

AGENDA MEMO
BUSINESS OF THE CITY COUNCIL
CITY OF FULSHEAR, TEXAS

AGENDA OF:	July 17, 2018	AGENDA ITEMS:	
DATE SUBMITTED:	July 12, 2018	DEPARTMENT	Economic Development
PREPARED BY:	Angela Fritz, Economic Development Director	PRESENTER:	Same
SUBJECTS:	Fulshear 2018 Demographic Update		
ATTACHMENTS:	<ol style="list-style-type: none"> 1. PASA Overview Presentation 2. Fulshear 2018 Demographic Update 		
EXPENDITURE REQUIRED:			EDC-funded
AMOUNT BUDGETED:			
FUNDING ACCOUNT:			
ADDITIONAL APPROPRIATION REQUIRED:			N/A
FUNDING ACCOUNT:			

EXECUTIVE SUMMARY

The EDCs funded an inaugural demographic study for the City of Fulshear in 2017 to better gauge our current population, and to project future residential and population growth. The City engaged PASA, a demography firm who already works extensively on the ground in Fort Bend and the greater Houston area on school district demographic reports and updates to complete the report.

The initial 2017 report was established a baseline for population projections and provided data that could be used in other planning efforts across the City. The report was made available on the City's website as has been utilized and referenced frequently.

2018 marks the first update to the report. Justin Silhavy, Director of Demographic Projections for PASA, will be on hand to present an overview of the update, and to answer any questions the EDCs or City Council might have.

