOUSING OCCUPANCIES:	<p><i>Oct. 2017: being leveled - adding in streets & infrastructure; plans for 341 SF lots on remaining tracts in this PU</i></p> <p><i>Oct. 2018: 1 Occ'd, 2 Avail., 28 UC & 34 deved lots LTBO; Oct. 2017: being leveled - adding in streets & infrastructure; plans for 66 SF lots on remaining tracts in this PU</i></p> <p><i>Oct. 2018: 74 Occ'd, 2 Avail., 0 UC & 0 deved lots LTBO; Oct. 2017: 52 Occ'd, 9 Avail., 10 UC & 5 deved lots LTBO; Sept. 2016: 6 Occ'd, 5 Avail., 11 UC & 54 deved lots LTBO;</i></p> <p><i>Oct. 2018: 49 Occ'd, 4 Avail., 19 UC & 16 deved lots LTBO; Oct. 2017: 18 Occ'd, 7 Avail., 13 UC & 50 deved lots LTBO;</i></p> <p><i>Oct. 2018: built out; Oct. 2017: 223 Occ'd, 2 Avail., 4 UC & 1 deved lots LTBO; Sept. 2016: 184 Occ'd, 13 Avail., 11 UC & 22 deved lots LTBO;</i></p>												
Jan 2019–Oct 2019	2	2	34	0	0	33	67	0	0	0	0	0	0
Oct 2019–Oct 2020	67	67	26	0	0	6	32	0	0	0	0	0	0
Oct 2020–Oct 2021	77	77	5	0	0	0	5	0	0	0	0	0	0
Oct 2021–Oct 2022	92	92	0	0	0	0	0	0	0	0	0	0	0
Oct 2022–Oct 2023	78	78	0	0	0	0	0	0	0	0	0	0	0
Oct 2023–Oct 2024	23	23	0	0	0	0	0	0	0	0	0	0	0
Oct 2024–Oct 2025	2	2	0	0	0	0	0	0	0	0	0	0	0
Oct 2025–Oct 2026	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2027–Oct 2028	0	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2019–Oct 2023	316	316	65	0	0	39	104	0	0	0	0	0	0
Oct 2023–Oct 2028	25	25	0	0	0	0	0	0	0	0	0	0	0
Jan 2019–Oct 2028	341	341	65	0	0	39	104	0	0	0	0	0	0
Med. Household Size	3.40	x	3.40	3.35	3.35	x	3.35	x	3.35	3.35	3.35	3.35	3.35

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC	Cross Creek	Cross Creek	Cross Creek		Cross Creek			Cross Creek	Cross Creek			
Name	Heron Lakes	Creekside at Cross Creek I	Creekside at Cross Creek II		Creekside at Cross Creek II			Creek Cove @ Cross Creek	Creekside at Cross Creek II			
Land Use	Single Family	Single Family	Single Family		Single Family		Single Family	Single Family	Single Family			
Development Phase	Developing	Existing	Existing		Existing		Existing	Existing	Existing			
Municipality	Fulshear	Fulshear	Fulshear		Fulshear		Fulshear	Fulshear	Fulshear			
	H07	H08	H08	H09	H09	H10	H10	H10	H10	H11	H11	H11
		Oct. 2018: 111 Occ'd, 2 Avail., 5 UC & 4 dev'd lots LTBO; Oct. 2017: 108 Occ'd, 2 Avail., 1 UC & 11 dev'd lots LTBO; builders: Darling Homes & Partners in Building; Sept. 2016: 90 Occ'd, 9 Avail., 6 UC & 16 dev'd lots LTBO;		built out		built out	Aug. 2016: Landmark Industries has 22.2 ac.;	Aug. 2016: Landmark Industries has 13.5 & 13.5 ac.; on corner of Westpark Tollway & FM 1463;		built out		built out
NEW HOUSING OCCUPANCIES:												
Jan 2019–Oct 2019	0	6	6	0	0	0	0	0	0	0	0	0
Oct 2019–Oct 2020	0	3	3	0	0	0	0	0	0	0	0	0
Oct 2020–Oct 2021	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2021–Oct 2022	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2022–Oct 2023	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2023–Oct 2024	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2024–Oct 2025	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2025–Oct 2026	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2027–Oct 2028	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2019–Oct 2023	0	9	9	0	0	0	0	0	0	0	0	0
Oct 2023–Oct 2028	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2019–Oct 2028	0	9	9	0	0	0	0	0	0	0	0	0
Med. Household Size	x	3.35	x	3.20	x	3.25	1.95	1.95	x	3.35	3.20	x

PROJECTED NEW HOUSING OCCUPANCIES, 2019-2028
POPULATION AND SURVEY ANALYSTS



MPC	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek
Name	Creekside at Cross Creek II		Creekside at Cross Creek II		Park Lane Fulshear		Bluestem		Heights		Dublin Cove		Sora Lake
Land Use	Single Family		Single Family		Multi-Family		Single Family		Single Family		Single Family		Single Family
Development Phase	Existing		Existing		Developing		Developing		Existing		Developing		Developing
Municipality	Fulshear		Fulshear		Fulshear		Fulshear		Fulshear		Fulshear		Fulshear
	H12	H12	H13	H13	H14	H14	H15	H15	H16	H16	H17	H17	H17
	built out		built out		Oct. 2018: Judwin Properties is developing 380 units (costar) (CCR 21 LLC 21.6 ac. parcel) (was earlier considered for 442 units)		Oct. 2018: 148 Occ'd, 10 Avail., 36 UC & 140 dev'd lots LTBO + 8.19 acres that could have ~45 lots; Oct. 2017: 21 Occ'd, 28 Avail., 31 UC & 107 dev'd lots LTBO; has 40.68 & 4.55 acres, which are planned for 192 future lots; builders: Perry, Newmark, Highland & Lennar Homes		built out		Oct. 2018: 7 Occ'd, 7 Avail., 18 UC & 24 dev'd lots LTBO; Oct. 2017: has 22.62 acres, which has a preliminary plan for 57 SF lots; Sept. 2016: has 22.62 acres, which has a preliminary plan for 51 SF lots;		50 total lots; Oct. 2018: 25 Occ'd, 3 Avail., 3 UC & 19 dev'd lots LTBO; Oct. 2017: 17 Occ'd, 2 Avail., 4 UC & 27 dev'd lots LTBO; builders: Avanti, Darling, Trendmaker & Partners in Building
NEW HOUSING OCCUPANCIES:													
Jan 2019-Oct 2019	0	0	0	0	80	80	84	84	0	0	29	7	36
Oct 2019-Oct 2020	0	0	0	0	180	180	76	76	0	0	18	9	27
Oct 2020-Oct 2021	0	0	0	0	90	90	59	59	0	0	2	7	9
Oct 2021-Oct 2022	0	0	0	0	30	30	12	12	0	0	0	2	2
Oct 2022-Oct 2023	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2023-Oct 2024	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2024-Oct 2025	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2025-Oct 2026	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2026-Oct 2027	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2027-Oct 2028	0	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2019-Oct 2023	0	0	0	0	380	380	231	231	0	0	49	25	74
Oct 2023-Oct 2028	0	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2019-Oct 2028	0	0	0	0	380	380	231	231	0	0	49	25	74
Med. Household Size	3.20	x	3.20	x	2.14	x	3.40	x	3.30	x	3.40	3.40	x