City of Fulshear

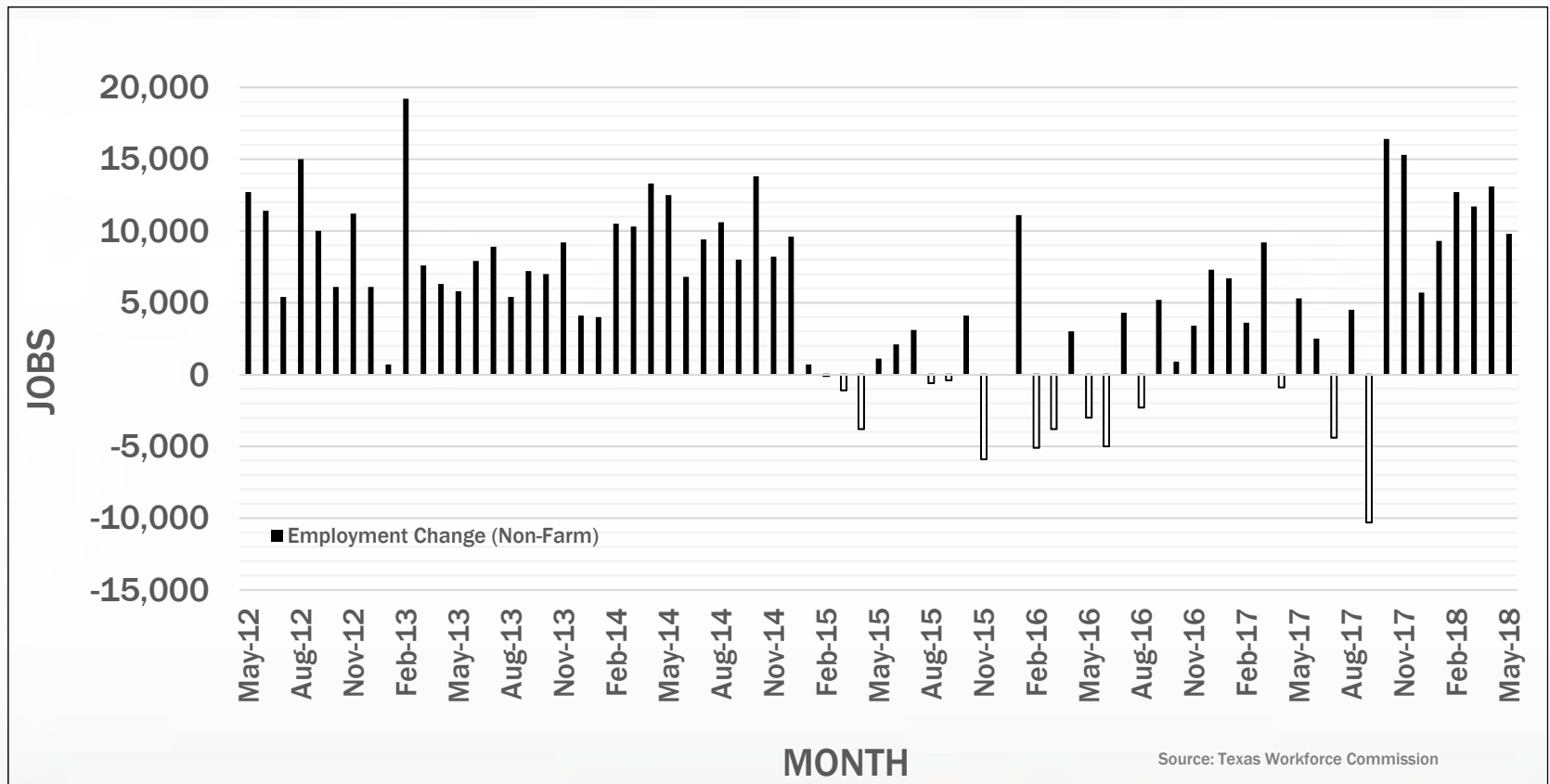
Demographic Update

Spring 2018

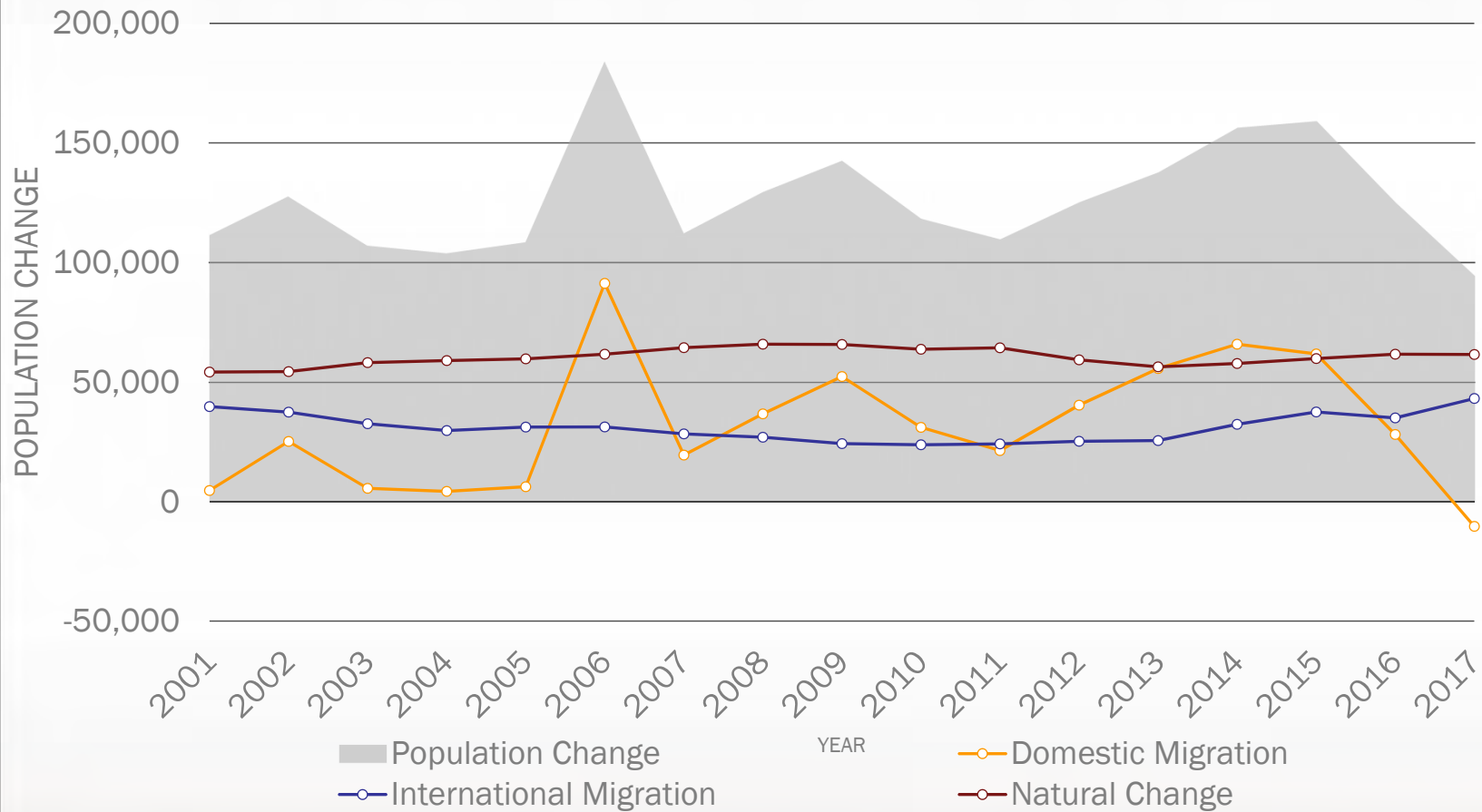


Monthly Employment Change

Houston Metro, Seasonally Adjusted

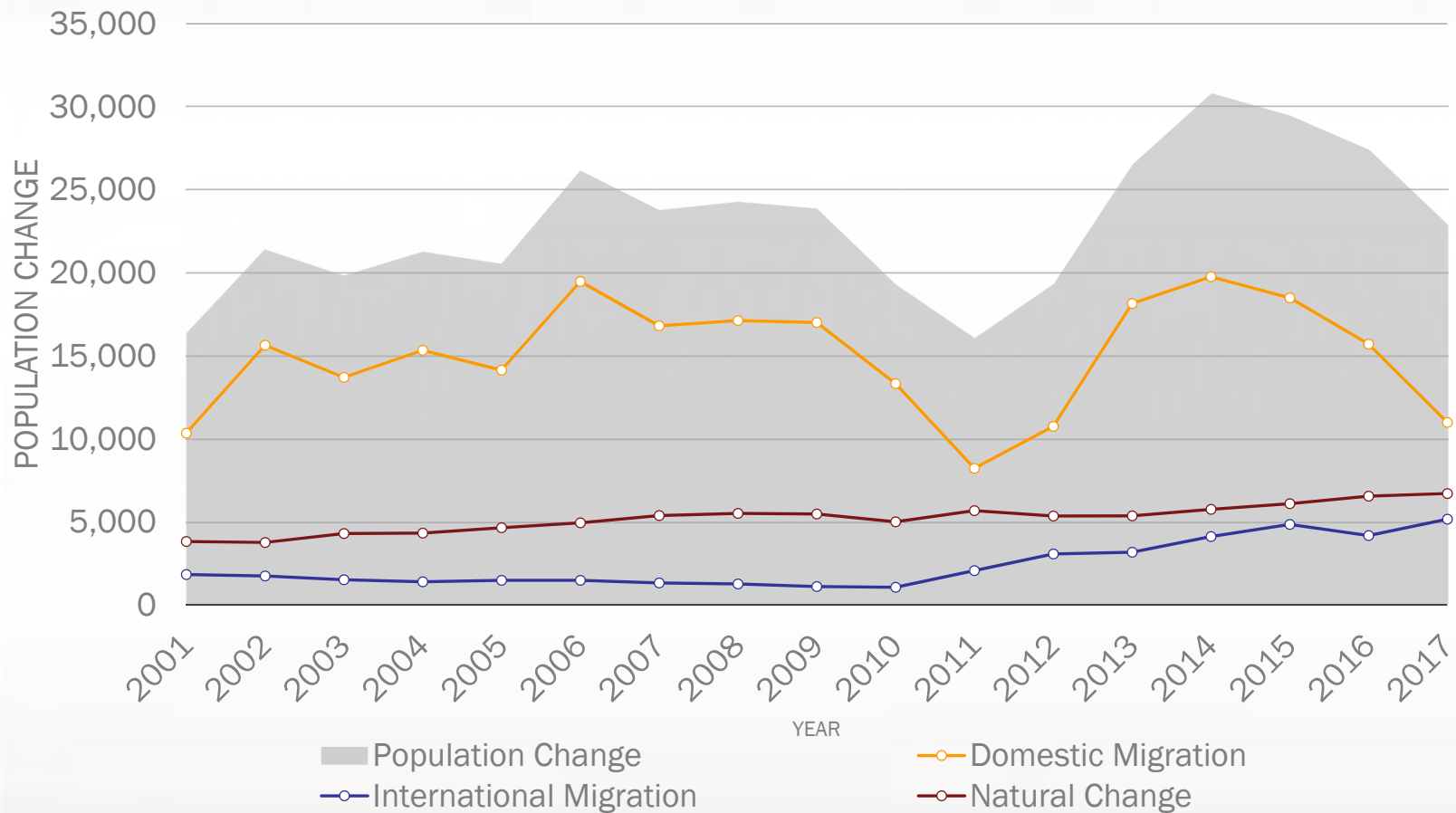


Annual Population Change Houston Metro

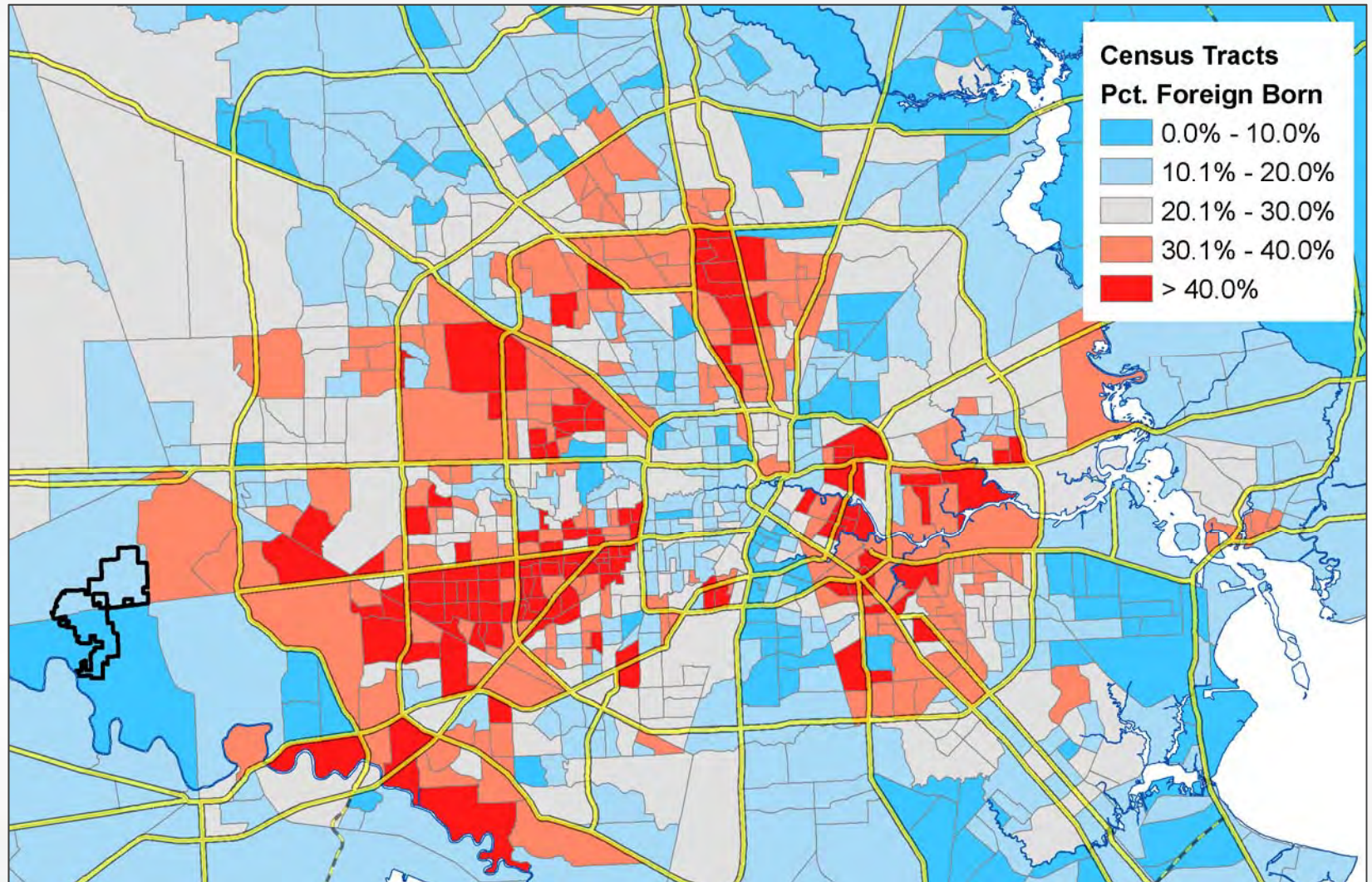


Annual Population Change

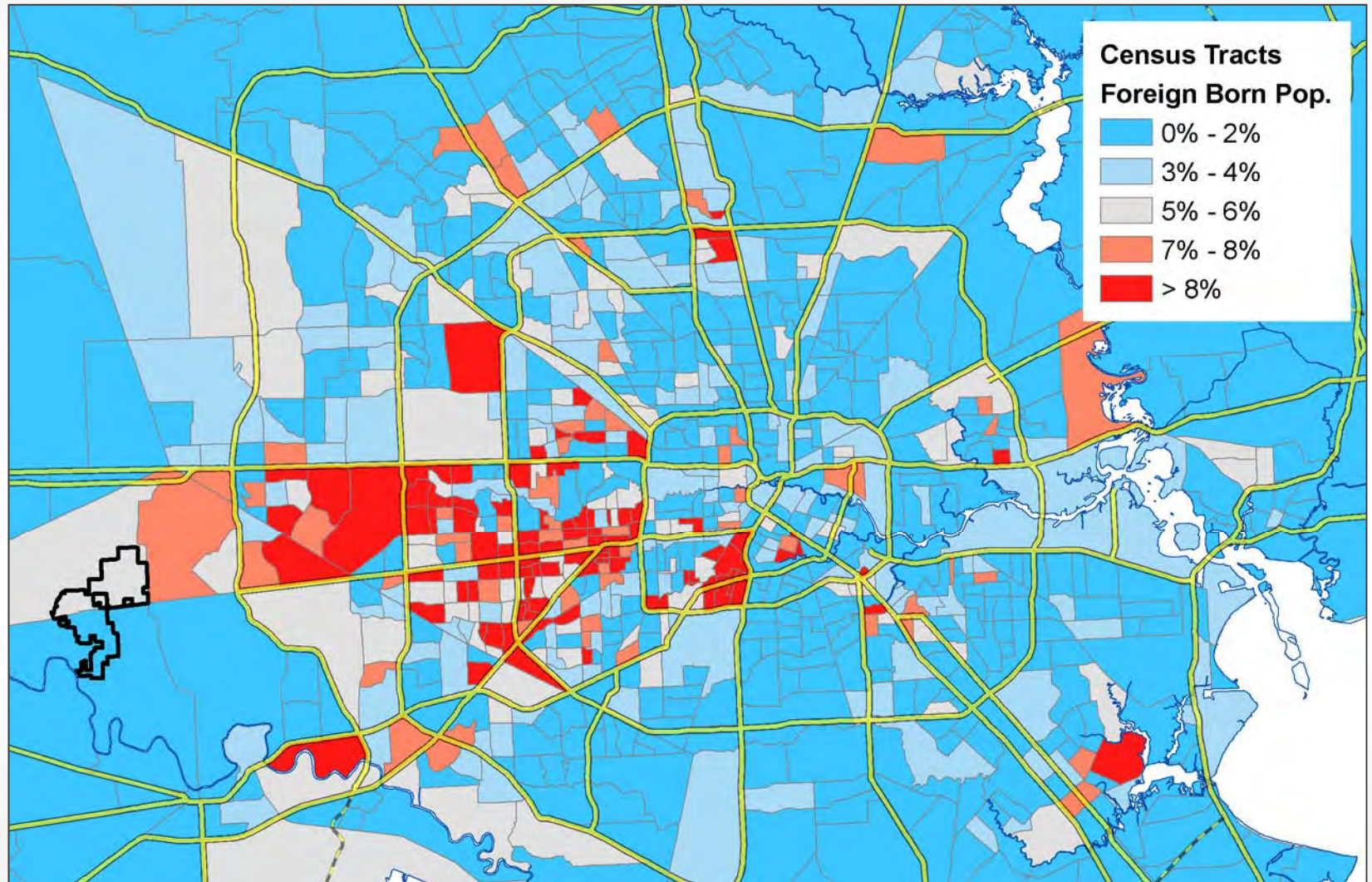
Fort Bend County



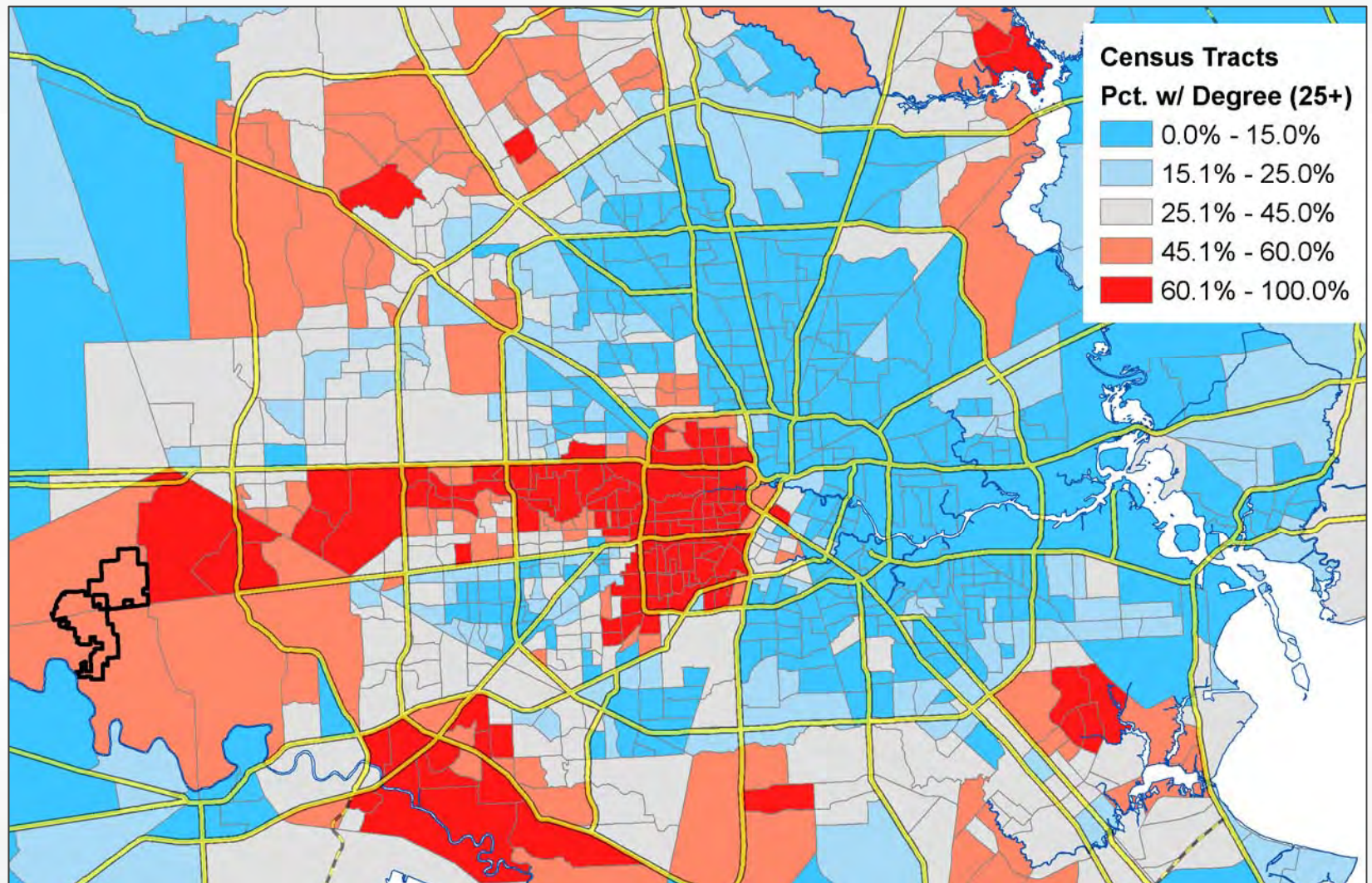
ACS 2016: Foreign-Born Population



ACS 2016: Foreign-Born, Entry After 2010



ACS 2016: Age 25+ with a Bachelor's Degree



Demographic Characteristics

City of Fulshear

U.S. Census Bureau, ACS 2016



Median Age 34.4

Houston Metro 34.2

In 2015: Fulshear = 35.2; Metro = 34.1

Bachelor's Degree or Higher

63.9% Houston Metro 32%



In 2015: Fulshear = 58.7%; Metro = 30.6%

Median Household Income



\$167,708

Houston Metro \$61,708

In 2015: Fulshear = \$175,990; Metro = \$61,465

Population Ages 5–17

26.2%

Houston Metro 19%



Mean Travel Time to Work 39.4

Houston Metro 30.0 minutes



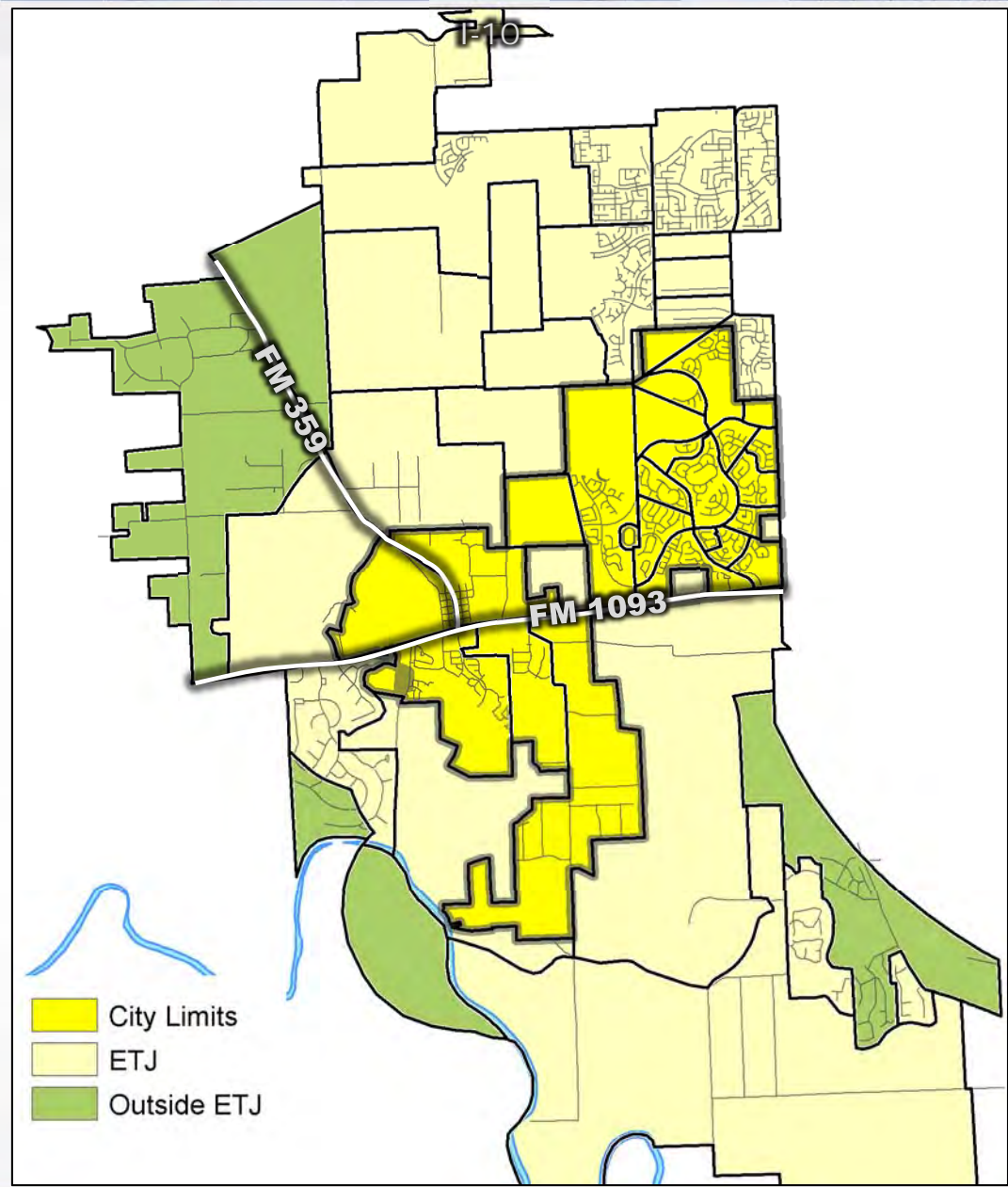
In 2015: Fulshear = 37.4; Metro = 30.2

Study Area

City Limits

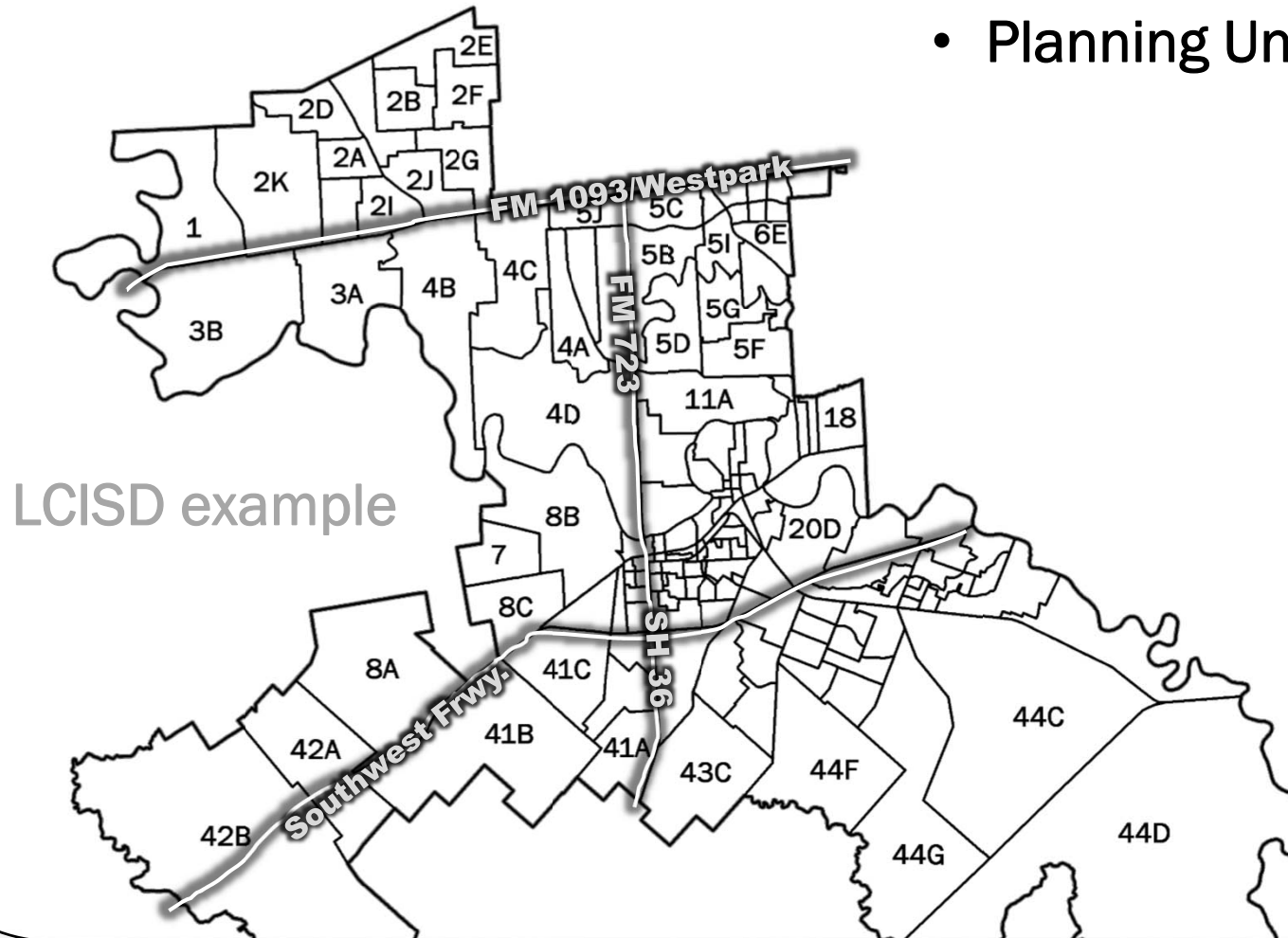
ETJ

Adjacent Areas
Outside any City's
ETJ

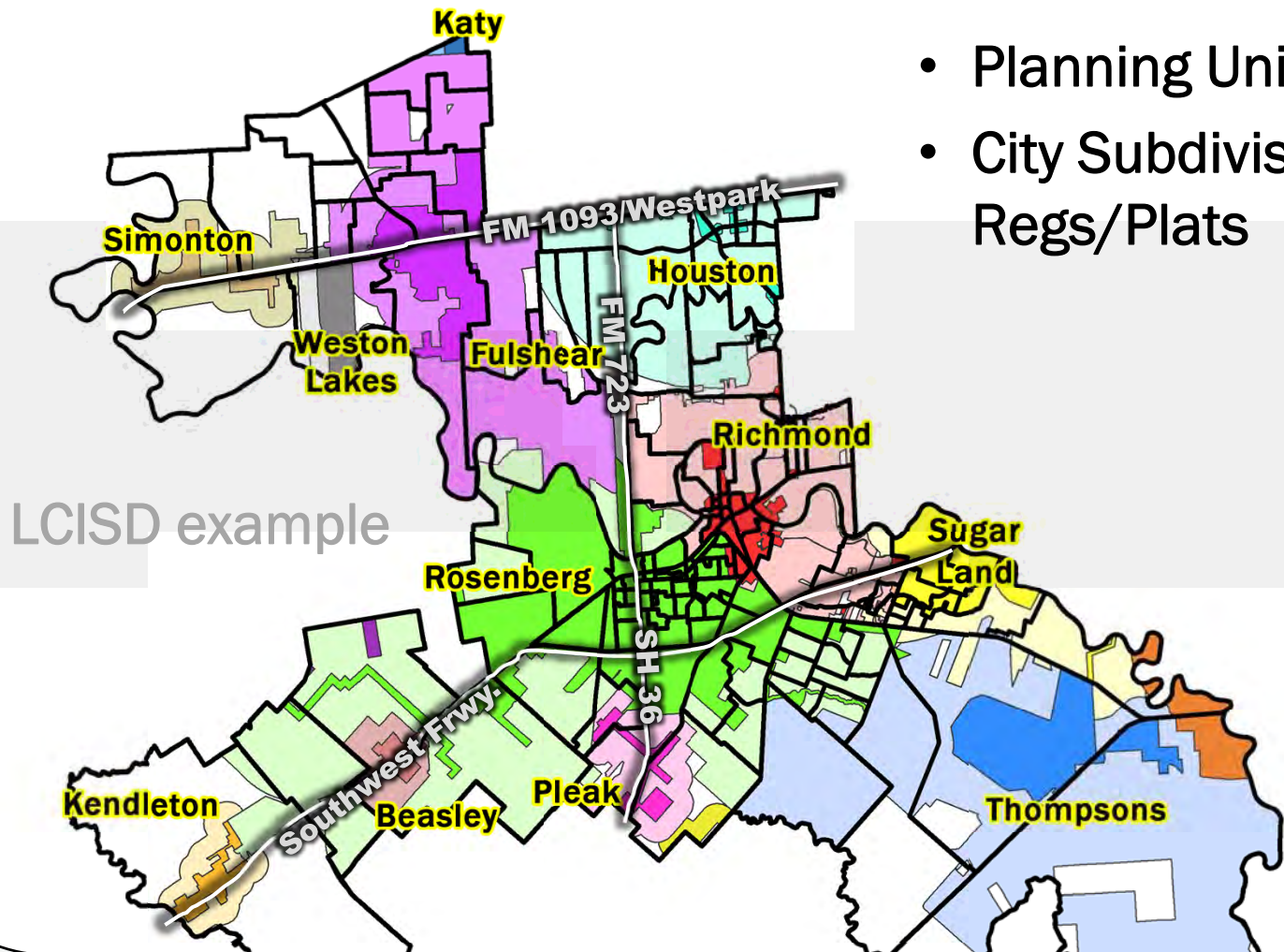


Methodology Crash Course

- Planning Units



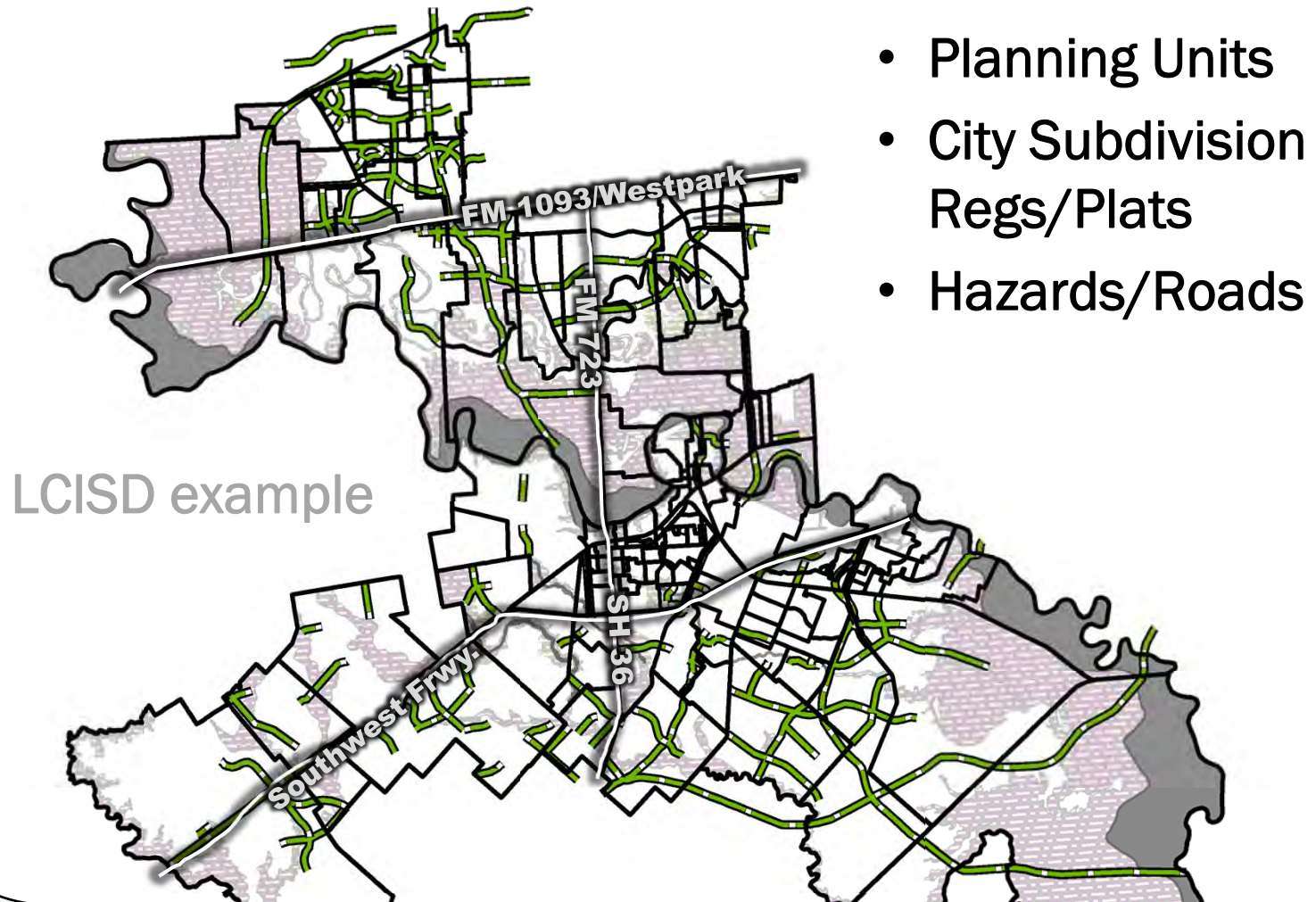
Methodology Crash Course



- Planning Units
- City Subdivision Regs/Plats

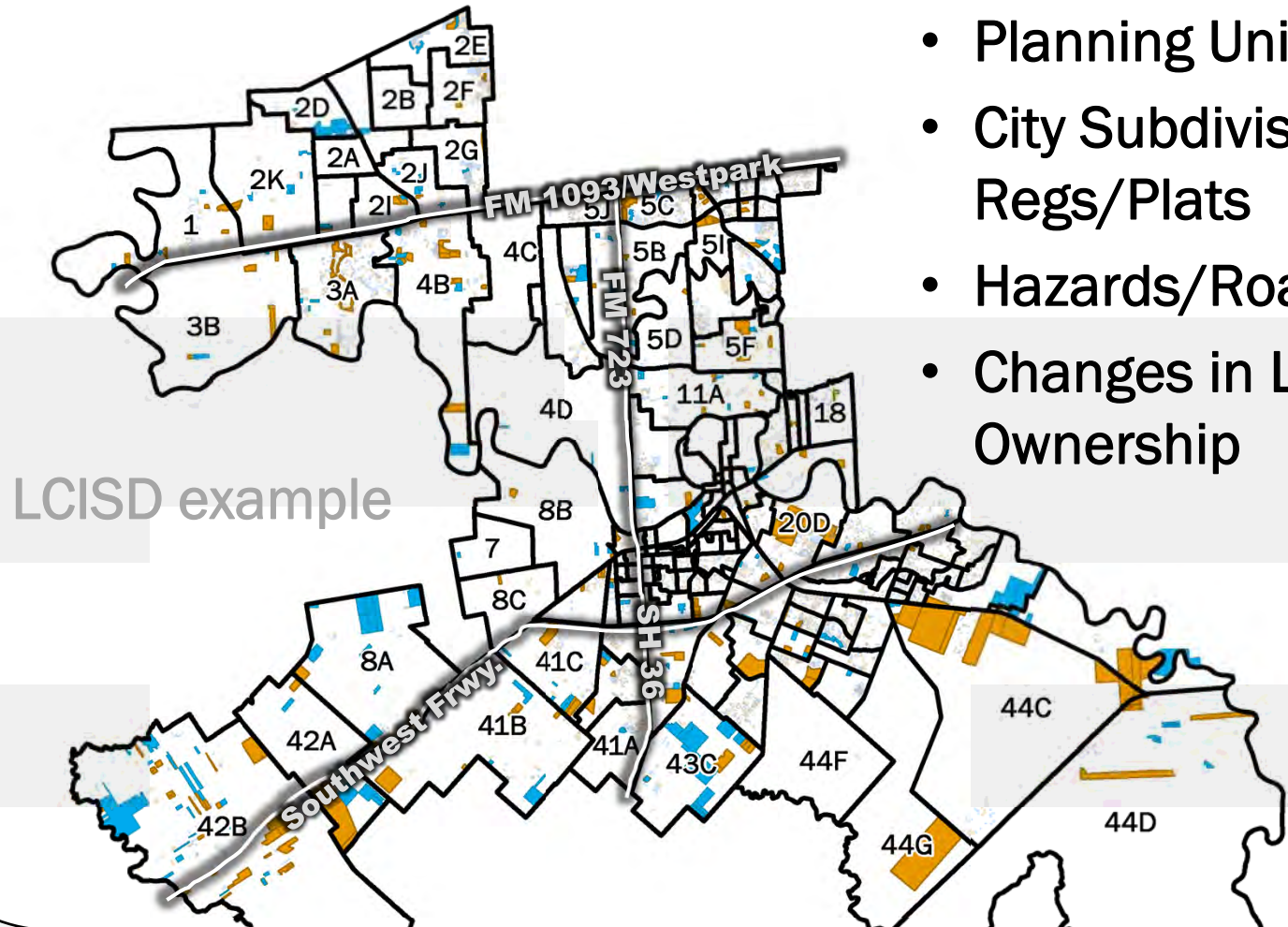
LCISD example

Methodology Crash Course



- Planning Units
- City Subdivision Regs/Plats
- Hazards/Roads

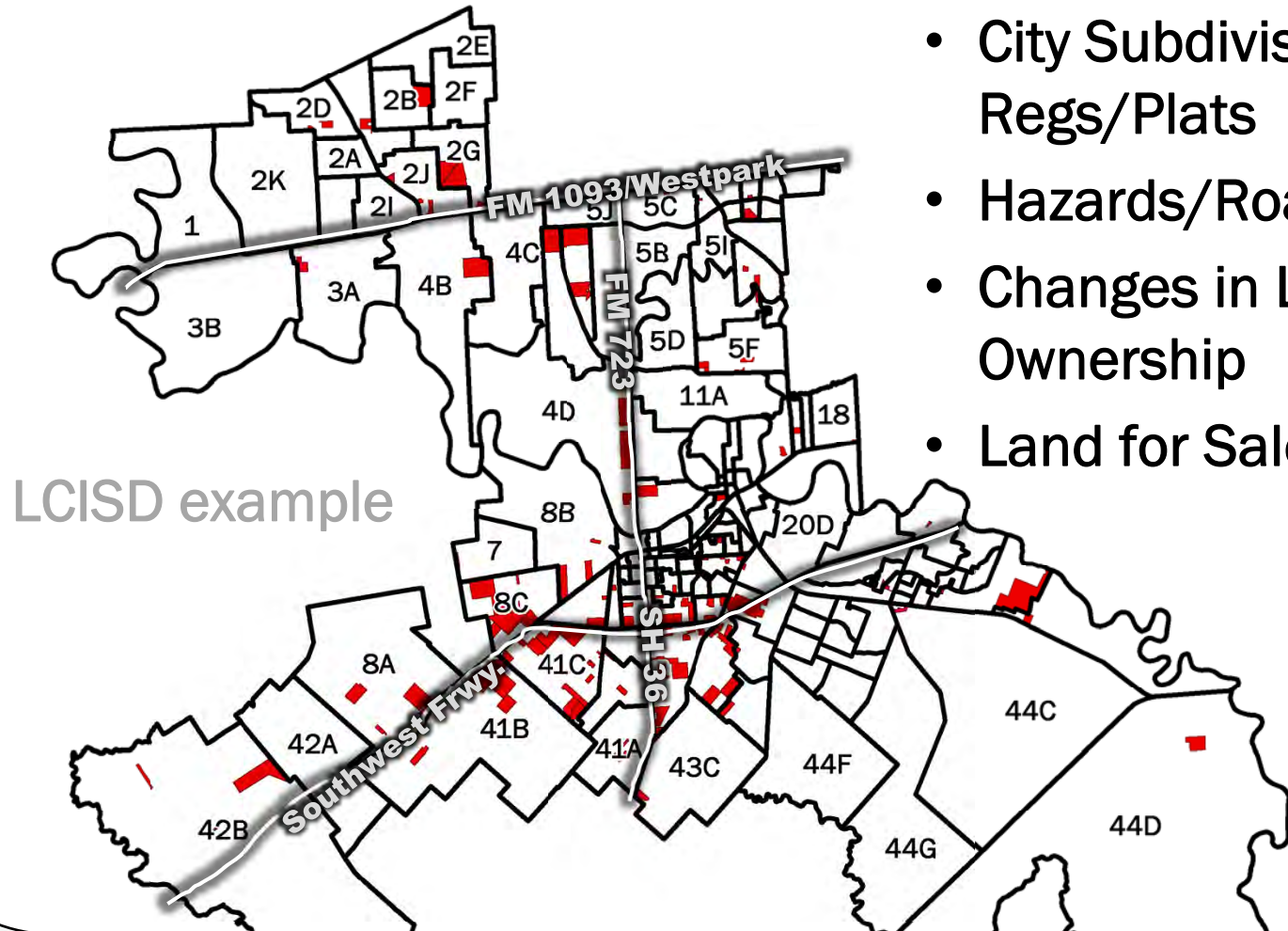
Methodology Crash Course



- Planning Units
- City Subdivision Regs/Plats
- Hazards/Roads
- Changes in Land Ownership

LCISD example

Methodology Crash Course



- City Subdivision Regs/Plats
- Hazards/Roads
- Changes in Land Ownership
- Land for Sale

Housing and Economic Growth

- **Master Planned Communities south of I-10 are showing signs of growth acceleration**
 - Post-Harvey flood plain regs. (Harris Co.)
 - Reservoir Flood Migration
 - Energy Sector rebound
 - Katy ISD south of I-10 nearing build-out
- **Westpark Tollway Expansion**
- **W. Grand Parkway – more lanes coming**
- **Industrial Development**
 - Amazon, Goya
 - Pintail Crossing: 2.2 million sq. ft., 150 ac.
 - Twinwood Business Park: 650 ac.

New Housing Growth

- **Record May 2018 sales in Cross Creek**
 - Cinco Ranch is basically built out
 - Lamar CISD schools are pushing sales up
- **Polo Ranch & Fulshear Lakes**
- **Other Major developers are looking for land**
- **Harrison Tracts/”Fulshear Farms”**
- **Kingsland Heights – 462 lots**
- **LID 21 is in the planning stage**
 - 4,626 acres known as Foster Farms
 - ~3,150 developable acres exists behind future levee
 - Recent flooding events will likely delay a project here

Most Active Residential Developments Projected Housing Occupancies

SINGLE FAMILY

Five Largest Single-Family Developments	2017-2022	2022-2027	2017-2027
Tamarron	2,049	2,311	4,360
Cross Creek Ranch	2,095	1,022	3,117
Jordan Ranch	1,056	1,369	2,425
Harrison Interests Tract	140	1,420	1,560
Fulshear Farms	235	1,080	1,315
Total Projected New Single-Family Occupancies	6,776	11,661	18,899

MULTI- FAMILY

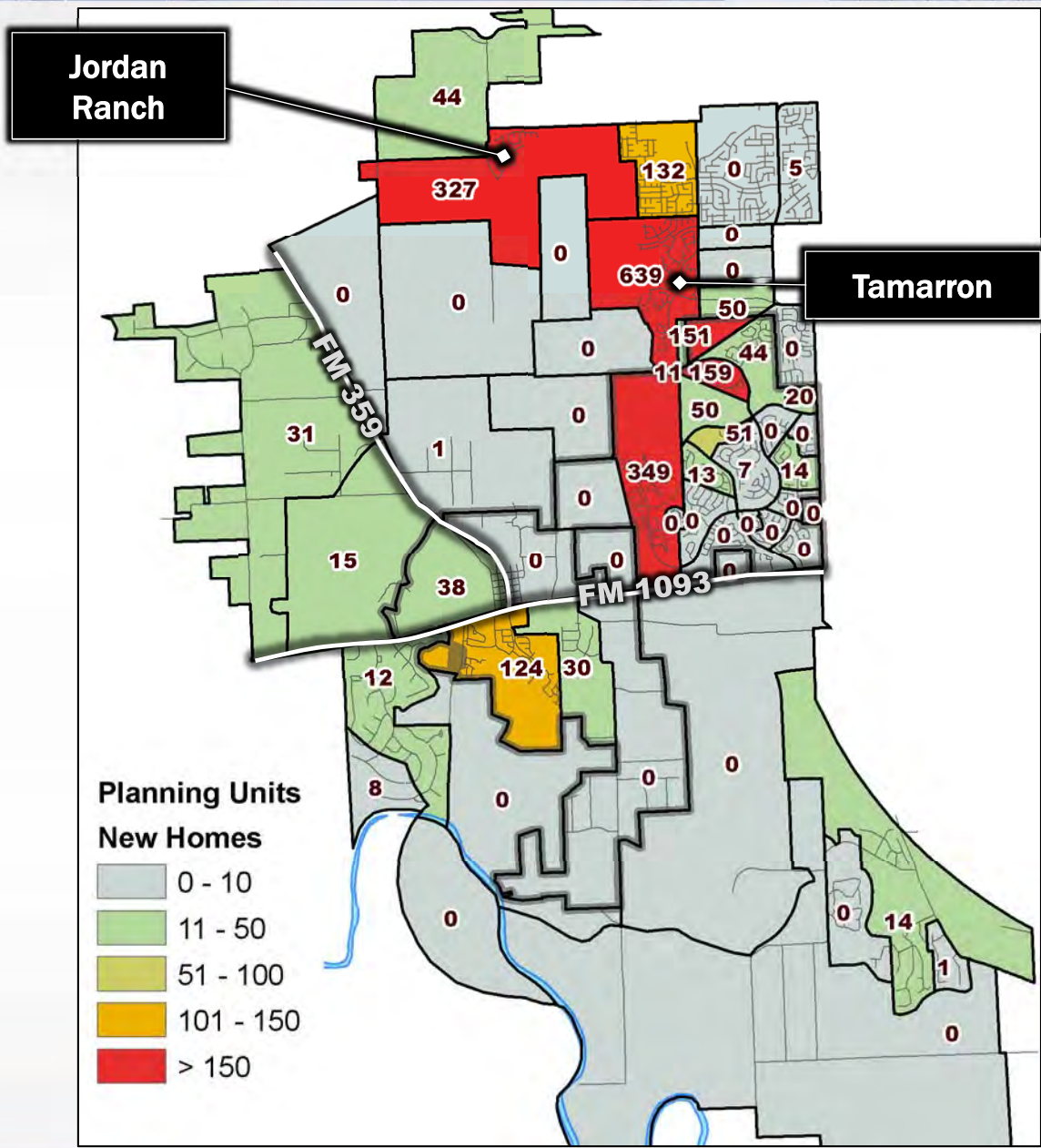
Five Largest Multi-Family Developments	2017-2022	2022-2027	2017-2027
Cross Creek Ranch (PU H19/H20)	175	450	625
Jordan Ranch MF	25	360	385
Park Lane Fulshear (Cross Creek)	280	100	380
Potential MF in PU B03	25	325	350
Point West	0	225	225
Total Projected New Multi-Family Occupancies	580	1,735	2,315

Projected New Housing Occupancies Jan. 2018 – Oct. 2027

	Single-Family	Multi-Family	Mixed Use	Age-Restricted	Total
Jan 2018–Oct 2018	798	0	0	48	846
Oct 2018–Oct 2019	1,135	20	50	68	1,273
Oct 2019–Oct 2020	1,305	150	80	80	1,615
Oct 2020–Oct 2021	1,659	155	125	84	2,023
Oct 2021–Oct 2022	1,879	255	150	87	2,371
Oct 2022–Oct 2023	2,049	315	175	80	2,619
Oct 2023–Oct 2024	2,228	310	170	80	2,788
Oct 2024–Oct 2025	2,385	345	205	80	3,015
Oct 2025–Oct 2026	2,518	375	215	80	3,188
Oct 2026–Oct 2027	2,481	390	215	80	3,166
Jan 2018–Oct 2022	6,776	580	405	367	8,128
Oct 2022–Oct 2027	11,661	1,735	980	400	14,776
Jan 2018–Oct 2027	18,899	2,315	1,385	767	23,366