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC	Cross Creek Ranch		Cross Creek Ranch		Cross Creek Ranch		Cross Creek Ranch		Cross Creek Ranch	
Name	Lakes of Cross Creek		Future Cross Creek Ranch		Bonterra		Future Cross Creek Ranch		Future MF	
Land Use	Single Family		Single Family		Single Family Age-Restricted		Single Family		Multi-Family	
Development Phase	Existing		Planned		Developing		Planned		Planned	
Municipality	Fulshear		Fulshear		Fulshear		Fulshear		Fulshear	
	H18	H18	H19	H19	H20	H20	H20	H20	H20	
	built out		Jan. 2019: Future phases of Cross Creek Ranch N. of Fulshear HS will consist of 513 lots; expect build out of these sections to happen quickly due to new schools and future Texas Heritage Pkwy.; an additional 50 lots could be located on a site reserved for an elementary school in the concept plan		concept plan shows 738 total lots; Jan. 2019: 81 Occ'd, 6 Avail., 16 UC & 176 dev'd lots LTBO; Jan. 2018: 40 Occ'd, 9 Avail., 12 UC & 70 dev'd lots LTBO; has a concept plan for 607 future lots, streets going in now; builder: Taylor Morrison Homes; Jan. 2017: Johnson Development has 268 ac. for a planned age-restricted, gated community; Rob Bamford = General Manager of Cross Creek; Taylor Morrison is the builder; Jan. 2017: 2 Occ'd, 15 Avail., 12 UC & 100 dev'd lots LTBO;		Jan. 2019: Future phases of Cross Creek Ranch N. of Bonterra will consist of 489 lots (per latest land plan from Nov 2018--not increase of 15% from plan two years ago); expect build out of these sections to happen quickly due to new schools and future Texas Heritage Pkwy.; these future sections will begin to rapidly be developed as the KISD portion of CCR builds out in 2-3 years;		Jan. 2019: Judwin recently purchased a 14.8 ac. MF tract along Cross Creek Bend Dr. just north of FM 1093 and are allowed to build 21 units/ac. (290 units expected)	Jan. 2019: Up to 1,500 MF units are allowed in the entire development w/ the dev. Agreement; no more than 830 units (per the dev agreement) can be built in LCISD and would be located on the site outlined in the CCR land plan on the 23.7 ac. at future Bois D'Arc Rd. and Fulshear Bend Dr.;
NEW HOUSING OCCUPANCIES:										
Jan 2019–Oct 2019	0	0	0	0	53	0	0	0	0	
Oct 2019–Oct 2020	0	0	0	0	60	20	0	0	0	
Oct 2020–Oct 2021	0	0	0	0	65	40	65	0	0	
Oct 2021–Oct 2022	0	0	45	45	75	105	110	0	0	
Oct 2022–Oct 2023	0	0	75	75	75	115	105	15	15	
Oct 2023–Oct 2024	0	0	130	130	75	165	10	55	55	
Oct 2024–Oct 2025	0	0	150	150	75	44	0	85	85	
Oct 2025–Oct 2026	0	0	85	85	75	0	0	95	95	
Oct 2026–Oct 2027	0	0	28	28	75	0	0	105	105	
Oct 2027–Oct 2028	0	0	0	0	29	0	0	115	115	
Jan 2019–Oct 2023	0	0	120	120	328	280	280	15	15	
Oct 2023–Oct 2028	0	0	393	393	329	209	10	455	455	
Jan 2019–Oct 2028	0	0	513	513	657	489	290	470	470	
Med. Household Size	2.15	x	3.15	x	1.75	3.19	2.15	2.15	2.15	

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	
Name	Lakes of Cross Creek	The Brooks	The Pond	Wren Landing	Willows I	Indigo Trail	Willows II		
Land Use	Single Family	Single Family	Single Family	Single Family	Single Family	Single Family	Single Family		
Development Phase	Existing	Existing	Existing	Developing	Developing	Developing	Planned		
Municipality	Fulshear	Fulshear	Fulshear	Fulshear	Fulshear	Fulshear	Fulshear		
	H2O	H2O	H2O	H2O	H2O	H2O	H2O	H2O	H2O
NEW HOUSING OCCUPANCIES:	3 sections = 136 lots; built out: Jan. 2018: 134 Occ'd, 0 Avail., 1 UC & 1 dev'd lots LTBO; builders: Partners in Building, Darling & Trendmaker Homes Jan. 2017: 131 Occ'd, 2 Avail., 0 UC & 3 dev'd lots LTBO; Jan. 2016: 120 Occ'd, 7 Avail., 5 UC & 4 dev'd lots LTBO; Jan. 2015: 90 Occ'd, 11 Avail., 11 UC & 24 dev'd lots LTBO; Jan. 2014: 38 Occ'd, 14 Avail., 21 UC & 63 dev'd lots LTBO;	96 lots in 1st section & 39 lots in section 2nd section; built out: Jan. 2018: 93 Occ'd, 8 Avail., 11 UC & 33 dev'd lots LTBO; builders: Perry & Chesmar Homes Jan. 2017: 16 Occ'd, 7 Avail., 19 UC & 54 dev'd lots LTBO; plans for 39 lots in 2nd section;	68 total lots; built out Jan. 2018: 62 Occ'd, 4 Avail., 2 UC & 0 dev'd lots LTBO; builders: Sitterle & Darling Homes Jan. 2017: 39 Occ'd, 5 Avail., 10 UC & 14 dev'd lots LTBO; Jan. 2016: 18 Occ'd, 6 Avail., 10 UC & 34 dev'd lots LTBO; Jan. 2015: 2 Occ'd, 8 Avail., 4 UC & 54 dev'd lots LTBO;	39 total lots; Jan. 2019: 37 Occ'd, 0 Avail., 2 UC & 0 dev'd lots LTBO; builders: Chesmar Homes	74 total TH lots; Jan. 2019: 27 Occ'd, 3 Avail., 16 UC & 28 dev'd lots LTBO; Jan. 2018: 5 Occ'd, 3 Avail., 6 UC builder: Chesmar Homes	146 total lots; Jan. 2019: 0 Occ'd, 2 Avail., 22 UC & 122 dev'd lots LTBO; builders: Perry & Chesmar Homes	Jan. 2019: 64 total TH lots planned north of current phase I		
Jan 2019–Oct 2019	0	0	0	2	32	48	0	135	
Oct 2019–Oct 2020	0	0	0	0	12	58	14	164	
Oct 2020–Oct 2021	0	0	0	0	3	40	32	245	
Oct 2021–Oct 2022	0	0	0	0	0	0	12	302	
Oct 2022–Oct 2023	0	0	0	0	0	0	6	316	
Oct 2023–Oct 2024	0	0	0	0	0	0	0	305	
Oct 2024–Oct 2025	0	0	0	0	0	0	0	204	
Oct 2025–Oct 2026	0	0	0	0	0	0	0	170	
Oct 2026–Oct 2027	0	0	0	0	0	0	0	180	
Oct 2027–Oct 2028	0	0	0	0	0	0	0	144	
Jan 2019–Oct 2023	0	0	0	2	47	146	64	1,162	
Oct 2023–Oct 2028	0	0	0	0	0	0	0	1,003	
Jan 2019–Oct 2028	0	0	0	2	47	146	64	2,165	
Med. Household Size	2.30	2.96	2.98	3.10	2.70	3.12	2.70	x	

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028
POPULATION AND SURVEY ANALYSTS



MPC			Harrison Interests		Harrison Interests Commercial/Town Center		Foster Creek Estates		Whispering Oaks			
Name			Single Family		Mixed Use		Single Family		Single Family		Single Family	
Land Use	Institutional		Probable		Probable		Existing		Developing		Probable	
Development Phase	Existing		Fulshear ETJ		Fulshear ETJ		Fort Bend County		Fort Bend County		Fort Bend County	
Municipality	H21	H21	I01	I01	I01	J01	J01	J01	J01	J01	J01	J01
NEW HOUSING OCCUPANCIES:	<p>June 2018: Enterprise Cruse Pipeline has 30 ac. Off FM 1463; Diocese of Galveston Houston has 23 ac. and First Baptist Church of Fulshear has ~30 ac. N. along FM 1093</p> <p>Jan. 2019: no new activity to discuss—several purchase attempts have not been successful but the potential for development remains strong here; Jan. 2018: The City of Fulshear is planning to annex 582.7 ac. of the Harrison Tract; the land is the northern portion of the assemblage mostly north of McKinnon Rd. and fronting FM 1093 (fut. Westpark Tollway); Jan. 2017: Harrison Interests has six large parcels of ~3,700 ac. that will have traditional single family homes; the north 1,000 ac. will likely be a town center; in 2014, Johnson Development had portion under contract, and still interested, along w/~4 other devers; (ownership has been 50% uncle & 50% nephew) City of Fulshear states both Harrison &/or Foster Farms could sell to New Quest, Johnson Dev., Newland, and one other dever; (another City official observed that livestock-removed from ~5,000 ac. in this PU, perhaps indicating their interest in selling all of the Foster/Harrison assemblage)</p> <p>Jan. 2018: The north 1,000 ac. of the Harrison tract will likely dev. as comm. with MF/retail components; no plans or owner yet, but expect upwards of 3,000 MF or TH units to dev. over the next few decades;</p> <p>basically built-out</p> <p>76 total lots just W. off FM 359 & N. of Bella Vista subdivision Jan 2019: 55 Occ'd, 0 Avail., 0 UC & 21 dev'd lots LTBO; Jan 2018: 52 Occ'd, 0 Avail., 1 UC & 23 dev'd lots LTBO; builder: Sierra Classic Homes Jan 2017: 46 Occ'd, 1 Avail., 4 UC & 25 dev'd lots LTBO; builders: Sierra Homes & WestKey Homes Jan 2016: 40 Occ'd, 1 Avail., 4 UC & 31 dev'd lots LTBO; Jan 2015: 23 Occ'd, 4 Avail., 8 UC & 41 dev'd lots LTBO; Jan 2014: 15 Occ'd, 3 Avail., 4 UC & 54 dev'd lots LTBO; Jan 2014: David Powers now a new builder – purchased lots in new section; Jan 2013: 7 Occ'd, 0 Avail., 6 UC & 63 dev'd lots LTBO;</p> <p>Jan. 2019: Somerville Acres Inc. has 137.6, 8.2, 167.2, & 31.2 ac.; Western Gulf Inv. has 40 ac.; Joe Coleman has 55.8 ac.; Renee Imports has 50.7 & 16 ac.; McMillan Inv. Ltd. has 162.2 ac.; (this land is very low, so expect almost all low density SF and very little or no commercial)</p>											
Jan 2019–Oct 2019	0	0	0	0	0	0	0	3	0	3		
Oct 2019–Oct 2020	0	0	0	0	0	1	3	0	3	4		
Oct 2020–Oct 2021	0	0	0	0	0	0	3	3	5	6		
Oct 2021–Oct 2022	0	0	5	5	10	0	2	5	7			
Oct 2022–Oct 2023	0	0	30	40	70	1	2	8	11			
Oct 2023–Oct 2024	0	0	70	70	140	1	2	9	12			
Oct 2024–Oct 2025	0	0	130	100	230	0	1	11	12			
Oct 2025–Oct 2026	0	0	170	120	290	0	1	12	13			
Oct 2026–Oct 2027	0	0	210	140	350	0	1	15	16			
Oct 2027–Oct 2028	0	0	240	140	380	0	1	15	16			
Jan 2019–Oct 2023	0	0	35	45	80	2	13	16	31			
Oct 2023–Oct 2028	0	0	820	570	1,390	1	6	62	69			
Jan 2019–Oct 2028	0	0	855	615	1,470	3	19	78	100			
Med. Household Size	2.15	X	3.20	2.25	X	2.95	3.00	3.00	X			