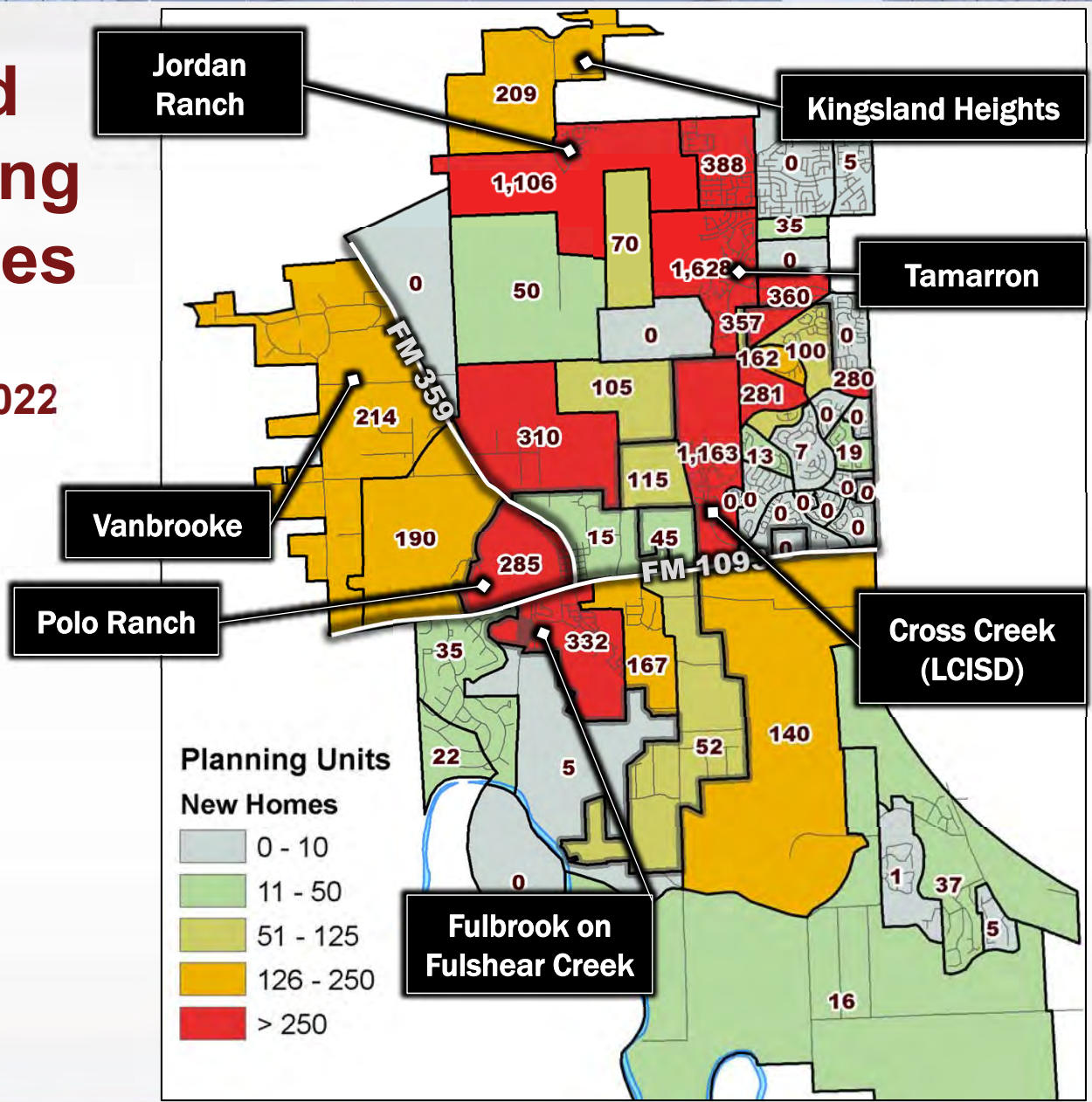
Projected New Housing Occupancies

Jan. 2018–Oct. 2019



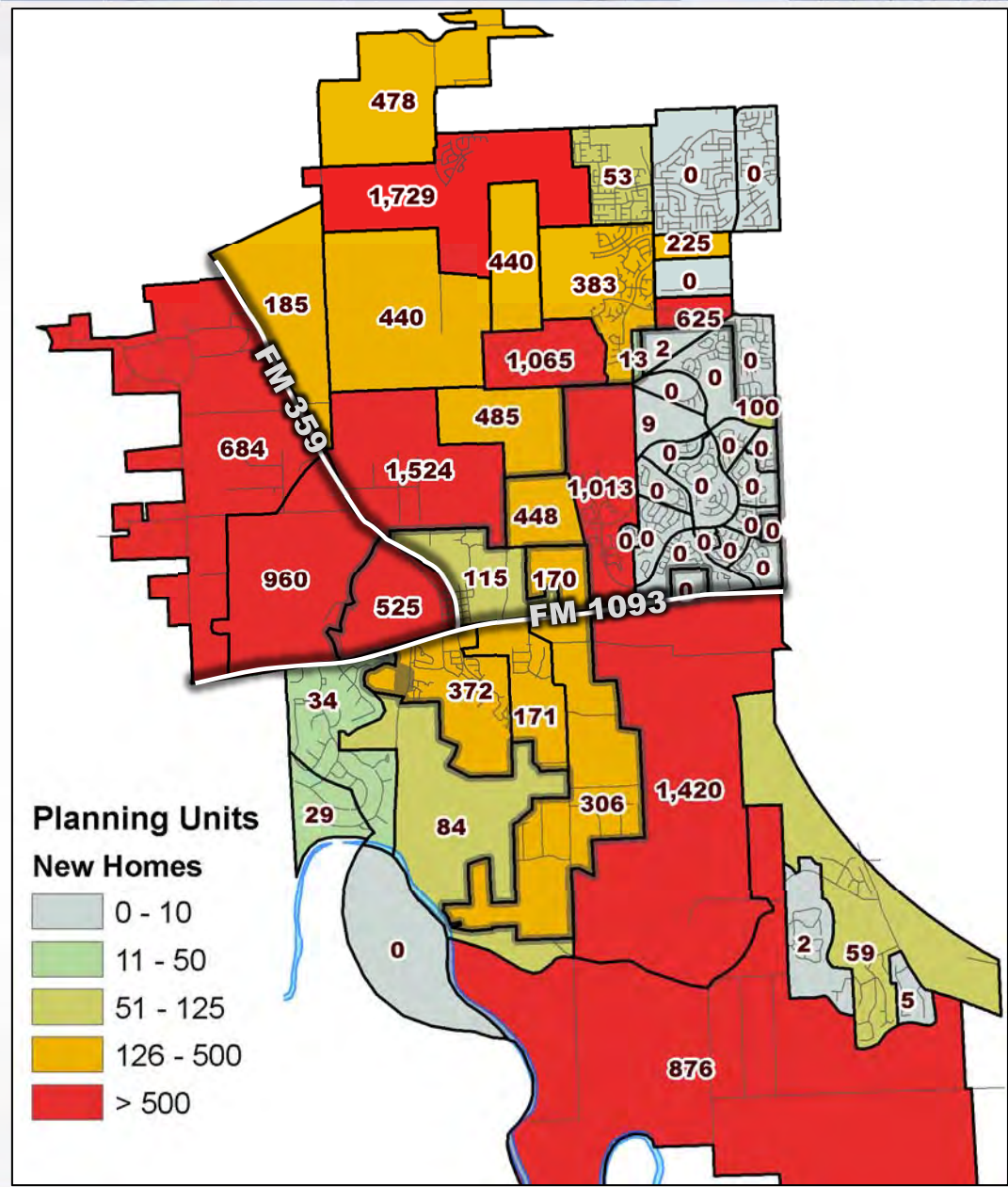
Projected New Housing Occupancies

Jan. 2018–Oct. 2022



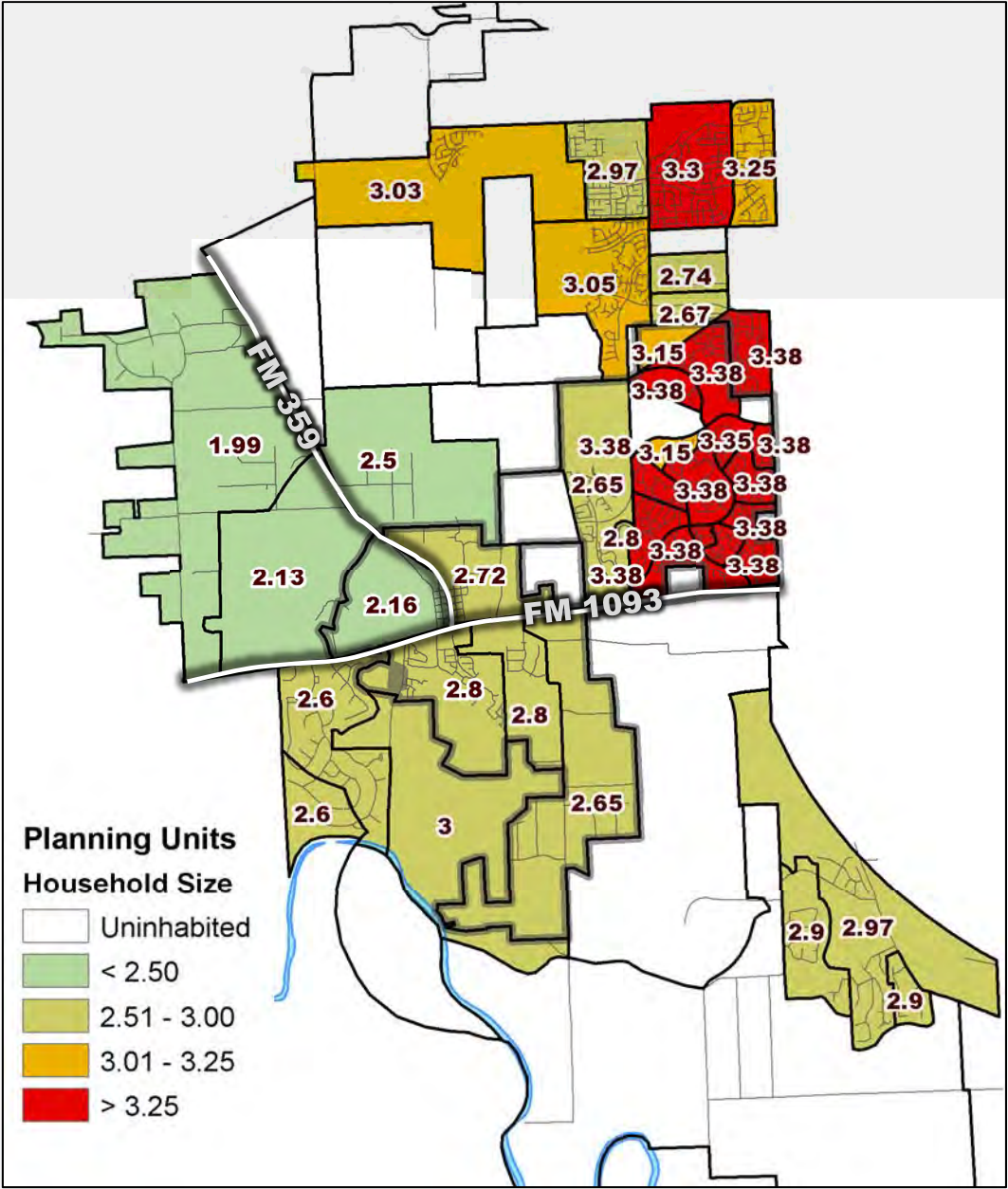
Projected New Housing Occupancies

Oct. 2022–Oct. 2027



Estimated Household Size

2017



Typical Household Size

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

Students per Occupied Home by School District

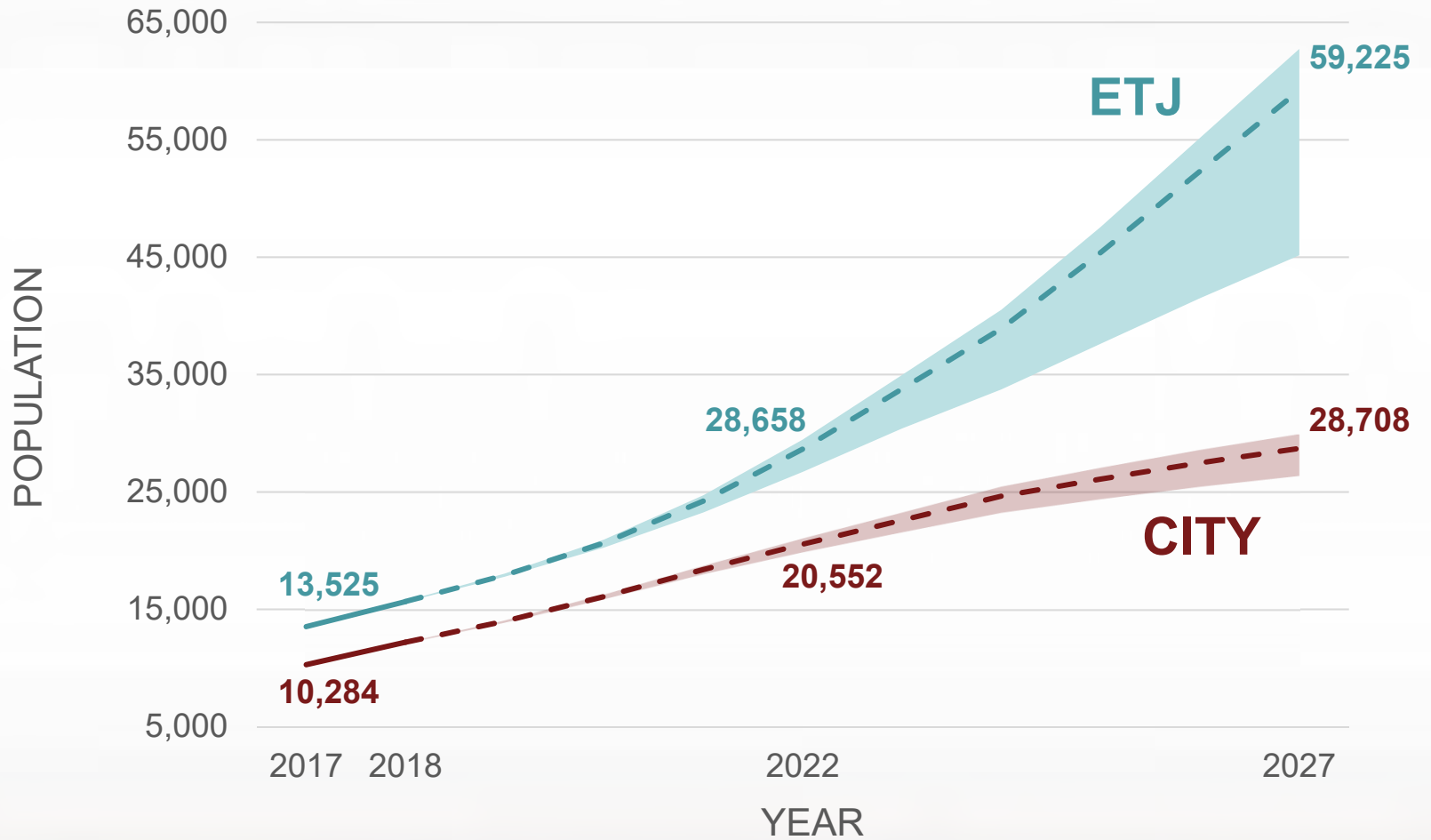
Katy ISD = 0.72 overall

- Cinco Ranch/Cross Creek = 0.90 to 1.40

Lamar CISD = 0.58 overall

- Cross Creek = 0.16 (but increasing now)
- Tamarron /Fulbrook on F.C.= 0.48 to 0.55
- Lakes of Bella Terra = 0.50

Growth Scenarios



Growth Scenarios – City Limits

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Low										
Population	12,160	13,925	15,910	18,028	19,887	21,582	23,241	24,393	25,443	26,363
% Growth	0.18	0.15	0.14	0.13	0.10	0.09	0.08	0.05	0.04	0.04
Growth	1,876	1,765	1,985	2,118	1,859	1,695	1,659	1,152	1,050	920
Moderate										
Population	12,198	13,999	16,088	18,390	20,552	22,594	24,642	26,100	27,482	28,708
% Growth	0.19	0.15	0.15	0.14	0.12	0.10	0.09	0.06	0.05	0.04
Growth	1,914	1,801	2,089	2,302	2,162	2,042	2,048	1,458	1,382	1,226
High										
Population	12,236	14,109	16,302	18,742	21,055	23,250	25,462	27,051	28,564	29,913
% Growth	0.19	0.15	0.16	0.15	0.12	0.10	0.10	0.06	0.06	0.05
Growth	1,952	1,873	2,193	2,440	2,313	2,195	2,212	1,589	1,513	1,349

Growth Scenarios – ETJ

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Low										
Population	15,626	17,774	20,256	23,252	26,705	30,394	33,736	37,623	41,499	45,158
% Growth	0.16	0.14	0.14	0.15	0.15	0.14	0.11	0.12	0.10	0.09
Growth	2,101	2,148	2,482	2,996	3,453	3,689	3,342	3,887	3,876	3,659
Moderate										
Population	15,669	17,906	20,664	24,231	28,658	33,782	38,923	45,401	52,322	59,225
% Growth	0.16	0.14	0.15	0.17	0.18	0.18	0.15	0.17	0.15	0.13
Growth	2,144	2,237	2,758	3,567	4,427	5,124	5,141	6,478	6,921	6,903
High										
Population	15,712	18,038	20,934	24,715	29,452	34,960	40,512	47,573	55,151	62,744
% Growth	0.16	0.15	0.16	0.18	0.19	0.19	0.16	0.17	0.16	0.14
Growth	2,187	2,326	2,896	3,781	4,737	5,508	5,552	7,061	7,578	7,593

Population Projections by Community

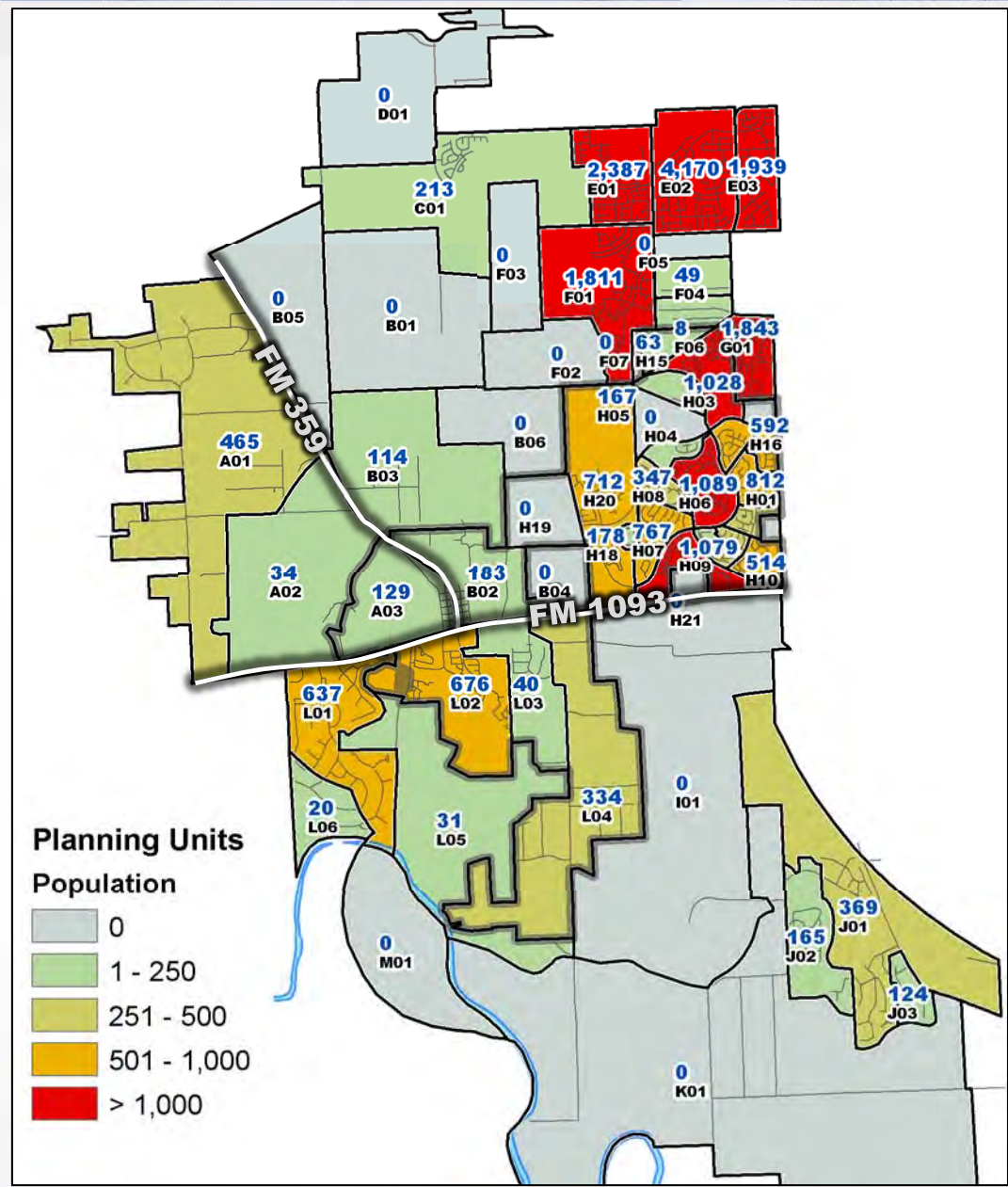
Community	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	
CITY LIMITS	Cross Creek Ranch	8,922	10,570	12,031	13,675	15,365	16,769	17,980	19,196	19,858	20,433	20,892
	Downtown Area (A03, B02)	312	329	443	638	898	1,191	1,516	1,841	2,183	2,538	2,892
	Fulbrook on Fulshear Creek	676	866	1,042	1,237	1,444	1,657	1,882	2,108	2,342	2,564	2,736
	Fulshear Run	40	81	131	186	285	425	568	711	760	801	832
ETJ	Churchill Farms	1,843	1,959	1,979	1,999	2,019	2,039	2,059	2,080	2,101	2,122	2,143
	Firethorne	8,496	9,211	9,543	9,966	10,381	10,744	11,014	11,290	11,443	11,605	11,774
	Foster Farms	0	0	0	3	19	50	163	276	863	1,603	2,499
	Fulbrook	657	715	743	773	806	835	861	887	921	950	982
	Fulshear Farms	0	6	8	87	372	935	1,629	2,323	3,299	4,386	5,461
	Fulshear Lakes	0	2	45	159	334	537	787	1,037	1,541	2,158	2,791
	Harrison Interests Tract	0	0	0	11	114	366	795	1,224	2,055	2,956	3,970
	Jordan Ranch	213	611	1,182	1,812	2,598	3,540	4,535	5,535	6,489	7,399	8,311
	Tamarron	1,811	2,637	3,627	4,580	5,560	6,527	7,549	8,576	9,516	10,363	10,959

Projected Population by Jurisdiction

Area	Oct. 2017	Oct. 2018	Oct. 2020	Oct. 2022	Oct. 2025	Oct. 2027
City	10,284	12,198	16,088	20,552	26,100	28,708
ETJ	13,525	15,669	20,664	28,658	45,401	59,225
City + ETJ	23,809	27,867	36,752	49,210	71,501	87,933
Outside ETJ	854	944	1,200	1,685	2,922	4,302
SINGLE MEMBER DISTRICTS						
District 1	2,074	2,697	4,574	7,579	12,557	14,968
District 2	2,432	2,701	3,351	3,887	3,960	4,004
District 3	2,406	3,177	4,373	5,169	5,495	5,529
District 4	1,754	1,878	1,948	2,022	2,120	2,187
District 5	1,618	1,745	1,842	1,895	1,968	2,020