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC	Bella Vista	Foster Island Estates	Karaugh	Colony West	Foster Crossing	Foster Farms	LaPrada Landing	
Name	Bella Vista	Foster Island Estates	Karaugh	Colony West	Foster Crossing	Foster Farms Inc. Tract	LaPrada Landing	
Land Use	Single Family	Single Family	Single Family	Single Family	Single Family	Single Family	Single Family	
Development Phase	Existing	Existing	Developing	Existing	Developing	Probable	Developing	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	
	J02	J02	J02	J02	J03	J03	K01	
	J02	J02	J02	J02	J03	J03	K01	
NEW HOUSING OCCUPANCIES:	built out (and parcel to the S. of Karaugh should dev. residentially) off E. Winner Foster	8 large estate lots built out	South of Bella Vista subd. & off of Winner Foster Rd. Jan. 2019: 24 Occ'd, 0 Avail., 0 UC & 7 dev'd lots LTBO; Jan. 2018: 22 Occ'd, 0 Avail., 0 UC & 9 dev'd lots LTBO; Jan. 2017: 22 Occ'd, 0 Avail., 0 UC & 9 dev'd lots LTBO; Jan. 2016: 21 Occ'd, 0 Avail., 1 UC & 9 dev'd lots LTBO; Jan. 2015: 21 Occ'd, 0 Avail., 0 UC & 10 dev'd lots LTBO; Jan. 2014: 21 Occ'd, 0 Avail., 0 UC & 10 dev'd lots LTBO;	built out	W. of FM 359 & N. of FM 723 - \$300-\$500 Jan. 2019: 27 Occ'd, 0 Avail., 0 UC & 18 dev'd lots LTBO; Jan. 2018: 26 Occ'd, 0 Avail., 0 UC & 19 dev'd lots LTBO; Jan. 2017: 25 Occ'd, 0 Avail., 1 UC & 19 dev'd lots LTBO; Jan. 2016: 22 Occ'd, 0 Avail., 3 UC & 20 dev'd lots LTBO; Jan. 2015: 19 Occ'd, 0 Avail., 5 UC & 21 dev'd lots LTBO; Jan. 2014: 18 Occ'd, 0 Avail., 0 UC & 27 dev'd lots LTBO;	Jan. 2019: Foster Farms Inc. has ~2,282.6 & ~2,344 ac.; this tract will have a levee; LID #21 is being created and will have a levee approx. 2,000-ft, setback from the floodway; PASA estimates 3,150 developable acres will remain after levee creation; 2018: have ~2,626 ac. in PU, & have MUDs, and are working on a Foster LID (Levee Improvement Dist. s/Angie Lutz as attorney; City est's ~6,000 ac. lot & est's 21,260 pop., so min. of 7,900 SF; and max. of 10,800 SF and MF (PASA), the latter limited due to high % ft. plain/floodway & need for detention/channelization	Jan. 2019: no activity currently; Jan. 2018: Highland Management Inc. is marketing this large-acreage community of 9 lots; two lots have sold and each lot is between 60 and 105 acres.; this development will have very little impact on LCISD schools;	
Jan 2019–Oct 2019	0	0	0	0	0	1	0	
Oct 2019–Oct 2020	0	0	1	1	0	2	1	
Oct 2020–Oct 2021	0	0	1	1	0	1	0	
Oct 2021–Oct 2022	0	0	0	0	0	1	0	
Oct 2022–Oct 2023	0	0	1	1	0	2	1	
Oct 2023–Oct 2024	0	0	0	0	0	0	10	
Oct 2024–Oct 2025	0	0	1	1	0	1	45	
Oct 2025–Oct 2026	0	0	1	1	0	1	75	
Oct 2026–Oct 2027	0	0	0	0	0	1	125	
Oct 2027–Oct 2028	0	0	0	0	0	1	150	
Jan 2019–Oct 2023	0	0	3	3	0	7	170	
Oct 2023–Oct 2028	0	0	2	2	0	4	10	
Jan 2019–Oct 2028	0	0	5	5	0	11	565	
Med. Household Size	3.00	3.00	3.00	x	3.00	3.00	x	3.20
								2.70

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC			Fulbrook		Fulbrook at Fulshear Creek	
Name			Fulbrook		Fulbrook at Fulshear Creek	
Land Use	Single Family		Single Family		Single Family	
Development Phase	Probable		Developing		Developing	
Municipality	Fulshear ETJ		Fulshear ETJ		Fulshear	
	K01	K01	L01	L01	L02	L02
NEW HOUSING OCCUPANCIES:	<p>Jan. 2019: Highland Management Inc. has ~690 ac. now set up as MUD 6 w/ City; MUD 6 may join LID 21 and have lots of 5-20 acres in size; South of Winner Foster Rd.; Multiple Owners have 884.9 & 50.6 ac.; Jeffrey Chadma has 324.1 ac.; Highland recently sold a 70 ac. parcel to Rio Brazos Land Co. ~75% in floodplain or floodway;</p>		<p>Sections: Fulbrook Creeks, Churchill, The Commons, Woodshore, Oxbow Lake, Pecan Reserve & River Cliff Jan. 2019: 270 Occ'd, 2 Avail., 13 UC & 160 dev'd lots LTBO; Jan. 2018: 270 Occ'd, 1 Avail., 7 UC & 167 dev'd lots LTBO; builders: Fairmont Custom Homes, Arrow Custom Homes, Ron Carroll Homes & Daybreak Homes 2017: 264 Occ'd, 1 Avail., 6 UC & 125 dev'd lots LTBO; developer has a concept plan for 49 future lots; Jan. 2016: 260 Occ'd, 1 Avail., 8 UC & 99 dev'd lots LTBO; developer has a concept plan for 77 future lots; Jan. 2015: 256 Occ'd, 1 Avail., 10 UC & 122 dev'd lots LTBO; developer has a concept plan for 87 future lots;</p>		<p>In 2018 a new general plan was approved increasing the total lot count from 984 to 1,171; formerly Fulshear Creek Crossing; Fulshear Trace is being built through here; new plats are being approved south of Bessies Creek; Sec. 5 platted in Aug 2018 for 97 lots & Sec. 13 platted in June 2018 for 61 lots; Jan. 2019: 342 Occ'd, 16 Avail., 21 UC & 114 dev'd lots LTBO; Jan. 2018: 291 Occ'd, 15 Avail., 12 UC & 136 dev'd lots LTBO; developer has plans for 525 future lots builders: Coventry, Newmark, Highland, J. Patrick & CalAtlantic Homes; Jan. 2017: 227 Occ'd, 28 Avail., 15 UC & 41 dev'd lots LTBO; has plans for 787 future lots - constructing bridge-that will allow a road through the abutting property; Jan. 2016: 164 Occ'd, 30 Avail., 21 UC & 96 dev'd lots LTBO; has plans for 787 future lots - constructing bridge-that will allow a road through the abutting property;</p>	
Jan 2019–Oct 2019	0	0	8	8	54	54
Oct 2019–Oct 2020	0	1	7	7	65	65
Oct 2020–Oct 2021	0	0	6	6	70	70
Oct 2021–Oct 2022	0	0	5	5	75	75
Oct 2022–Oct 2023	0	11	5	5	85	85
Oct 2023–Oct 2024	5	50	4	4	90	90
Oct 2024–Oct 2025	8	84	4	4	90	90
Oct 2025–Oct 2026	11	136	4	4	90	90
Oct 2026–Oct 2027	14	165	3	3	90	90
Oct 2027–Oct 2028	14	185	3	3	90	90
Jan 2019–Oct 2023	0	12	31	31	349	349
Oct 2023–Oct 2028	52	620	18	18	450	450
Jan 2019–Oct 2028	52	632	49	49	799	799
Med. Household Size	3.14	X	2.86	X	3.26	X