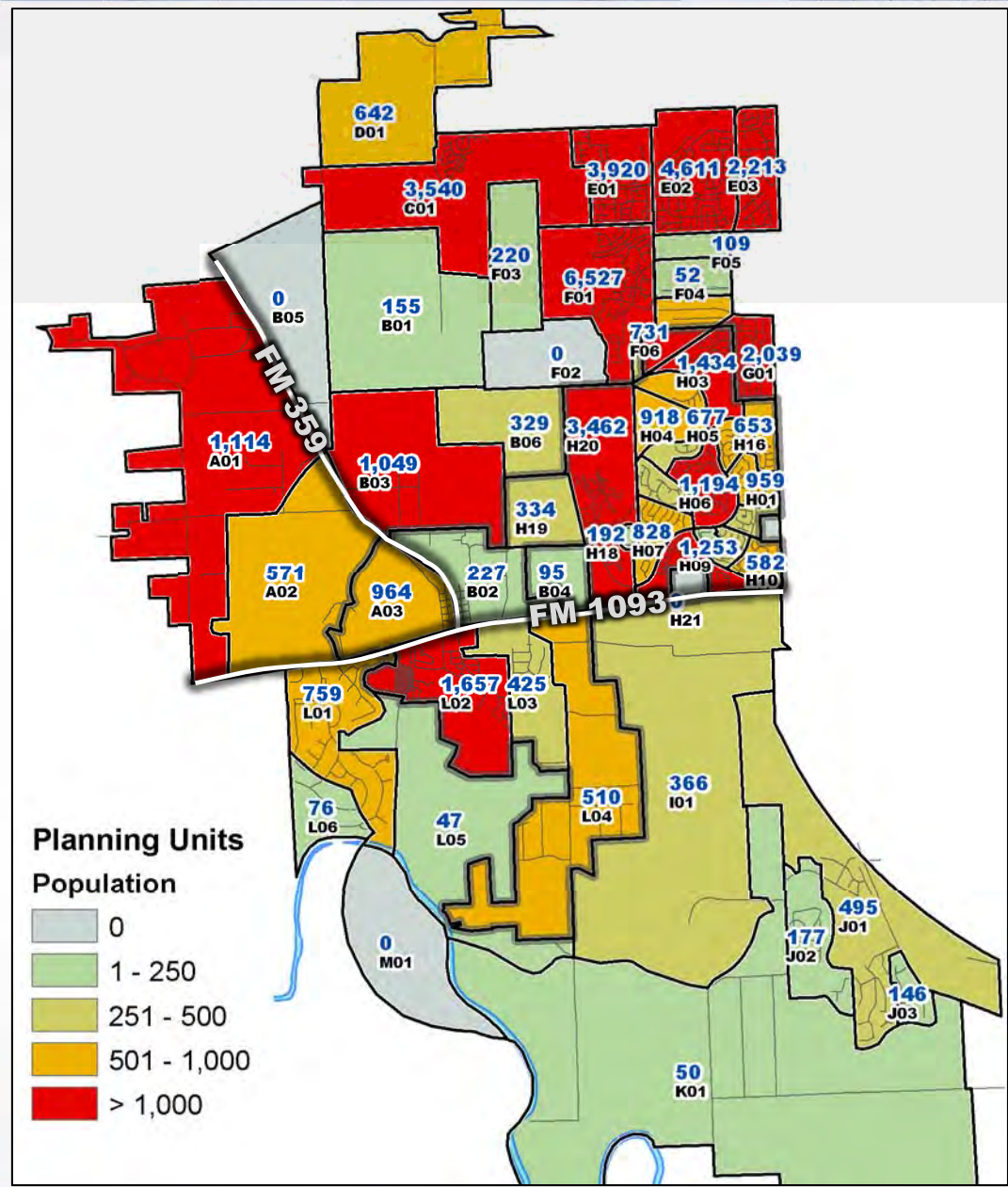
Estimated Population by Planning Unit

Oct. 2017



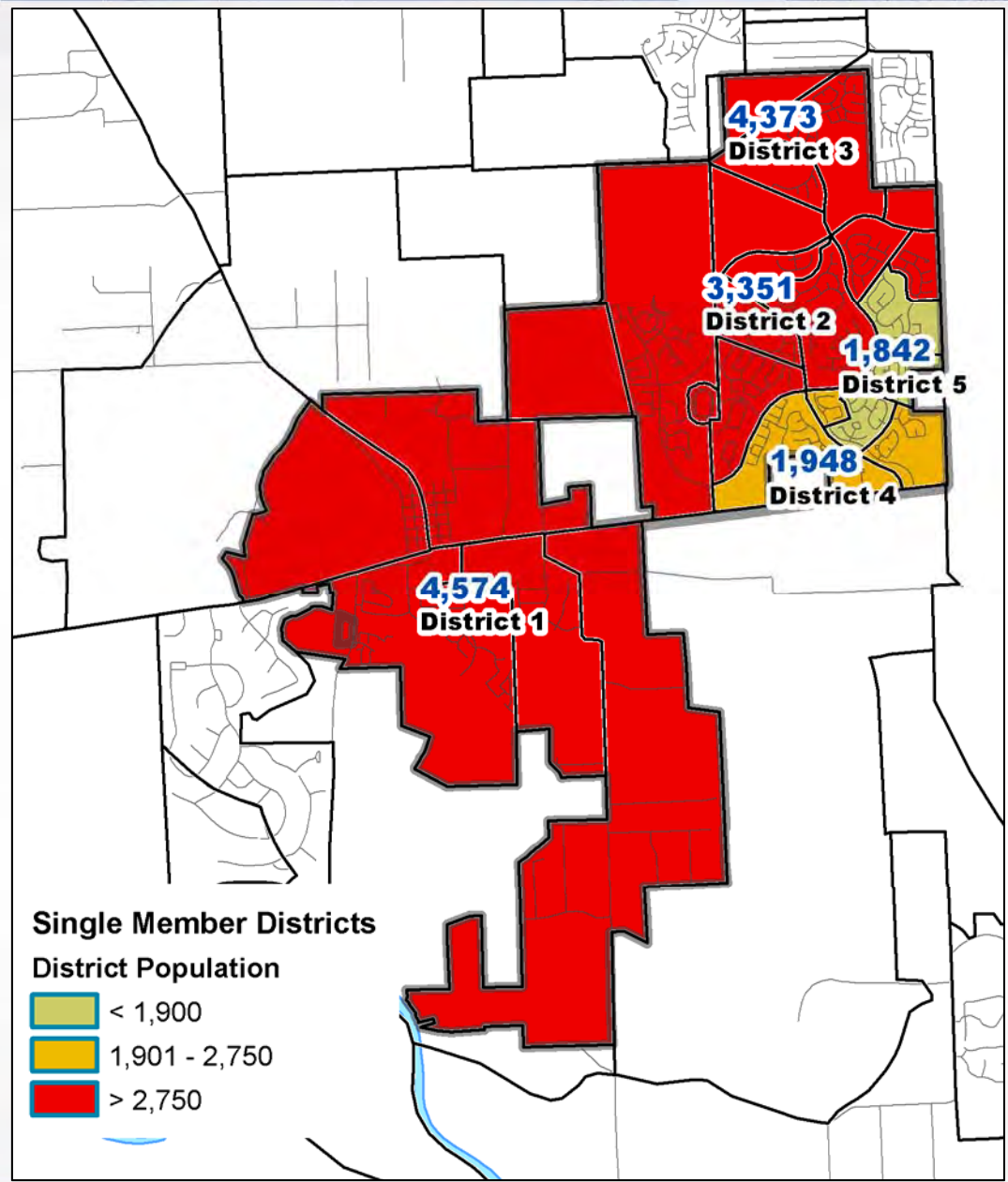
Projected Population by Planning Unit

Oct. 2022



Projected Population by Single Member District

Oct. 2020



City of Fulshear

Demographic Update

Spring 2018



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 2017 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 10,284. This represents a population increase of 1,763 (20.7%) from October 2016 to October 2017.

City	10,284
ETJ	13,525
City + ETJ	23,809

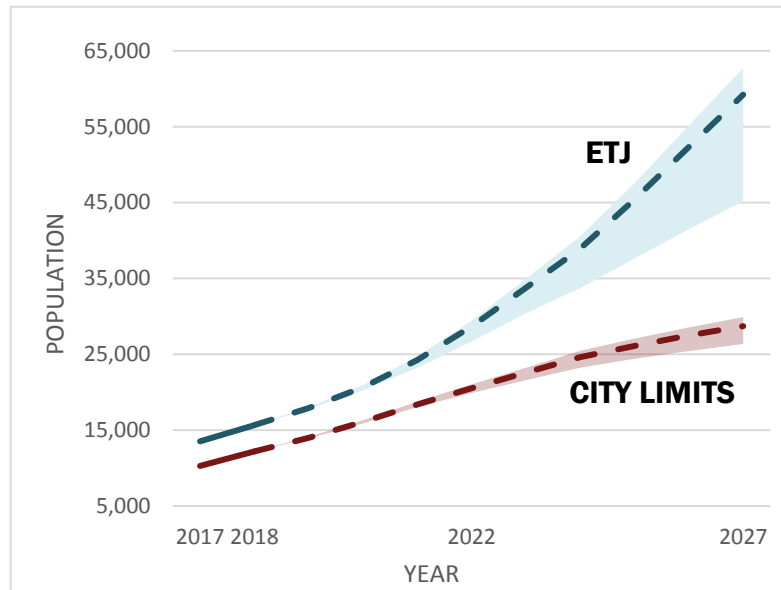
ANNUAL POPULATION PROJECTIONS

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
City											
Population	10,284	12,198	13,999	16,088	18,390	20,552	22,594	24,642	26,100	27,482	28,708
Change		1,914	1,801	2,089	2,302	2,162	2,042	2,048	1,458	1,382	1,226
Growth		19%	15%	15%	14%	12%	10%	9%	6%	5%	4%
ETJ											
Population	13,525	15,669	17,906	20,664	24,231	28,658	33,782	38,923	45,401	52,322	59,225
Change		2,144	2,237	2,758	3,567	4,427	5,124	5,141	6,478	6,921	6,903
Growth		16%	14%	15%	17%	18%	18%	15%	17%	15%	13%
City + ETJ		27,867	31,905	36,752	42,621	49,210	56,376	63,565	71,501	79,804	87,933

Without annexation, growth in the City Limits is expected to decrease from a projected peak gain of approximately 2,300 in 2021 to 1,226 in 2027. The annual population change within the ETJ is projected to grow larger throughout the ten-year projection period. By October 2018, an additional 2,144 people are projected to live in the Fulshear ETJ. By 2025, the population of the ETJ is projected to expand by over 6,000 annually.

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 left. The moderate growth scenarios are illustrated with hashed trend lines. In red, the population in the City Limits is projected to grow to over 28,000 by 2027. 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	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	
CITY LIMITS	Cross Creek Ranch	8,922	10,570	12,031	13,675	15,365	16,769	17,980	19,196	19,858	20,433	20,892
	Downtown Area (A03, B02)	312	329	443	638	898	1,191	1,516	1,841	2,183	2,538	2,892
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	Fulshear Run	40	81	131	186	285	425	568	711	760	801	832
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	Jordan Ranch	213	611	1,182	1,812	2,598	3,540	4,535	5,535	6,489	7,399	8,311
	Tamarron	1,811	2,637	3,627	4,580	5,560	6,527	7,549	8,576	9,516	10,363	10,959

PROJECTIONS BY AGE GROUP

City of Fulshear

Age Group	2017		2022	
	*Estimate	%	**Projection	%
Under 5 Years	1,008	9.8%	1,965	9.6%
5 to 17 Years	2,694	26.2%	5,254	25.6%
18 to 24 Years	474	4.7%	667	3.2%
25 to 34 Years	1,183	11.5%	1,990	9.7%
35 to 54 Years	3,548	34.5%	6,633	32.3%
55 to 74 Years	1,214	11.8%	3,289	16.0%
75 Years and Over	165	1.6%	754	3.7%
All Age Groups	10,284		20,552	

Source: U.S. Census

*Estimate is based on the Five-Year, 2016 American Community Survey

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 2018–Oct 2018	798	0	0	48	846
Oct 2018–Oct 2019	1,135	20	50	68	1,273
Oct 2019–Oct 2020	1,305	150	80	80	1,615
Oct 2020–Oct 2021	1,659	155	125	84	2,023
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Jan 2018–Oct 2027	18,899	2,315	1,385	767	23,366

PROPORTION OF HOUSING UNITS BY HOUSING TYPE

Housing Type	2017		2022 Projected		2027 Projected	
Single-Family/Condo/Mixed Use	7,869	99.2%	15,163	93.8%	27,100	89.6%
Age-Restricted SF	60	0.8%	427	2.6%	827	2.7%
Multi-Family	0	0.0%	580	3.6%	2,315	7.7%
Total Housing Units	7,929		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 3.12.**

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	2017		2022 Projected		2027 Projected	
Single-Family	23,704	99.56%	47,278	96.1%	82,047	93.3%
Age-Restricted SF	105	0.44%	747	1.5%	1,447	1.6%
Multi-Family	0	0.00%	1,185	2.4%	4,439	5.0%
Population	23,809		49,210		87,933	

*Housing Units in the City and ETJ

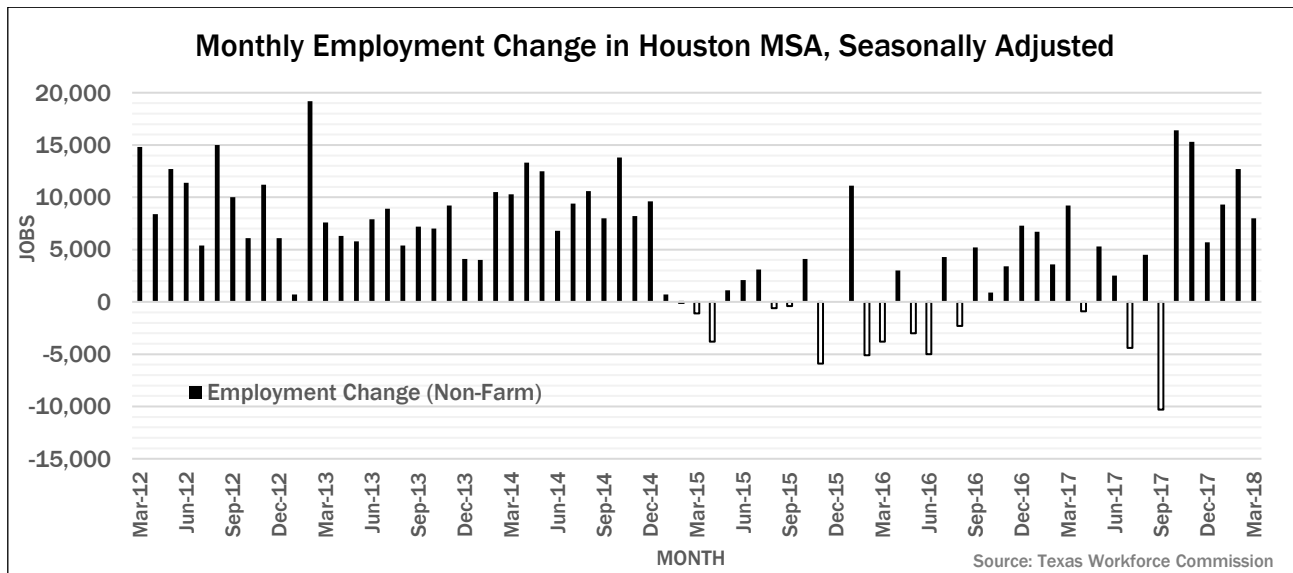
HOUSING OCCUPANCY STATUS

PASA considers vacant housing when creating population projections for such a large study area. The U.S. Census estimates that 8.5% of the existing housing stock in the City of Fulshear is vacant per the 2016 American Community Survey. In the two Census Tracts covering the Study Area, the Survey estimates the vacancy rate to be 4.8%, cumulatively. PASA has assumed a 5% 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.

THE ECONOMY AND GROWTH IN THE WESTERN SUBURBS

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.



Patrick Jankowski of the Greater Houston Partnership projects another 45,500 new jobs in 2018. In a December 2017 interview on KUHF’s “Houston Matters,” Jankowski says Houston is close to being back to its trend of 50,000–60,000 jobs annually. He believes this normal job growth will likely be reached as soon as 2019. Considering nearly 30,000 jobs were created in the first three months of 2018, according to the Texas Workforce Commission, this upswing may have already started. Other industries are thriving, particularly in the eastern and southern regions of the Metro, however. If the energy sector, oil and gas in particular, pick back up, growth will likely accelerate in Fulshear. However, if the local economy is dampened further by

even lower oil prices, the western suburbs could see a slowdown in housing and population growth.

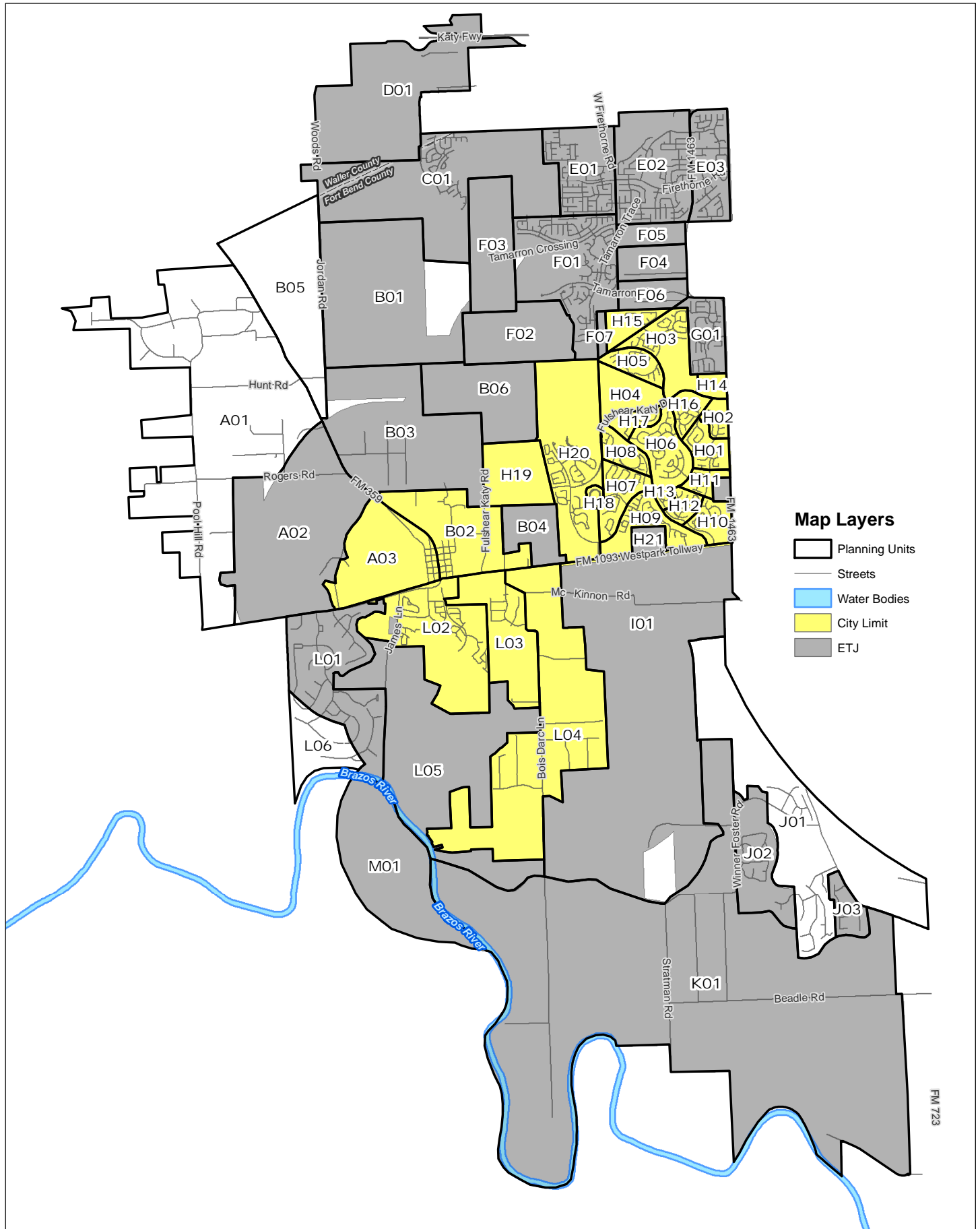
The Houston Metro Area has been resilient since the oil price slump began in 2014. The energy industry, in particular oil and gas, remains a major sector of the Houston economy. Since the 2014/2015 bust, the price of oil has rebounded from a low of \$28 a barrel in January 2016 to near \$70 in May 2018. Large firms that downsized in the oil price slump have been conservatively hiring, but upstream employment gains remain sluggish—particularly in the Energy Corridor. Economists are cautiously optimistic as the economy, post-Hurricane Harvey, has improved.