PROJECTED NEW HOUSING OCCUPANCIES, 2019-2028
POPULATION AND SURVEY ANALYSTS



MPC	Name	Land Use	Development Phase	Municipality																								
	Fulshear Run	Single Family	Developing	Fulshear	Fulshear Run	Multi-Family	Probable	Fulshear	"Highland Management 227 ac."	Single Family	Probable	Fulshear	"Highland Management MUD 5"	Single Family	Probable	Fulshear	Rand and Penn I	Existing	Fulshear	Rand and Penn II	Existing	Fulshear	"Harrison Interests"	Single Family	Probable	Fulshear ETJ		
					L03	L03	L03	L03	L04	L04	L04	L04	L04	L04	L04	L04	L04	L04	L04	L04	L04	L04	L05	L05	L05	L05	L05	
	Fulshear Run with 212 SF (&~30 urban residential lots - see next col.) Jan. 2019: 34 Occ'd, 4 Avail., 18 UC & 18 dev'd lots LTBO; Jan. 2018: 15 Occ'd, 4 Avail., 3 UC & 50 dev'd lots LTBO; has concept plans for 140 future lots on the remaining land; builders: Trendmaker Homes Jan. 2017: 1 Occ'd, 10 Avail., 2 UC & 59 dev'd lots LTBO; has concept plans for 140 future lots on the remaining land; 2016: expect low student/home ratios; DHK (Knopka) bought the Smarts parcels off Bois d'Arc; (John & Francis Smart's ~135 ac.) acquired Alan Meinen's & Robert Kipp & other long-time owners; these tracts will not be able to use the old Fulshear Creek Crossing MUD (now Fulbrook at Fulshear Creek) Knopka could assemble ~350 ac.;				Jan. 2019: Dev. Agreement allows 400 MF units; the MF site planned will likely have 200 or fewer units; Doug Knopka was not be able to use old Fulshear Creek Crossing MUD (which is Fulbrook at Fulshear Creek) Knopka has assembled ~263 ac. (as of late 2015) (2016: City zoning shows the Fulshear run urban residential as part of commercial land use, and it could still evolve as conventional MF or urban living MF)				Jan. 2019: Highland Management Inc. has 227 ac. now set up as MUD 4 that is highly likely to be developed as traditional suburban single family with ~2.4 homes per acre; very little flood plain;				Jan. 2019: Highland Management Inc. has ~600 ac. now set up as MUD 5 and partially out of the City Limits that is planned for larger lots of ~1 ac. in size; very little flood plain so expect 450-650 homes unless plans change;				built out				built out				Jan. 2019: Harrison Interests Ltd. has approximately 93+171 ac. S. of Fulbrook at Fulshear Creek; the City wants this area reserved for 1 acre lots so there could be 525 lots here; no MUDs are planned here yet;			
	NEW HOUSING OCCUPANCIES:																											
	Jan 2019-Oct 2019	20			0	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Oct 2019-Oct 2020	26			0	26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Oct 2020-Oct 2021	27			0	27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Oct 2021-Oct 2022	29			0	29	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	
	Oct 2022-Oct 2023	30			50	80	10	7	0	0	0	0	0	0	0	0	0	0	0	0	0	17	0	0	0	0	0	
	Oct 2023-Oct 2024	26			50	76	25	14	0	0	0	0	0	0	0	0	0	0	0	0	0	39	0	0	0	0	0	
	Oct 2024-Oct 2025	18			50	68	40	16	0	0	0	0	0	0	0	0	0	0	0	0	0	56	5	0	0	0	0	
	Oct 2025-Oct 2026	4			25	29	45	18	0	0	0	0	0	0	0	0	0	0	0	0	0	63	5	0	0	0	0	
	Oct 2026-Oct 2027	0			25	25	50	21	0	0	0	0	0	0	0	0	0	0	0	0	0	71	10	0	0	0	0	
	Oct 2027-Oct 2028	0			25	25	55	21	0	0	0	0	0	0	0	0	0	0	0	0	0	76	10	0	0	0	0	
	Jan 2019-Oct 2023	132			50	182	10	9	0	0	0	0	0	0	0	0	0	0	0	0	0	19	0	0	0	0	0	
	Oct 2023-Oct 2028	48			175	223	215	90	0	0	0	0	0	0	0	0	0	0	0	0	0	305	30	0	0	0	0	
	Jan 2019-Oct 2028	180			225	405	225	99	0	0	0	0	0	0	0	0	0	0	0	0	0	324	30	0	0	0	0	
	Med. Household Size	3.35			1.60	x	3.10	2.65	2.65	2.65	2.65	2.65	2.65	2.65	2.65	2.65	2.65	2.65	2.65	2.65	x	3.00						

PROJECTED NEW HOUSING OCCUPANCIES, 2019–2028 POPULATION AND SURVEY ANALYSTS



MPC							Total Projected New Housing Occupancies, 2019–2028					
Name			Fulbrook									
Land Use	Single Family		Single Family		Undeveloped							
Development Phase	Probable		Developing		Vacant							
Municipality	Fulshear ETJ		Fort Bend County		Fulshear ETJ							
	L05	L05	L06	L06	M01	M01						
NEW HOUSING OCCUPANCIES:												
Jan 2019–Oct 2019	0	0	4	4	0	0	878	80	0	83	0	1,041
Oct 2019–Oct 2020	0	0	4	4	0	0	1,083	180	0	83	0	1,346
Oct 2020–Oct 2021	0	0	5	5	0	0	1,270	155	25	75	0	1,525
Oct 2021–Oct 2022	5	5	5	5	0	0	1,611	140	30	75	0	1,856
Oct 2022–Oct 2023	7	7	5	5	0	0	1,933	240	85	75	0	2,333
Oct 2023–Oct 2024	11	11	6	6	0	0	2,273	235	145	75	0	2,728
Oct 2024–Oct 2025	15	20	6	6	0	0	2,367	320	175	75	0	2,937
Oct 2025–Oct 2026	15	20	6	6	0	0	2,433	335	195	75	0	3,038
Oct 2026–Oct 2027	16	26	6	6	0	0	2,501	375	215	75	0	3,166
Oct 2027–Oct 2028	16	26	6	6	0	0	2,449	400	215	29	0	3,093
Jan 2019–Oct 2023	12	12	23	23	0	0	6,775	795	140	391	0	8,101
Oct 2023–Oct 2028	73	103	30	30	0	0	12,023	1,665	945	329	0	14,962
Jan 2019–Oct 2028	85	115	53	53	0	0	18,798	2,460	1,085	720	0	23,063
Med. Household Size	2.90	x	2.70	x	2.80	x						

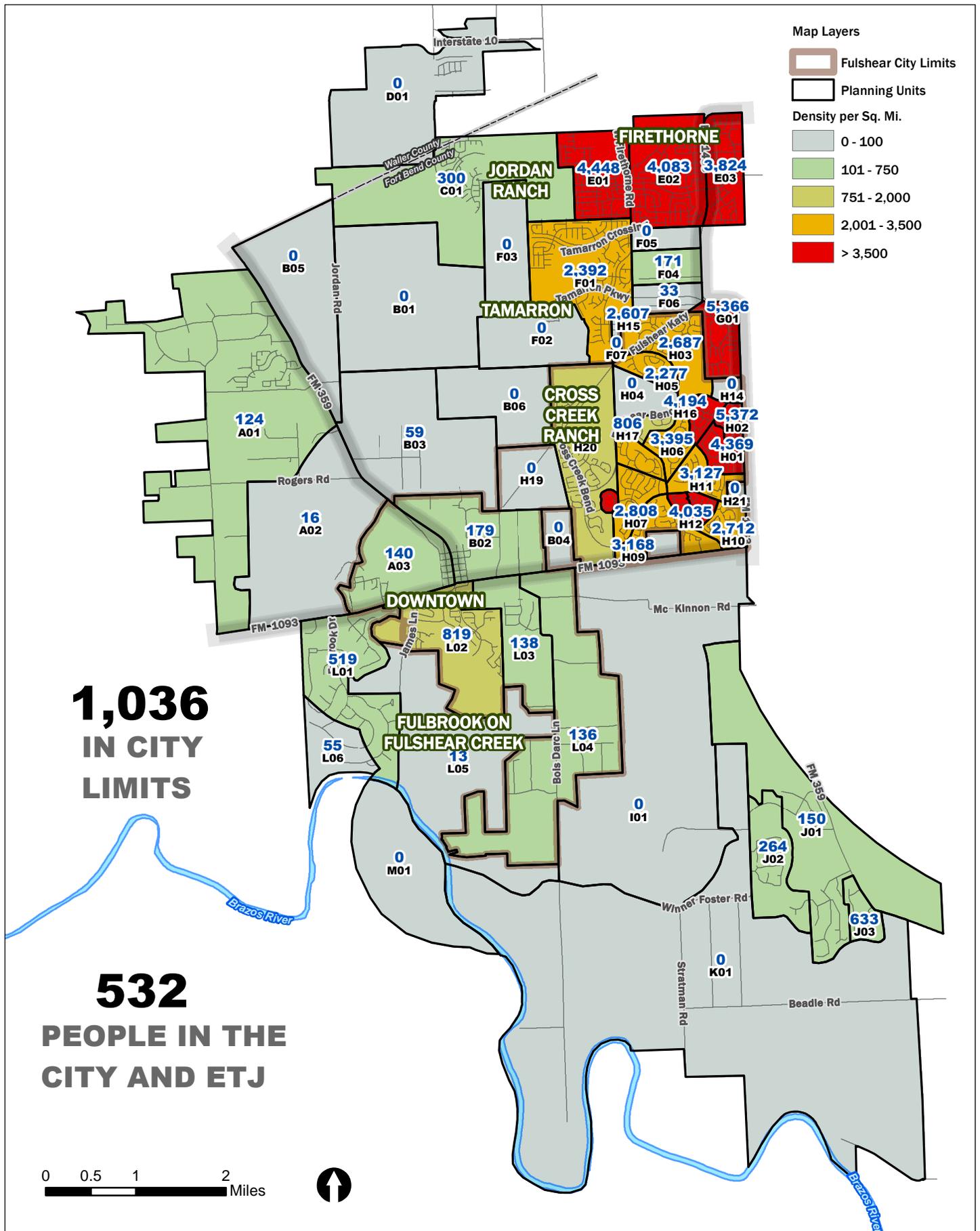
Estimated Household Size by Planning Unit