The western suburbs are becoming increasingly more industrial as land prices increase inside the urban core. Also, growth in the manufacturing and distribution sectors have led to many new companies moving to the fringes of Metro Houston to take advantage of highway networks leading to other large urban centers in Texas and beyond. Recently, Amazon completed its 1 million square foot fulfillment center at the northeast corner of Woods Road and Katy Freeway. The company plans to hire 1,000 employees to work in the warehouse in southeastern Waller County. Just north of Amazon's facility, Goya Foods is expanding its north American Processing Center along U.S. 90 at Woods Road. Goya expects the 324,000 square foot expansion to be complete in 2018.

Newly announced industrial parks are being planned both north and south of Interstate 10. In The 650-acre Twinwood Business Park was recently announced. Located just inside Waller County, along and south of the future Twinwood Ranch Road, MAN Diesel & Turbo will construct a 137,000-sq. ft. facility in the park. 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. Also, in May 2018, a new 150-acre industrial park named Pintail Crossing was announced just north of Fulshear's ETJ. The 2.2 million square feet of distribution space at the northwest corner of Igloo Road and Katy Freeway will be developed by Houston-based Hines. Job growth is expected to continue to grow around the Fulshear area as planned business parks continue to be developed along Interstate 10. With increased industrial interest in the Interstate 10 Corridor and continued outward growth of Houston Metro, particularly in areas to the south between FM 359 and Jordan Ranch Boulevard, employment in the area is expected to rise in future decades.

Planning Units in the Study Area

City of Fulshear: City Limits and ETJ

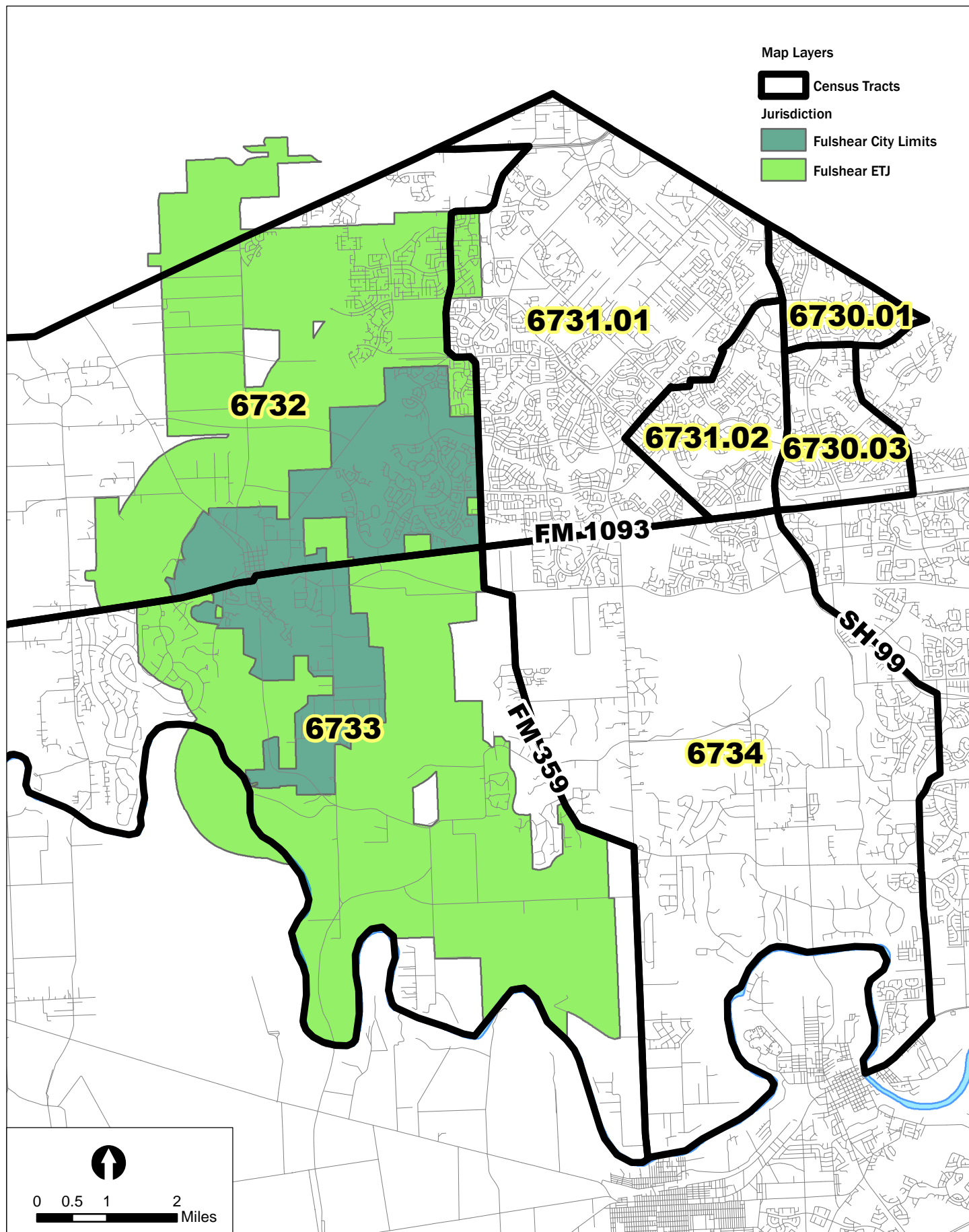


Map Layers

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

2010 Census Tract Boundaries

North Fort Bend County



Demographic Characteristics by Census Tract
2016 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	2,705	3,692	17,762	5,380	3,805	2,295	6,601
Average household size	2.94	3.38	3.43	3.08	3.14	2.68	3.19
Total Population	7,959	12,480	61,133	16,572	11,929	6,152	21,048
Under 5	4.7%	6.3%	9.4%	5.7%	11.7%	4.2%	10.7%
Ages 5-17	23.7%	28.6%	25.9%	28.6%	21.6%	16.8%	21.0%
Ages 18-24	6.4%	6.4%	5.5%	5.0%	4.4%	5.6%	5.9%
Ages 25-34	4.1%	4.8%	11.8%	4.6%	14.3%	3.6%	12.5%
Ages 35-49	22.5%	30.7%	29.4%	29.6%	26.3%	16.5%	22.7%
Ages 50-59	20.6%	14.6%	9.9%	15.1%	12.6%	19.9%	14.4%
60 Year and Over	18.0%	8.5%	8.2%	11.4%	9.1%	33.5%	12.7%
Population 25 and Over							
Bachelor's degree or higher	71.5%	71.9%	63.1%	66.9%	57.8%	55.8%	50.7%
Labor Force Over 16							
Percent Unemployed	2.8%	2.9%	2.7%	1.8%	1.8%	1.5%	3.6%
Median Household Income	\$136,948	\$154,577	\$144,336	\$129,783	\$136,703	\$139,708	\$111,011
Housing Characteristics							
Median Home Value, Owner-Occupied	\$305,200	\$309,300	\$315,900	\$291,100	\$344,500	\$446,400	\$279,900
Housing Costs > 30% of Monthly Income	21.8%	14.8%	19.7%	18.0%	20.9%	20.1%	25.1%
Owner-occupied housing units	84.9%	92.6%	84.7%	83.4%	95.6%	94.3%	94.8%
Renter-occupied housing units	15.1%	7.4%	15.3%	16.6%	4.4%	5.7%	5.2%

Residential Development Overview

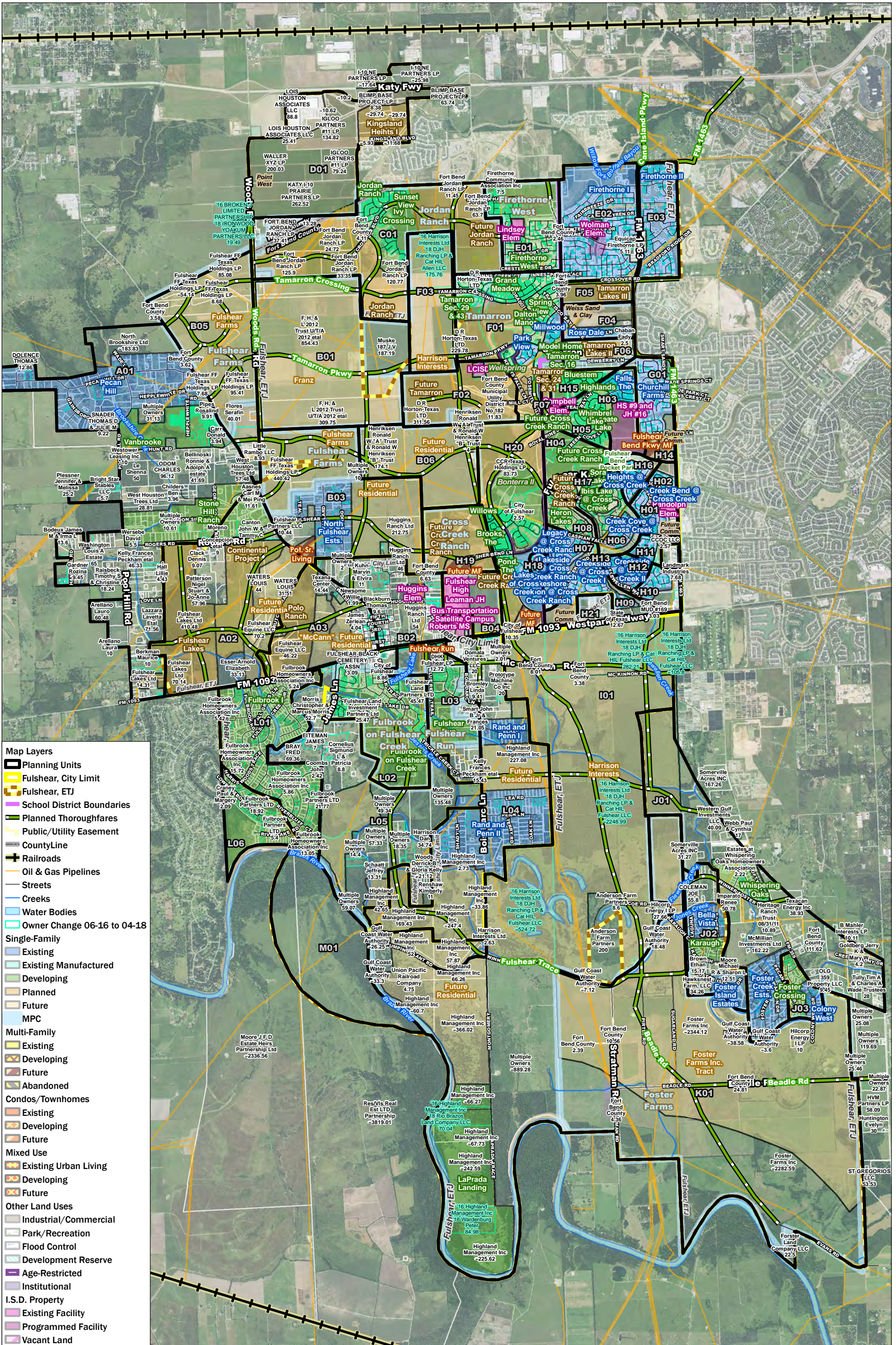
City of Fulshear



0 0.5 1 2 Miles



City of Fulshear Demographic Update - Spring 2018 - Population and Survey Analysis



Map Layers

- Planning Units
- Fulshear, City Limit
- Fulshear, ETJ
- School District Boundaries
- Planned Thoroughfares
- Public/Utility Easement
- County Line
- Railroads
- Oil & Gas Pipelines
- Streets
- Creeks
- Water Bodies
- Owner Change 06-16 to 04-18

Single-Family

- Existing
- Existing Manufactured
- Developing
- Planned
- Future
- MPC

Multi-Family

- Existing
- Developing
- Future
- Abandoned

Condos/Townhomes

- Existing
- Developing
- Future

Mixed Use

- Existing Urban Living
- Developing
- Future

Other Land Uses

- Industrial/Commercial
- Park/Recreation
- Flood Control
- Development Reserve
- Age-Restricted
- Institutional
- I.S.D. Property
- Existing Facility
- Programmed Facility
- Vacant Land

Oil and Gas Pipelines

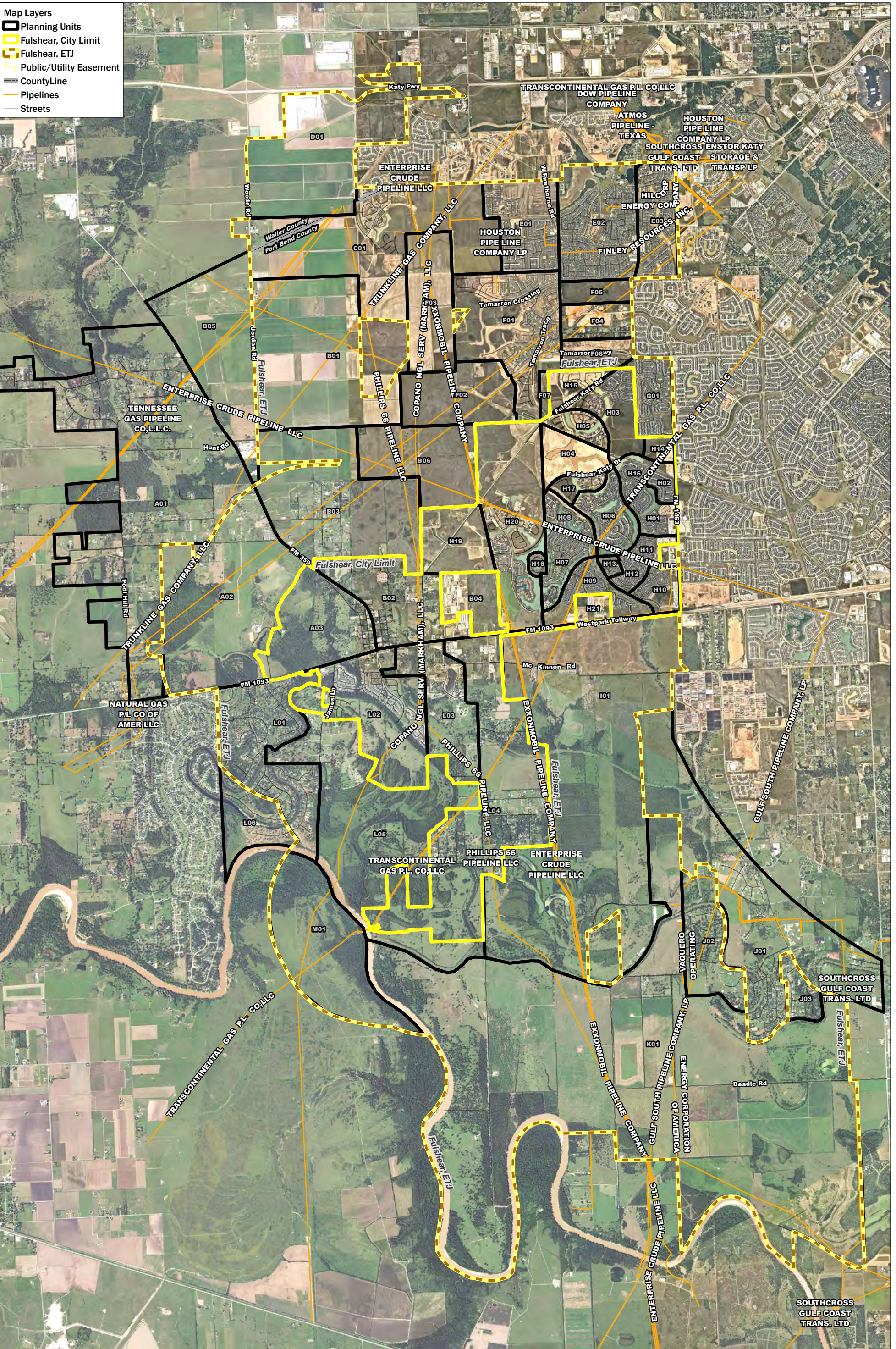
City of Fulshear



0 0.5 1 2 Miles

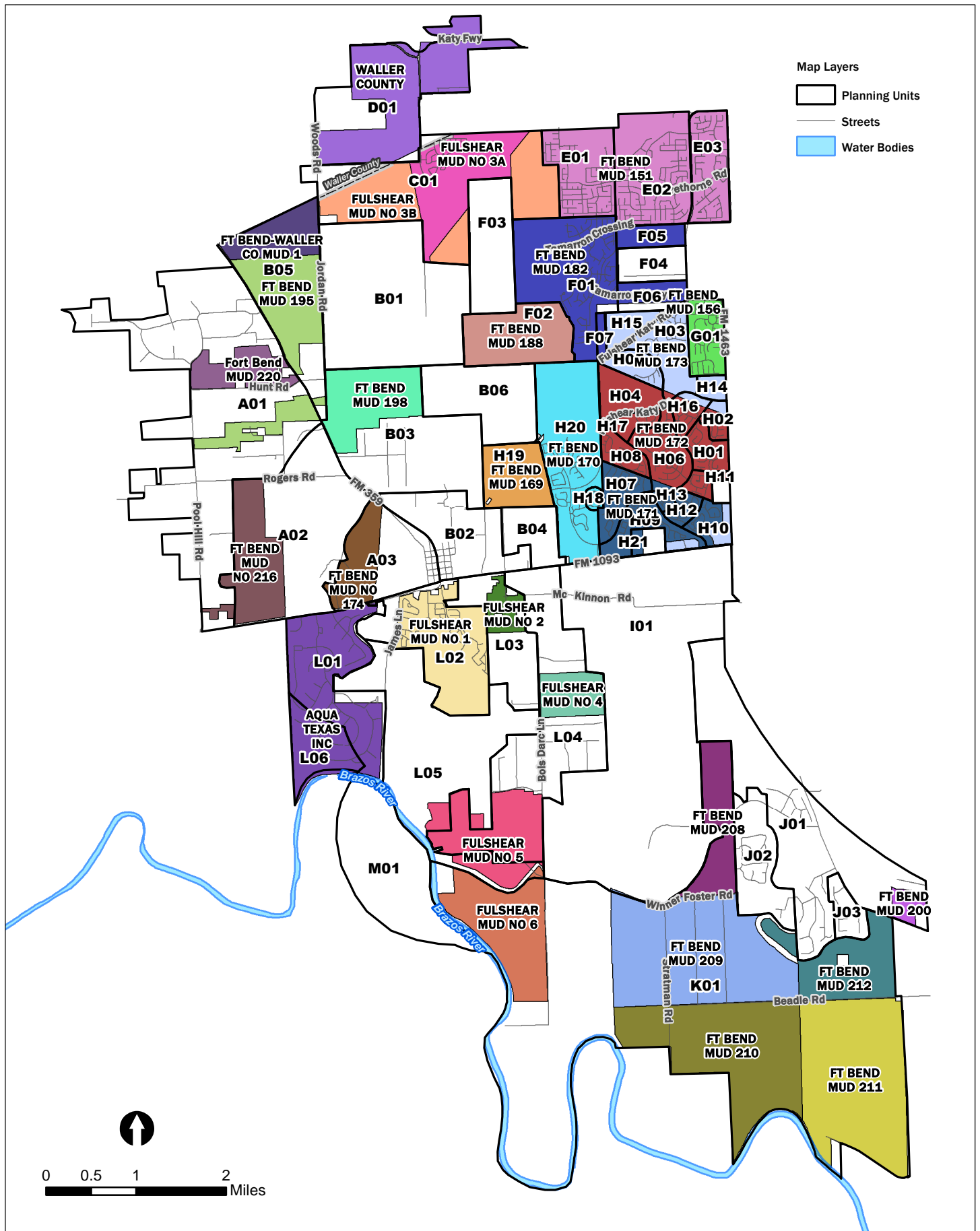


- Map Layers**
- Planning Units
 - Fulshear, City Limit
 - Fulshear, ETJ
 - Public/Utility Easement
 - CountyLine
 - Pipelines
 - Streets