Planning Unit	Total Housing Units 2018	Estimated Housing Units Occupied 2018	Estimated 2018 Population	Estimated Average Household Size
A01	251	241	545	2.26
A02	17	16	35	2.13
A03	63	60	131	2.16
B02	71	68	185	2.72
B03	48	46	115	2.50
C01	224	215	667	3.10
E01	999	959	2,992	3.12
E02	1,330	1,277	4,226	3.31
E03	633	608	1,987	3.27
F01	1,048	1,006	3,089	3.07
F04	19	18	50	2.74
F06	3	3	8	2.67
G01	574	551	1,863	3.38
H01	260	250	844	3.38
H02	173	166	561	3.38
H03	345	331	1,119	3.38
H05	124	119	404	3.39
H06	224	215	729	3.39
H07	239	229	778	3.39
H08	111	107	361	3.39
H09	336	323	1,093	3.39
H10	160	154	521	3.39
H11	239	229	778	3.39
H12	134	129	436	3.39
H13	50	48	163	3.39
H15	148	142	448	3.15
H16	186	179	598	3.35
H17	32	31	97	3.15
H18	67	64	180	2.80
H20	440	422	1,132	2.68
J01	134	129	382	2.97
J02	62	60	173	2.90
J03	46	44	128	2.90
L01	258	248	644	2.60
L02	335	322	1,023	3.18
L03	34	33	106	3.25
L04	133	128	338	2.65
L05	11	11	32	3.00
L06	10	10	25	2.60
Total	9,571	9,188	28,986	
Estimated Persons per Physical Housing Unit				3.03
Weighted Mean Household Size				3.15

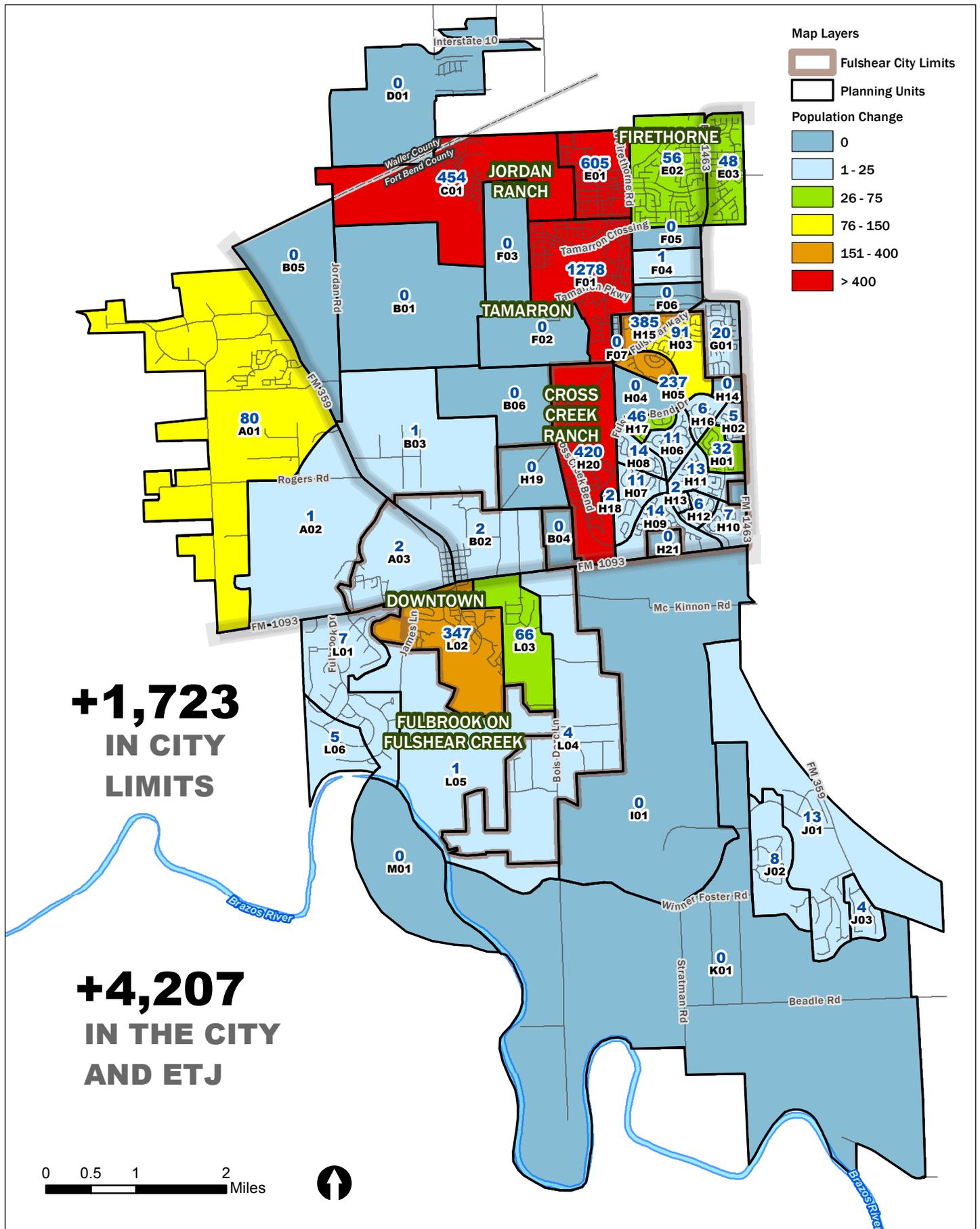
Population Density by Planning Unit

October 2018



Population Change by Planning Unit

Estimated October 2017 to October 2018



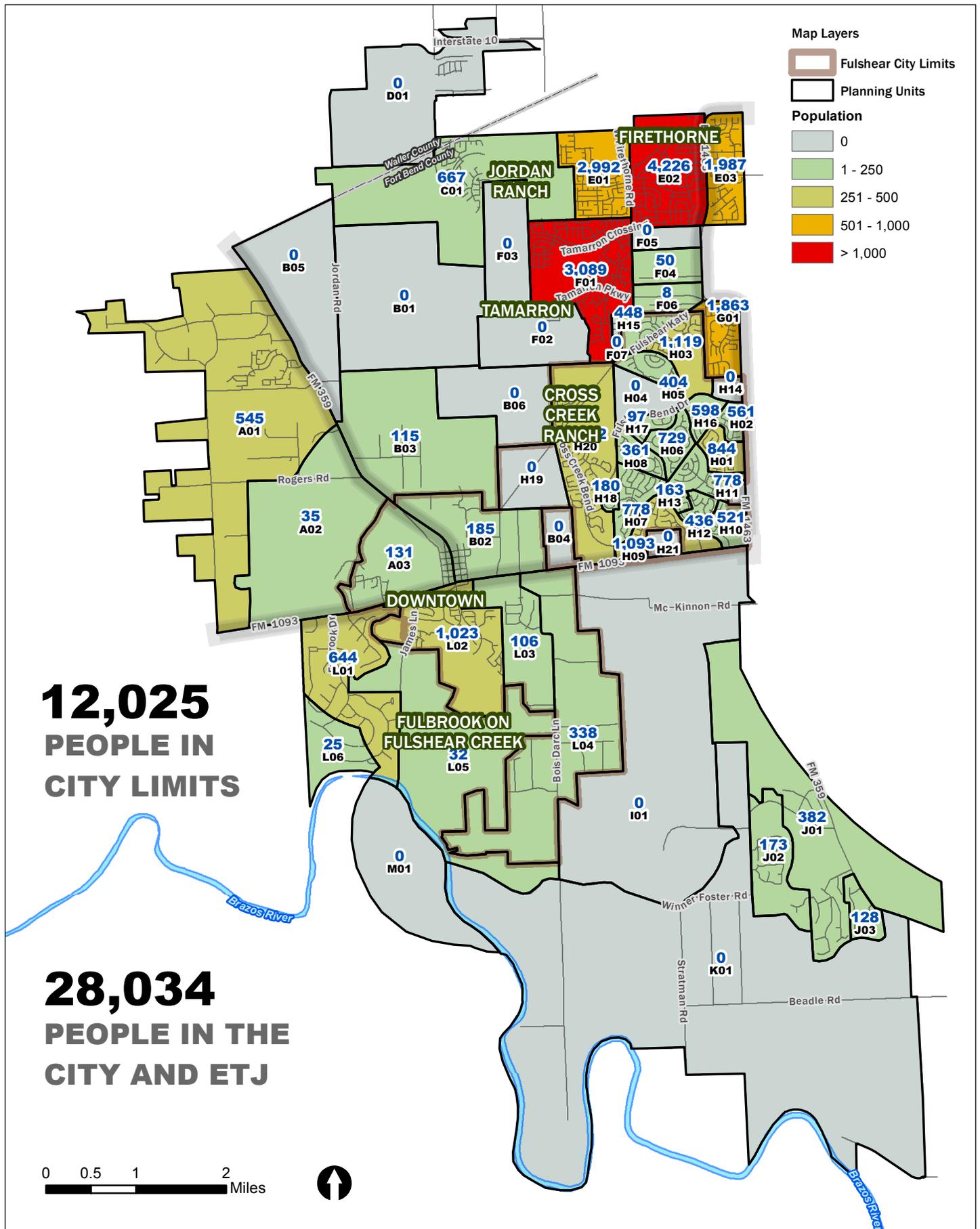
PROJECTED POPULATION BY YEAR
FULSHEAR JURISDICTION AND SINGLE MEMBER DISTRICTS



Area	Oct. 2018	Oct. 2019	Oct. 2020	Oct. 2021	Oct. 2022	Oct. 2023	Oct. 2024	Oct. 2025	Oct. 2026	Oct. 2027	Oct. 2028
City	12,025	14,141	16,187	18,040	19,953	22,022	24,192	26,372	27,893	29,306	30,622
ETJ	16,009	18,271	20,184	22,652	25,852	29,811	34,579	39,365	45,191	51,367	57,520
City + ETJ	28,034	32,412	36,371	40,692	45,805	51,833	58,771	65,737	73,084	80,673	88,142
Outside ETJ	952	1,141	1,359	1,689	2,189	2,947	3,952	4,957	6,192	7,451	8,595
SINGLE MEMBER DISTRICTS											
District 1	2,915	3,648	4,476	5,534	6,973	8,740	10,774	12,814	14,235	15,538	16,738
District 2	2,145	2,393	2,727	3,017	3,329	3,580	3,656	3,733	3,744	3,762	3,785
District 3	3,130	4,027	4,842	5,276	5,366	5,342	5,340	5,338	5,362	5,388	5,414
District 4	1,777	1,884	1,918	1,954	1,990	2,028	2,060	2,093	2,126	2,159	2,193
District 5	2,058	2,189	2,224	2,259	2,295	2,332	2,362	2,394	2,426	2,459	2,492