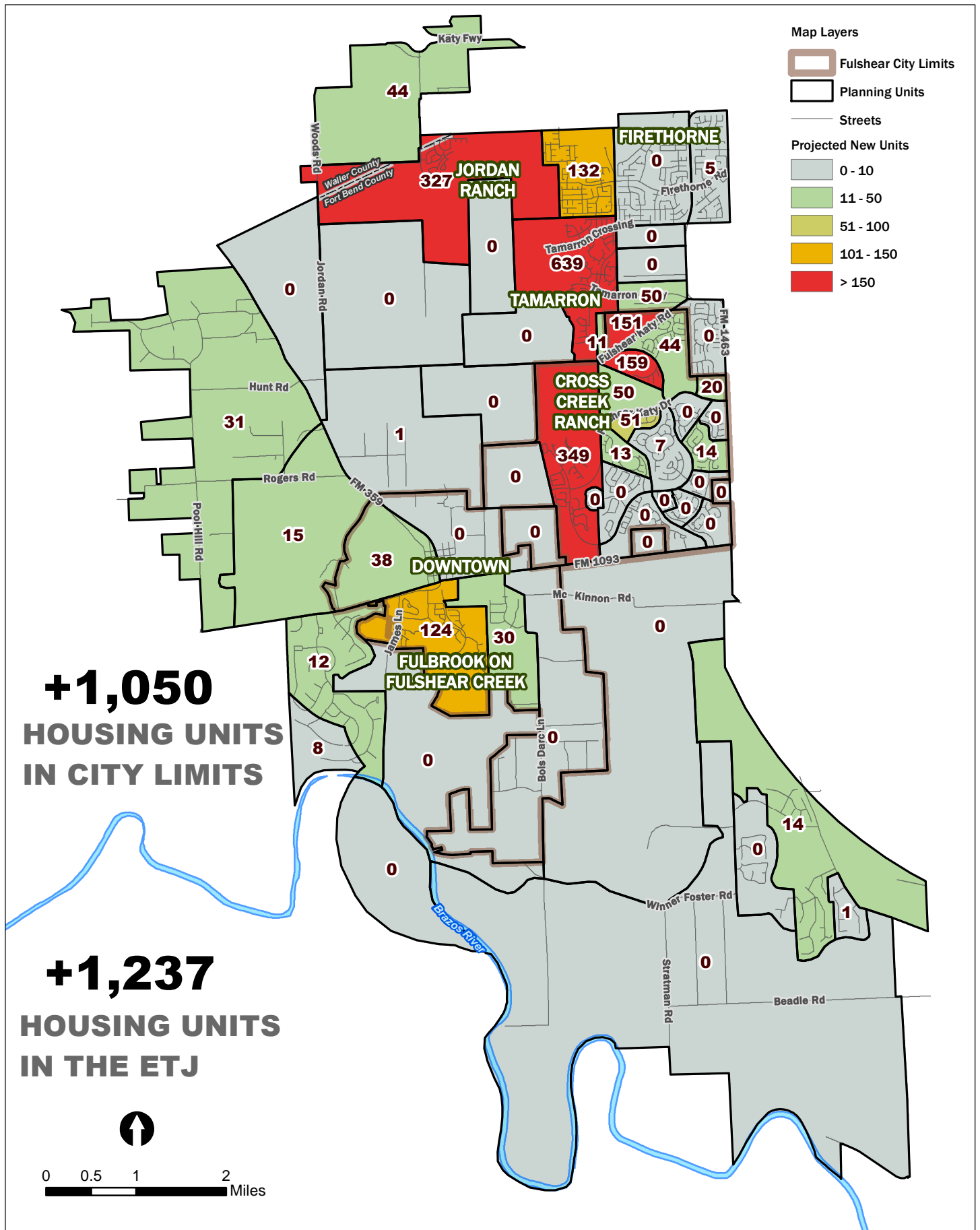
Municipal Utility Districts

City of Fulshear: City Limits and ETJ



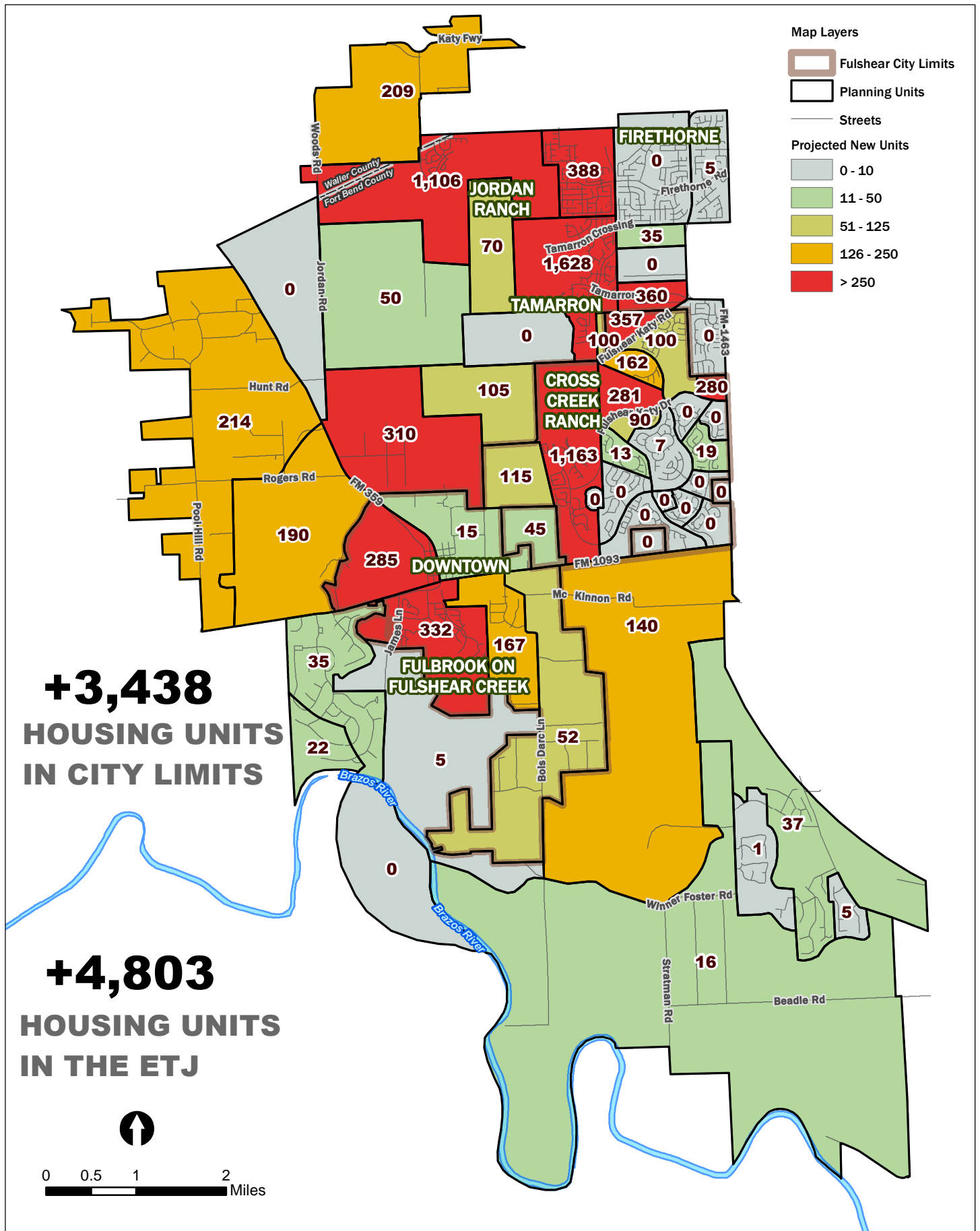
Projected New Housing Units

October 2017 to October 2019, Two Years



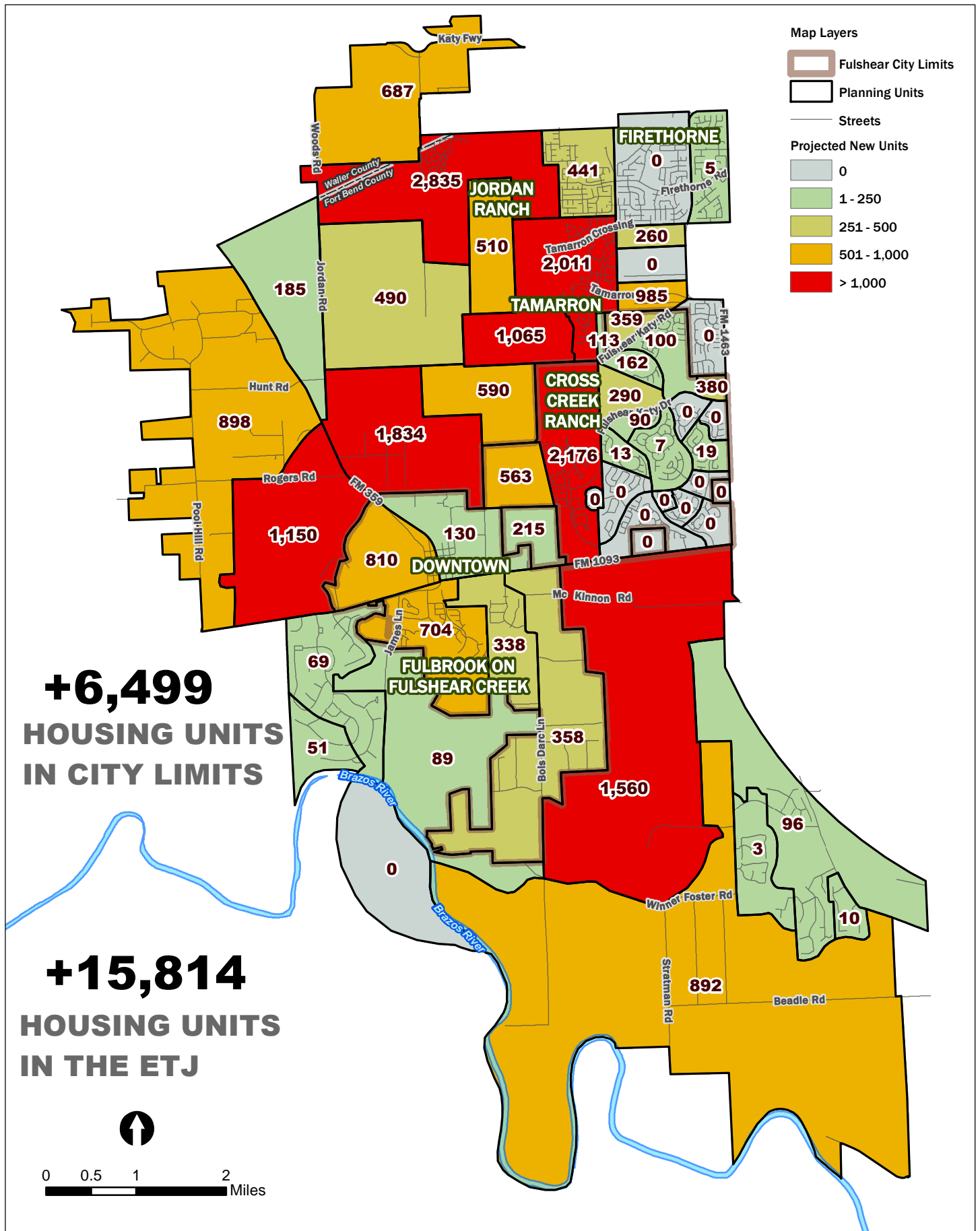
Projected New Housing Units

October 2017 to October 2022, First Five-Years



Projected New Housing Units

October 2017 to October 2027, Ten Years



PROJECTED HOUSING UNITS BY PLANNING UNIT
FULSHEAR, TEXAS



Planning Unit	Area	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
A01	X	246	252	277	317	376	460	560	684	825	984	1,144
A02	ETJ	17	17	32	72	134	207	298	444	648	903	1,167
A03	CL	63	63	101	167	253	348	448	548	653	763	873
B01	ETJ	0	0	0	0	10	50	105	185	280	385	490
B02	CL	71	71	71	71	76	86	106	126	151	176	201
B03	ETJ	48	48	49	74	165	358	608	889	1,205	1,551	1,882
B04	ETJ	0	0	0	5	20	45	75	110	145	180	215
B05	X	0	0	0	0	0	0	0	15	60	115	185
B06	ETJ	0	0	0	15	50	105	175	260	360	475	590
C01	ETJ	74	195	376	579	835	1,155	1,494	1,864	2,209	2,544	2,884
D01	ETJ	0	4	44	99	154	209	289	389	489	589	687
E01	ETJ	846	888	953	1,046	1,136	1,209	1,251	1,262	1,262	1,262	1,262
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	628	633	633	633	633	633	633	633	633	633	633
F01	ETJ	625	863	1,190	1,511	1,845	2,179	2,502	2,562	2,562	2,562	2,562
F02	ETJ	0	0	0	0	0	0	15	275	585	865	1,065
F03	ETJ	0	0	0	5	25	70	135	205	300	405	510
F04	ETJ	19	19	19	19	19	19	19	19	19	19	19
F05	ETJ	0	0	0	5	15	35	70	105	150	205	260
F06	ETJ	3	3	53	133	243	363	498	608	728	858	988
F07	ETJ	0	0	11	35	70	100	113	113	113	113	113
G01	ETJ	574	574	574	574	574	574	574	574	574	574	574
H01	CL	253	258	267	272	272	272	272	272	272	272	272
H02	CL	173	173	173	173	173	173	173	173	173	173	173
H03	CL	320	341	364	387	407	420	420	420	420	420	420
H04	CL	0	0	50	136	219	281	290	290	290	290	290
H05	CL	52	150	211	214	214	214	214	214	214	214	214
H06	CL	339	346	346	346	346	346	346	346	346	346	346
H07	CL	239	239	239	239	239	239	239	239	239	239	239
H08	CL	108	119	121	121	121	121	121	121	121	121	121
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	117	117	117	117	117	117	117	117	117	117	117
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	0	20	120	200	280	360	380	380	380	380
H15	CL	21	90	172	261	342	378	380	380	380	380	380
H16	CL	186	186	186	186	186	186	186	186	186	186	186
H17	CL	17	38	68	89	105	107	107	107	107	107	107
H18	CL	67	67	67	67	67	67	67	67	67	67	67
H19	CL	0	0	0	0	40	115	255	395	490	550	563
H20	CL	283	407	595	849	1,136	1,409	1,664	1,879	2,062	2,242	2,422
H21	ETJ	0	0	0	0	0	0	0	0	0	0	0
I01	ETJ	0	0	0	5	45	140	300	530	840	1,180	1,560
J01	X	131	137	145	152	160	168	178	189	200	212	227
J02	ETJ	60	60	60	61	61	61	62	62	62	63	63
J03	ETJ	45	45	46	48	49	50	52	52	53	54	55
K01	ETJ	0	0	0	1	6	16	52	167	356	597	892
L01	ETJ	258	263	270	278	286	293	299	306	314	320	327
L02	CL	254	304	362	427	497	570	647	727	807	883	942
L03	CL	15	28	45	64	110	182	256	303	323	340	353
L04	CL	133	133	133	133	148	185	232	286	347	415	491
L05	ETJ	11	11	11	11	11	16	23	34	54	74	100
L06	X	8	12	16	20	25	30	35	41	47	53	59
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	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
City	-	419	578	731	829	828	804	676	569	536	476
ETJ	-	415	698	888	1,177	1,501	1,755	2,006	2,293	2,470	2,487
City + ETJ	-	834	1,276	1,619	2,006	2,329	2,559	2,682	2,862	3,006	2,963
Outside ETJ	-	16	37	51	72	97	115	156	203	232	251

Projected Housing Units

Area	2017 Estimate	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
City	3,391	3,810	4,388	5,119	5,948	6,776	7,580	8,256	8,825	9,361	9,837
ETJ	4,538	4,953	5,651	6,539	7,716	9,217	10,972	12,978	15,271	17,741	20,228
City + ETJ	7,929	8,763	10,039	11,658	13,664	15,993	18,552	21,234	24,096	27,102	30,065
Outside ETJ	385	401	438	489	561	658	773	929	1,132	1,364	1,615

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Pecan Hill		Stone Hill Ranch		Vanbrooke		Single Family		Single Family		Single Family		"Continental Project"	
MPC							Single Family		Single Family		Single Family		Single Family	
Name	Pecan Hill		Stone Hill Ranch		Vanbrooke		Single Family		Single Family		Single Family		"Continental Project"	
Land Use	Single Family		Single Family		Single Family		Single Family		Single Family		Single Family		Single Family	
Development Phase	Existing		Developing		Developing		Probable		Probable		Probable		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		A02	
NEW HOUSING OCCUPANCIES:	W. off Jordan & N. of Hunt built out Jan. 2013; almost built out;		Jan. 2018: 60 Occ'd, 0 Avail., 0 UC & 25 dev'd lots LTBO; Jan. 2017: 58 Occ'd, 0 Avail., 0 UC & 27 dev'd lots LTBO; Jan. 2016: 58 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. 2018: being cleared & adding in infrastructure. Land Tejas is planning 586 lots on 245 ac. b/t 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;		Jan. 2018 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 Bellmoski Est. has 41.6 ac. all south along Hunt Rd.; all tracts developable but no known plans;		Jan. 2018: Frances Kelly has 46.3 ac., Loretta Lazzara has 71.5 ac., James Burgen has ~28 ac., Avim Sorrells newly owns 21.2 ac. all S. of Rogers Rd. & E. of Pool Hill Rd.;		Jan. 2018: North Brookshire Ltd. has 183.3 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. 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 2018–Oct 2018	1	1	4	0	0	0	6	0						
Oct 2018–Oct 2019	0	0	25	0	0	25	0							
Oct 2019–Oct 2020	0	1	37	2	0	40	0							
Oct 2020–Oct 2021	0	1	45	3	2	59	2							
Oct 2021–Oct 2022	0	0	55	7	7	84	8							
Oct 2022–Oct 2023	0	1	65	12	7	100	15							
Oct 2023–Oct 2024	0	0	75	20	9	124	23							
Oct 2024–Oct 2025	0	1	75	24	11	141	34							
Oct 2025–Oct 2026	0	1	80	26	12	159	42							
Oct 2026–Oct 2027	0	1	80	27	12	160	46							
Jan 2018–Oct 2022	1	3	166	12	9	214	10							
Oct 2022–Oct 2027	0	4	375	109	51	684	160							
Jan 2018–Oct 2027	1	7	541	121	60	898	170							
	2.20	2.65	3.05	3.00	2.95	2.95	x	2.90						