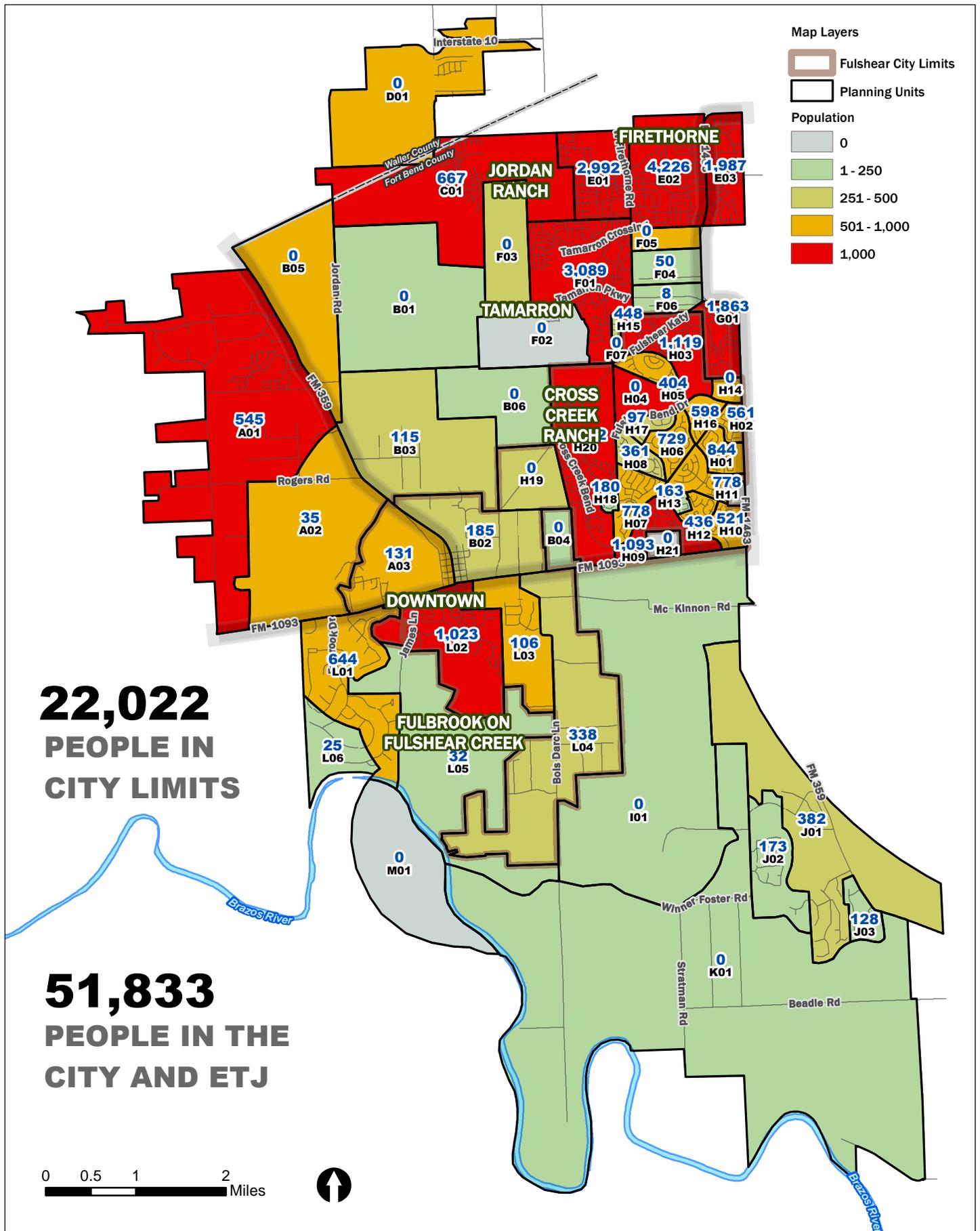
Population Estimates by Planning Unit

October 2018



Projected Population in 2023

by Planning Unit



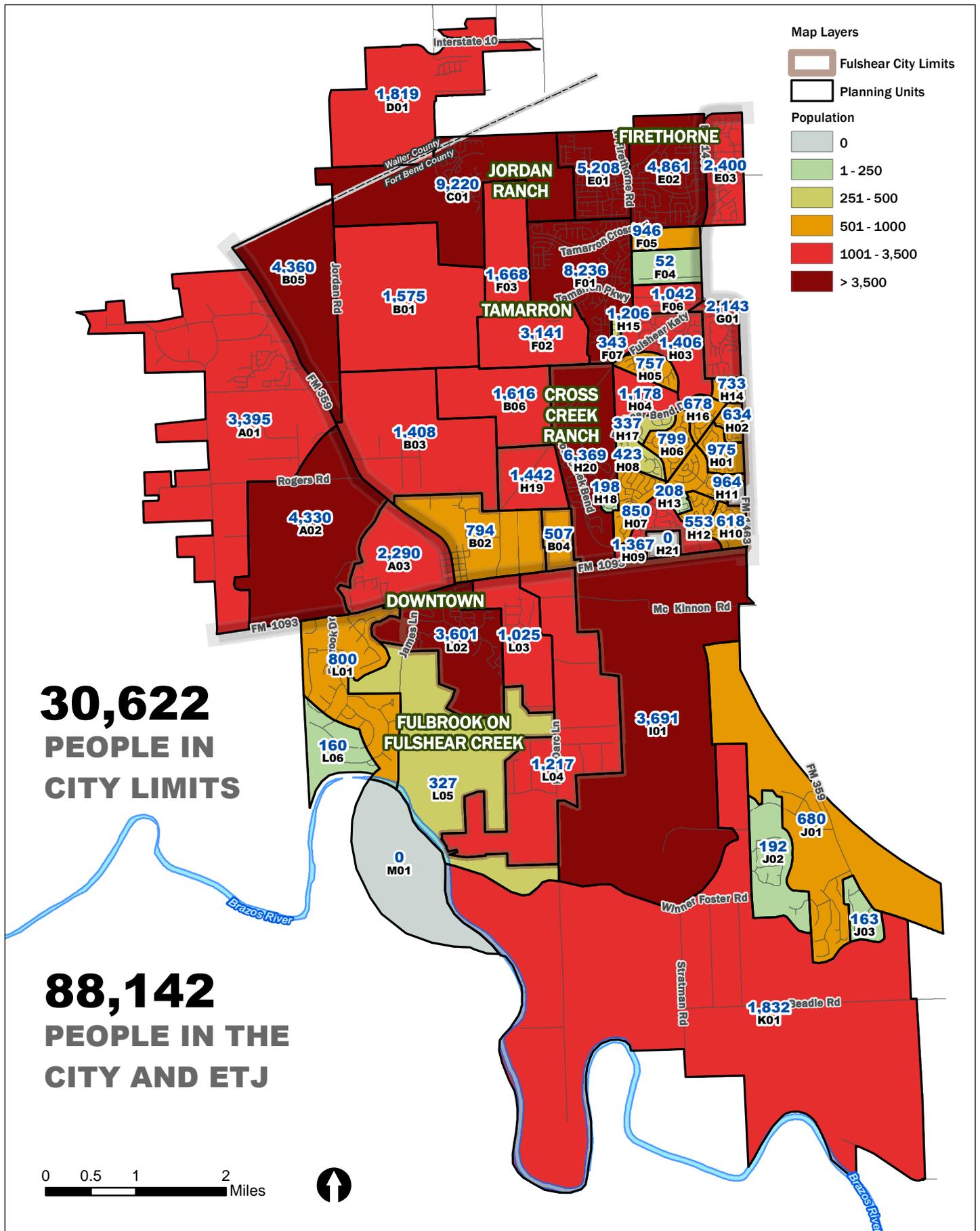
22,022
PEOPLE IN
CITY LIMITS

51,833
PEOPLE IN THE
CITY AND ETJ

0 0.5 1 2 Miles

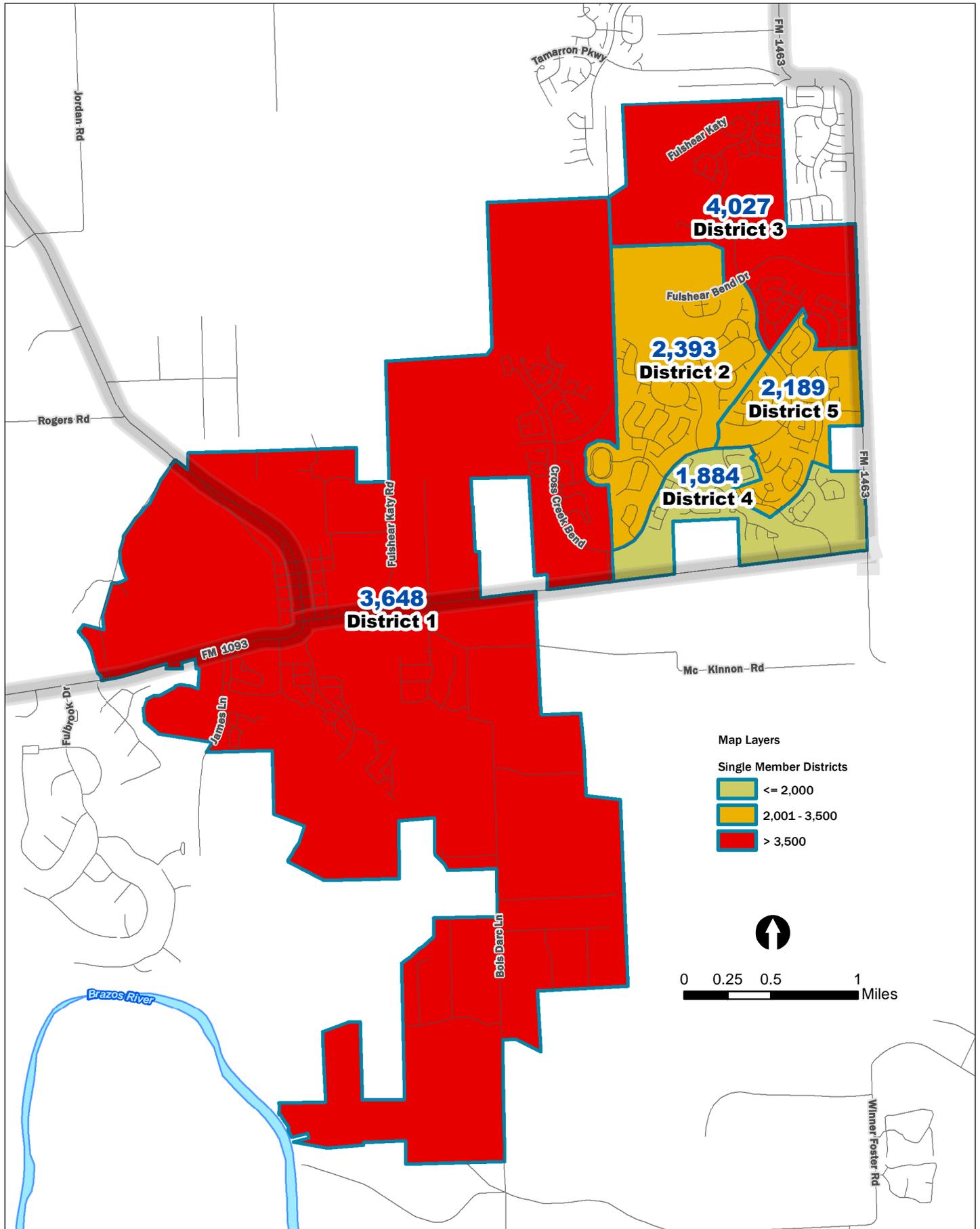
Projected Population in 2028

by Planning Unit



Population Projections 2019

Single Member Districts



**PROJECTED POPULATION BY YEAR
BY PLANNING UNIT
FULSHEAR CITY LIMITS AND ETJ**



Planning Unit	District	Area	Oct. 2018	Oct. 2019	Oct. 2020	Oct. 2021	Oct. 2022	Oct. 2023	Oct. 2024	Oct. 2025	Oct. 2026	Oct. 2027	Oct. 2028
A01		X	545	697	893	1,114	1,393	1,702	2,054	2,406	2,821	3,184	3,395
A02		ETJ	35	36	58	235	557	984	1,503	2,022	2,752	3,524	4,330
A03	1	CL	131	170	292	442	665	916	1,165	1,414	1,693	1,988	2,290
B01		ETJ	0	0	0	0	0	31	155	279	642	1,090	1,575
B02	1	CL	185	193	193	211	252	326	405	484	580	684	794
B03		ETJ	115	120	120	122	202	325	479	633	858	1,111	1,408
B04		ETJ	0	0	0	0	0	28	97	166	273	391	507
B05		X	0	0	0	79	267	673	1,277	1,881	2,650	3,486	4,360
B06		ETJ	0	0	0	0	48	158	345	532	884	1,245	1,616
C01		ETJ	667	1,148	1,810	2,555	3,428	4,458	5,542	6,631	7,573	8,505	9,220
D01		ETJ	0	95	256	424	611	834	1,092	1,350	1,618	1,750	1,819
E01		ETJ	2,992	3,212	3,333	3,588	3,987	4,387	4,662	4,943	5,023	5,111	5,208
E02		ETJ	4,226	4,445	4,489	4,534	4,579	4,625	4,671	4,718	4,765	4,813	4,861
E03		ETJ	1,987	2,100	2,132	2,164	2,196	2,229	2,262	2,296	2,330	2,365	2,400
F01		ETJ	3,089	3,997	4,632	5,309	5,991	6,789	7,470	8,155	8,200	8,211	8,236
F02		ETJ	0	0	0	0	0	0	222	444	1,330	2,245	3,141
F03		ETJ	0	0	0	16	127	299	515	731	1,047	1,359	1,668
F04		ETJ	50	52	52	52	52	52	52	52	52	52	52
F05		ETJ	0	22	132	272	457	631	802	973	960	951	946
F06		ETJ	8	8	8	56	103	188	329	470	619	832	1,042
F07		ETJ	0	35	110	231	343	342	339	336	337	340	343
G01		ETJ	1,863	1,959	1,979	1,999	2,019	2,039	2,059	2,080	2,101	2,122	2,143
H01	5	CL	844	900	909	918	927	936	943	951	959	967	975
H02	3	CL	561	590	596	602	608	614	618	622	626	630	634
H03	3	CL	1,119	1,246	1,318	1,362	1,372	1,375	1,380	1,385	1,392	1,399	1,406
H04	2	CL	0	7	232	486	786	1,032	1,098	1,165	1,163	1,168	1,178
H05	3	CL	404	644	747	757	750	743	744	745	749	753	757
H06	2	CL	729	763	767	771	775	779	783	787	791	795	799
H07	2	CL	778	814	818	822	826	830	834	838	842	846	850
H08	2	CL	361	398	410	411	412	413	415	417	419	421	423
H09	4	CL	1,093	1,161	1,184	1,208	1,232	1,257	1,278	1,300	1,322	1,344	1,367
H10	4	CL	521	550	558	566	574	583	590	597	604	611	618
H11	5	CL	778	826	843	860	877	895	908	922	936	950	964
H12	5	CL	436	463	472	481	491	501	511	521	531	542	553
H13	4	CL	163	173	176	180	184	188	192	196	200	204	208
H14	3	CL	0	169	547	727	776	760	747	734	733	733	733
H15	3	CL	448	749	999	1,187	1,213	1,197	1,193	1,189	1,194	1,200	1,206
H16	3	CL	598	629	635	641	647	653	658	663	668	673	678
H17	2	CL	97	222	310	336	338	333	332	331	333	335	337
H18	2	CL	180	189	190	191	192	193	194	195	196	197	198
H19	1	CL	0	0	0	0	140	371	769	1,167	1,407	1,467	1,442
H20	1	CL	1,132	1,511	1,920	2,499	3,200	3,923	4,681	5,443	5,747	6,082	6,369
H21		ETJ	0	0	0	0	0	0	0	0	0	0	0
I01		ETJ	0	0	0	0	27	211	584	957	1,738	2,675	3,691
J01		X	382	407	419	436	456	487	521	555	591	636	680
J02		ETJ	173	180	183	186	186	189	189	189	192	192	192
J03		ETJ	128	136	142	145	148	154	154	154	157	160	163
K01		ETJ	0	0	3	3	3	37	194	351	772	1,275	1,832
L01		ETJ	644	693	712	728	741	754	764	774	784	792	800
L02	1	CL	1,023	1,245	1,457	1,682	1,920	2,187	2,469	2,753	3,035	3,317	3,601
L03	1	CL	106	177	262	348	439	611	767	923	964	993	1,025
L04	1	CL	338	352	352	352	357	406	518	630	809	1,007	1,217
L05		ETJ	32	33	33	33	47	67	98	129	184	256	327
L06		X	25	37	47	60	73	85	100	115	130	145	160
M01		ETJ	0	0	0	0	0	0	0	0	0	0	0

City of Fulshear Population Growth Scenarios, City Limits and ETJ

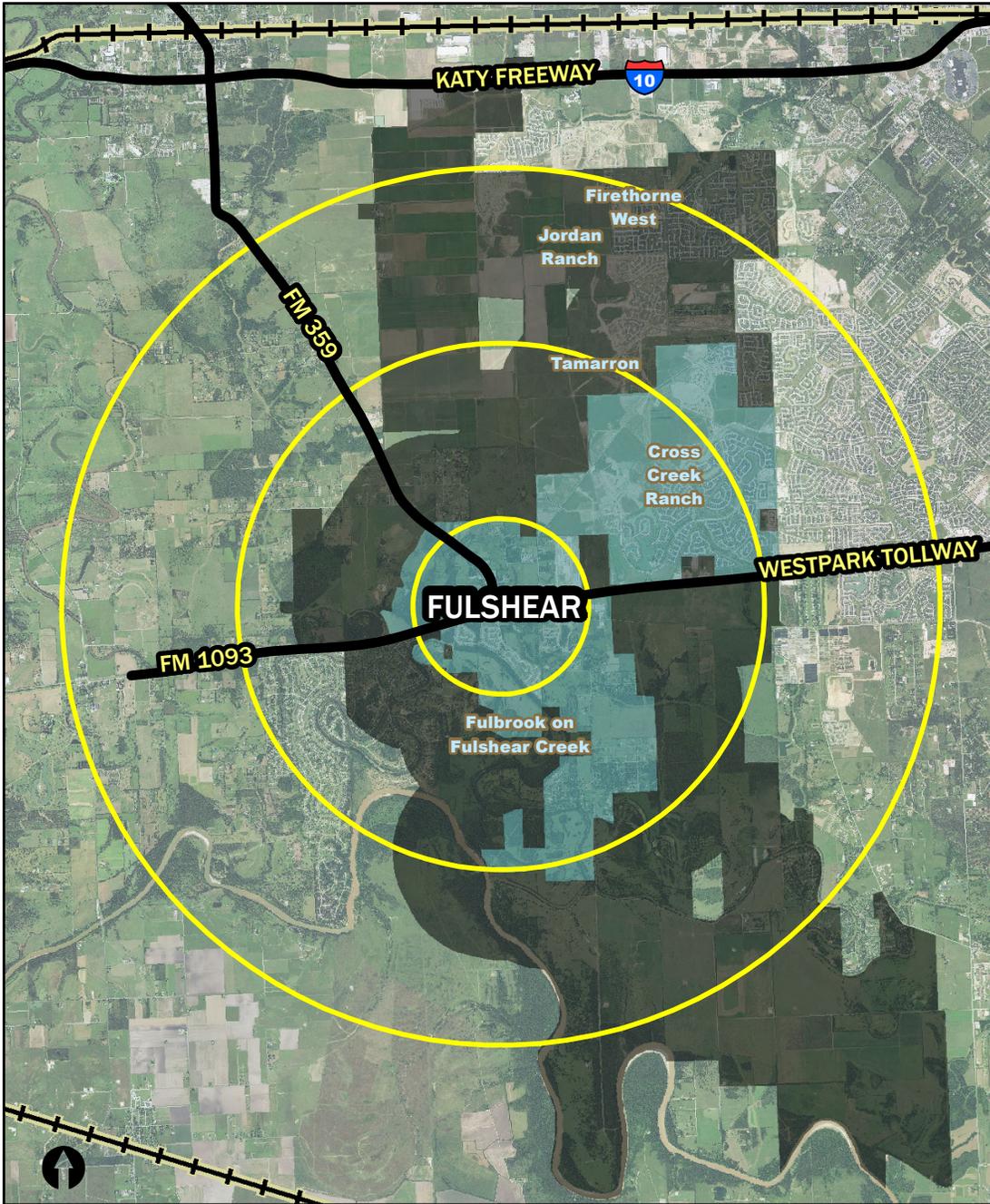


		2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
CITY LIMITS	Low										
	Population	14,056	16,020	17,762	19,522	21,301	23,102	24,868	26,070	27,144	28,131
	% Growth	0.17	0.14	0.11	0.10	0.09	0.08	0.08	0.05	0.04	0.04
	Growth	2,031	1,964	1,742	1,760	1,779	1,801	1,766	1,202	1,074	987
	Moderate										
	Population	14,141	16,187	18,040	19,953	22,022	24,192	26,372	27,893	29,306	30,622
	% Growth	0.18	0.14	0.11	0.11	0.10	0.10	0.09	0.06	0.05	0.04
	Growth	2,116	2,046	1,853	1,913	2,069	2,170	2,180	1,521	1,413	1,316
	High										
	Population	14,204	16,332	18,278	20,306	22,520	24,853	27,207	28,865	30,412	31,860
	% Growth	0.18	0.15	0.12	0.11	0.11	0.10	0.09	0.06	0.05	0.05
	Growth	2,179	2,128	1,946	2,028	2,214	2,333	2,354	1,658	1,547	1,448

		2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
ETJ	Low										
	Population	18,203	20,039	22,260	24,948	28,036	31,469	34,580	38,076	41,535	44,796
	% Growth	0.14	0.10	0.11	0.12	0.12	0.12	0.10	0.10	0.09	0.08
	Growth	2,194	1,836	2,221	2,688	3,088	3,433	3,111	3,496	3,459	3,261
	Moderate										
	Population	18,271	20,184	22,652	25,852	29,811	34,579	39,365	45,191	51,367	57,520
	% Growth	0.14	0.10	0.12	0.14	0.15	0.16	0.14	0.15	0.14	0.12
	Growth	2,262	1,913	2,468	3,200	3,959	4,768	4,786	5,826	6,176	6,153
	High										
	Population	18,339	20,329	22,920	26,312	30,548	35,674	40,843	47,193	53,956	60,724
	% Growth	0.15	0.11	0.13	0.15	0.16	0.17	0.14	0.16	0.14	0.13
	Growth	2,330	1,990	2,591	3,392	4,236	5,126	5,169	6,350	6,763	6,768

Fulshear Demographics

Downtown Fulshear Trade Area



City of Fulshear Demographic Profile

Age	
Under 5 years	9.2%
5 to 17 years	25.5%
18 to 24 years	6.7%
25 to 34 years	9.9%
35 to 54 years	33.9%
55 to 74 years	13.3%
75 years and over	1.6%

Population 25 and Over: Bachelor's Degree or Higher	64.2%
Owner-Occupied Housing	98.2%
Three or More Vehicles in Household	34.7%
Median Housing Value	\$415,900
Unemployment Rate	3.9%
Mean Travel Time to Work (Minutes)	40
Median Household Income	\$174,194

Source: U.S. Census Bureau, 2017 American Community Survey, 5-Year Estimates



Trade Area Population

	2018 Estimate	2020 Projected	2023 Projected	2028 Projected
1-mile	1,445	2,204	4,040	7,710
3-mile	10,668	13,070	19,943	41,696
5-mile	62,081	70,784	88,665	130,702

- 1-, 3-, and 5-Miles
- Fulshear, City Limit
- Fulshear, ETJ
- Railroads