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Fulshear Lakes			"McCann and Grandes Ricos"		Fulshear Polo Ranch	
MPC							
Name	Fulshear Lakes	Fulshear Lakes					
Land Use	Single Family	Multi-Family	Single Family		Single Family	Single Family	
Development Phase	Planned	Planned	Probable		Probable	Planned	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ		Fulshear	Fulshear	
	A02	A02	A02	A02	A03	A03	A03
NEW HOUSING OCCUPANCIES:	<p>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 SWI 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. 2017: 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. 2018: L. Waters and Mason Equest Inc. 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. 2018: Gerald McCann has ~154 ac. in City Limits zoned for estate lots; interest from builders hoping to build on 6,000 sq. ft. lots is likely to become a City Council discussion in the coming years--development is likely here on at least half the McCann tract--expect anywhere from 75 to 210 lots on 86 ac. and more on the remaining acreage later on; 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. 2018: Century Land Holdings purchased and is developing 217.7 ac. to be called Polo Ranch--a 781-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 2018–Oct 2018	0	0	0	0	0	0	0
Oct 2018–Oct 2019	15	0	0	15	3	35	38
Oct 2019–Oct 2020	40	0	0	40	11	55	66
Oct 2020–Oct 2021	60	0	0	62	21	65	86
Oct 2021–Oct 2022	65	0	0	73	25	70	95
Oct 2022–Oct 2023	75	0	1	91	25	75	100
Oct 2023–Oct 2024	95	25	3	146	25	75	100
Oct 2024–Oct 2025	115	45	10	204	30	75	105
Oct 2025–Oct 2026	135	65	13	255	30	80	110
Oct 2026–Oct 2027	135	65	18	264	30	80	110
Jan 2018–Oct 2022	180	0	0	190	60	225	285
Oct 2022–Oct 2027	555	200	45	960	140	385	525
Jan 2018–Oct 2027	735	200	45	1,150	200	610	810
	2.90	1.60	2.65	x	2.85	3.05	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes									Fulshear Farms
MPC									Fulshear Farms
Name	"F H, & L 2012" Tract	"Muske 187 J V"		Downtown District		North Fulshear Estates		Potential MF/Mixed Use	Fulshear Farms
Land Use	Single Family	Single Family		Single Family		Single Family		Multi-Family	Single Family
Development Phase	Probable	Probable		Probable		Existing		Probable	Planned
Municipality	Fulshear ETJ	Fort Bend County		Fulshear		Fulshear ETJ		Fulshear ETJ	Fort Bend County
	B01	B01	B01	B02	B02	B03	B03	B03	B03
NEW HOUSING OCCUPANCIES:	Jan. 2018: Franz has 854 & 309 ac. E. along Jordan Rd. with no intention of developing in the near future;	Jan. 2018: Patricia Muske has 187.2 ac.; 2015: (listed for sale but no good access currently. Susan Merke is among those marketing it) Muske family did not have previous interest in developing & was excluded from recent ETJ expansion		Jan. 2018: Huggins Ranch Ltd. has 46 & 54 ac. all E. of FM 359; could potentially have access through smaller tracts to FM 1093, long-term. Jordan Ranch Blvd. is planned through the east side of the larger parcels;		slow to build out Jan. 2016: not much activity; expect 1 new home every 2 yr Jan. 2015: not much activity; expect 1 new home every 2 yr Jan. 2014: no activity currently; expect 1 new home every 2 yr	Jan. 2018: Lou Waters has 13 & 12 ac. which will likely be an apt./senior living/comm.; Rogers Rd. at FM 359 is a planned commercial node in the City of Fulshear Livable Centers Plan; expect MF development here in the future; (Lublee=was an interested dev for tax credits in 2016) James Chemplanikal =27 ac. Serafin Flores=23 & 25 & 17 ac. later demand for MF, & strong comm. demand	Jan. 2018: Fulshear FF Texas Holdings LP (Johnson Dev.) has purchased 1,244 ac. in two tracts E. along FM 359; 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;	
Jan 2018–Oct 2018	0	0	0	0	0	0	0	0	0
Oct 2018–Oct 2019	0	0	0	0	0	1	0	0	0
Oct 2019–Oct 2020	0	0	0	0	0	0	0	0	25
Oct 2020–Oct 2021	0	10	10	5	5	1	0	0	75
Oct 2021–Oct 2022	0	40	40	10	10	1	25	25	135
Oct 2022–Oct 2023	0	55	55	20	20	0	50	50	160
Oct 2023–Oct 2024	5	75	80	20	20	1	50	50	180
Oct 2024–Oct 2025	15	80	95	25	25	1	75	75	170
Oct 2025–Oct 2026	25	80	105	25	25	1	75	75	200
Oct 2026–Oct 2027	25	80	105	25	25	1	75	75	185
Jan 2018–Oct 2022	0	50	50	15	15	3	25	25	235
Oct 2022–Oct 2027	70	370	440	115	115	4	325	325	895
Jan 2018–Oct 2027	70	420	490	130	130	7	350	350	1,130
	3.10	3.15	x	2.30	x	2.50	1.65	1.65	3.20

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes					Fulshear Farms				Jordan Ranch
MPC					Fulshear Farms				Sunset View
Name					Single Family				Single Family
Land Use	Single Family		Single Family		Planned			Single Family	Developing
Development Phase	Probable		Probable		Fort Bend County			Probable	Fulshear ETJ
Municipality	Fulshear ETJ		Fulshear ETJ					Fulshear ETJ	
	B03	B03	B04	B04	B05	B05	B06	B06	C01
NEW HOUSING OCCUPANCIES:									
Jan. 2018: Huggins Ranch Ltd. has 212.7 and 193.5 all E. of FM 359; could potentially have access through smaller tracts to FM 1093; long-term, Jordan Ranch Blvd. is planned through the east side of the larger parcels;			Jan. 2018: GM Equity Group has 121.1 ac., Ginter Family 2015, by Cross Creek have planned for all commercial uses; but, this location will still see demand for MF & TH dev.; Texas Heritage Pkwy. is planned on eastern side of parcel; much speculation in land to the N. off FM 1093; 2014: GM Equity Grp. did not donate to Texas Heritage Pkwy. project;		Jan. 2018: Fulshear FF Texas Holdings LP (Johnson Dev.) has purchased 1,244 ac. in two tracts E. along FM 359; 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;		Jan. 2018: 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;		273 total lots in this section 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;
Jan 2018–Oct 2018	0	0	0	0	0	0	0	0	55
Oct 2018–Oct 2019	0	1	0	0	0	0	0	0	81
Oct 2019–Oct 2020	0	25	5	5	0	0	15	15	38
Oct 2020–Oct 2021	15	91	15	15	0	0	35	35	3
Oct 2021–Oct 2022	32	193	25	25	0	0	55	55	0
Oct 2022–Oct 2023	40	250	30	30	0	0	70	70	0
Oct 2023–Oct 2024	50	281	35	35	15	15	85	85	0
Oct 2024–Oct 2025	70	316	35	35	45	45	100	100	0
Oct 2025–Oct 2026	70	346	35	35	55	55	115	115	0
Oct 2026–Oct 2027	70	331	35	35	70	70	115	115	0
Jan 2018–Oct 2022	47	310	45	45	0	0	105	105	177
Oct 2022–Oct 2027	300	1,524	170	170	185	185	485	485	0
Jan 2018–Oct 2027	347	1,834	215	215	185	185	590	590	177
	3.15	x	2.15	x	3.20	x	3.20	x	3.23

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Jordan Ranch	Jordan Ranch	Jordan Ranch	
MPC	Jordan Ranch	Jordan Ranch	Jordan Ranch	
Name	Ivy Crossing	Future Jordan Ranch	Jordan Ranch	
Land Use	Single Family	Single Family	Multi-Family	
Development Phase	Developing	Planned	Planned	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	
	C01	C01	C01	C01
NEW HOUSING OCCUPANCIES:	<p>397 total lots in this section</p> <p>Jan. 2018: 14 Occ'd, 2 Avail., 5 UC & 3 dev'd lots LTBO; developer has plans for 373 future lots to complete this section with streets & infrastructure going in now; builders: J.Patrick, Highland, Westin, Perry, Newmark, Plantation & David Weekley Homes</p>	<p>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. 2018: 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 prior along future Texas Heritage Pkwy.</p>	
Jan 2018–Oct 2018	51	15	0	121
Oct 2018–Oct 2019	80	20	0	181
Oct 2019–Oct 2020	95	70	0	203
Oct 2020–Oct 2021	88	165	0	256
Oct 2021–Oct 2022	65	230	25	320
Oct 2022–Oct 2023	4	300	35	339
Oct 2023–Oct 2024	0	305	65	370
Oct 2024–Oct 2025	0	270	75	345
Oct 2025–Oct 2026	0	250	85	335
Oct 2026–Oct 2027	0	240	100	340
Jan 2018–Oct 2022	379	500	25	1,081
Oct 2022–Oct 2027	4	1,365	360	1,729
Jan 2018–Oct 2027	383	1,865	385	2,810
	3.23	3.23	1.92	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes								
MPC								
Name	Point West	Kingsland Heights		Firethorne West		Firethorne		Firethorne
Land Use	Multi-Family	Single Family		Single Family		Single Family		Single Family
Development Phase	Probable	Planned		Developing		Existing		Developing
Municipality	Fulshear ETJ	Fulshear ETJ		Fulshear ETJ		Fulshear ETJ		Fulshear ETJ
	D01	D01	D01	E01	E01	E02	E02	E03
	June, 2018: 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	May 2018: Starlight Homes is developing 462 SF homes in the WRID 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.		Jefferson Development (Wayne Meyer-construction mgr.); 1,345 total lots at completion Jan. 2018: 929 Occ'd, 16 Avail., 10 UC & 21 dev'd lots LTBO; developer has concept plans for 369 future lots; builders: Ravenna, Saratoga, Highland, Plantation, Ashton Woods Homes; Jan. 2017: 829 Occ'd, 26 Avail., 19 UC & 98 dev'd lots LTBO; developer has concept plans for 373 future lots; Jan. 2016: 654 Occ'd, 55 Avail., 29 UC & 214 dev'd lots LTBO; developer has concept plans for 476 future lots; Jan. 2015: 553 Occ'd, 33 Avail., 48 UC & 112 dev'd lots LTBO; developer has concept plans for 632 fut. lots; Jan. 2014: 322 Occ'd, 21 Avail., 44 UC & 76 dev'd lots LTBO; developer has prelim plans for 895 fut. lots;		built out		Oct. 2017: 628 Occ'd, 0 Avail., 5 UC & 0 dev'd lots LTBO; Almost built out; Sept. 2016: 582 Occ'd, 18 Avail., 13 UC & 20 dev'd lots LTBO;
NEW HOUSING OCCUPANCIES:								
Jan 2018–Oct 2018	0	4	4	42	42	0	0	5
Oct 2018–Oct 2019	0	40	40	65	65	0	0	0
Oct 2019–Oct 2020	0	55	55	93	93	0	0	0
Oct 2020–Oct 2021	0	55	55	90	90	0	0	0
Oct 2021–Oct 2022	0	55	55	73	73	0	0	0
Oct 2022–Oct 2023	25	55	80	42	42	0	0	0
Oct 2023–Oct 2024	50	50	100	11	11	0	0	0
Oct 2024–Oct 2025	50	50	100	0	0	0	0	0
Oct 2025–Oct 2026	50	50	100	0	0	0	0	0
Oct 2026–Oct 2027	50	48	98	0	0	0	0	0
Jan 2018–Oct 2022	0	209	209	363	363	0	0	5
Oct 2022–Oct 2027	225	253	478	53	53	0	0	0
Jan 2018–Oct 2027	225	462	687	416	416	0	0	5
	1.80	3.20	x	3.20	x	3.30	x	3.25

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes		Tamarron	Tamarron	Tamarron	Tamarron	Tamarron
MPC		Tamarron	Tamarron	Tamarron	Tamarron	Tamarron
Name		Dalton Manor	Grand Meadow	Millwood	model home park	Park View
Land Use		Single Family	Single Family	Single Family	Single Family	Single Family
Development Phase		Developing	Developing	Developing	Developing	Existing
Municipality		Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ
	E03	F01	F01	F01	F01	F01
		100 total lots Jan. 2018: 39 Occ'd, 2 Avail., 5 UC & 54 dev'd lots LTBO; builder: Emerald Homes Jan. 2017: 36 Occ'd, 2 Avail., 0 UC & 62 dev'd lots LTBO; Jan. 2016: 17 Occ'd, 10 Avail., 5 UC & 68 dev'd lots LTBO;	642 total lots 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;	111 total lots 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. 2018: 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. 2018: built out; almost 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;
NEW HOUSING OCCUPANCIES:						
Jan 2018-Oct 2018	5	5	130	9	1	0
Oct 2018-Oct 2019	0	13	140	0	3	0
Oct 2019-Oct 2020	0	16	110	0	4	0
Oct 2020-Oct 2021	0	14	10	0	3	0
Oct 2021-Oct 2022	0	11	0	0	2	0
Oct 2022-Oct 2023	0	2	0	0	1	0
Oct 2023-Oct 2024	0	0	0	0	0	0
Oct 2024-Oct 2025	0	0	0	0	0	0
Oct 2025-Oct 2026	0	0	0	0	0	0
Oct 2026-Oct 2027	0	0	0	0	0	0
Jan 2018-Oct 2022	5	59	390	9	13	0
Oct 2022-Oct 2027	0	2	0	0	1	0
Jan 2018-Oct 2027	5	61	390	9	14	0
	X	3.20	3.20	3.22	3.25	3.22

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Tamarron	Tamarron	Tamarron	Tamarron	Tamarron	
MPC	Tamarron	Tamarron	Tamarron	Tamarron	Tamarron	
Name	Spring View	Section 16	Sections 29 & 43	Future Land	Wellspring	
Land Use	Single Family	Single Family	Single Family	Single Family	Single Family Age-Restricted	
Development Phase	Developing	Developing	Developing	Planned	Developing	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ	
	F01	F01	F01	F01	F01	F01
NEW HOUSING OCCUPANCIES:	206 total lots 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;	Jan. 2018: Sec. 16 platted for 74 lots; Jan. 2017: infrastructure is ready	Jan. 2018: Sec. 29 platted for 103 lots in July 2017 and Sec. 43 platted for 125 lots in Aug. 2017 (228 total lots); D.R. Horton plans on building homes in the Spring of 2018 in these sections	Jan. 2018: 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 LOISD elem. site are also progressing; approximately 740 additional acres remain unplatted in LOISD that could have upwards of 2,146 lots (~995 lots in PU F01);	55+ development 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;	
Jan 2018–Oct 2018	39	24	8	5	17	238
Oct 2018–Oct 2019	36	32	40	40	23	327
Oct 2019–Oct 2020	2	18	50	100	21	321
Oct 2020–Oct 2021	0	0	50	240	17	334
Oct 2021–Oct 2022	0	0	40	270	11	334
Oct 2022–Oct 2023	0	0	40	280	0	323
Oct 2023–Oct 2024	0	0	0	60	0	60
Oct 2024–Oct 2025	0	0	0	0	0	0
Oct 2025–Oct 2026	0	0	0	0	0	0
Oct 2026–Oct 2027	0	0	0	0	0	0
Jan 2018–Oct 2022	77	74	188	655	89	1,554
Oct 2022–Oct 2027	0	0	40	340	0	383
Jan 2018–Oct 2027	77	74	228	995	89	1,937
	3.22	3.22	3.22	3.20	1.75	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



City of Fulshear Demographic Update - Spring 2018 - Population and Survey Analysts

PASA Notes	MPC	Name	Land Use	Development Phase	Municipality	
	Tamarron	Future Land	Single Family	Planned	Fulshear ETJ	
		"Harrison Interests"	Single Family	Probable	Fulshear ETJ	
		Industrial	Existing		Fulshear ETJ	
		Tamarron	Single Family	Probable	Fulshear ETJ	
NEW HOUSING OCCUPANCIES:						
	F02	F03	F04	F05		
Jan. 2018: 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 740 additional acres remain unplatted in LCISD that could have upwards of 2,146 lots (~995 lots in PU F01);		Jan. 2018: Harrison Interests (Wm. & uncle: Dan Harrison) have 175.7 & ~286 ac. adj. to Tamarron; uncle and nephew had no final decision as to dev. time frame or sell-off (2015); City believed parcel was in negotiations (but fell through) w/D.R. Horton; Tamarron Crossing is now built 1,200 ft. to the property line so access would be available quickly; previously owned by Marhaba Partners and both tracts LCISD & Royal ISD Jan. 2016: F. Fargo states DR Horton has option to buy;	Aug. 2016: Weiss Land & Dev. has 105.3 ac.; W. off FM 1463; currently operating as a sand pit/dirt-moving operation; long-term potential for SF/comm./MF	DR Horton's 90 & 117 ac. in 2 sites in KISD (but have ~4,200 SF tot. on ~747 ac. in Lamar C.I.S.D.) & small SF dev. in Katy I.S.D.; initial plan shows 60' lots south of major entry roadway (SF-44, SF-45 and SF-46) - PASA expects ~532 SF lots or 2.7 lots/ac. on 197 ac.; DR Horton's Land Dept. (Jonathan Woodruff) is the contact for land plans: (was earlier owned by Bob Shelton Dev. Co. of Denton w/partner; & even earlier, was Evelyn Moore Wendt's; Wm. Harrison had also owned (w/an uncle) the previously owned Bruce Harrison tracts of 119 & 59 ac.; 2014: clearing the land adjacent to 1463 for entrance; Thomas & Rose tracts & the 106 + 7 ac. & Weiss' parcels of 108 ac. still remain for excavation; could expect one to two MF dev's near entry to Tamarron if reduce SF on 20+ ac. by ~54 lots;		
NEW HOUSING OCCUPANCIES:						
Jan 2018–Oct 2018	0	0	0	0	0	
Oct 2018–Oct 2019	0	0	0	0	0	
Oct 2019–Oct 2020	0	0	5	0	5	
Oct 2020–Oct 2021	0	0	20	0	10	
Oct 2021–Oct 2022	0	0	45	0	20	
Oct 2022–Oct 2023	15	15	65	0	35	
Oct 2023–Oct 2024	260	260	70	0	35	
Oct 2024–Oct 2025	310	310	95	0	45	
Oct 2025–Oct 2026	280	280	105	0	55	
Oct 2026–Oct 2027	200	200	105	0	55	
Jan 2018–Oct 2022	0	0	70	0	35	
Oct 2022–Oct 2027	1,065	1,065	440	0	225	
Jan 2018–Oct 2027	1,065	1,065	510	0	260	
	3.20	x	3.20	x	3.20	

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Tamarron			Tamarron		Churchill Farms		Cross Creek	
MPC	Tamarron			Tamarron		Churchill Farms		Cross Creek	
Name	Tamarron			Tamarron		Churchill Farms		Cross Creek	
Land Use	Single Family			Mixed Use		Single Family		Single Family	
Development Phase	Probable			Probable		Existing		Existing	
Municipality	Fulshear ETJ			Fulshear ETJ		Fulshear ETJ		Fulshear	
	F06	F06	F06	F06	F07	F07	G01	G01	H01
NEW HOUSING OCCUPANCIES:									
DR Horton's 90 & 117 ac. in 2 sites in KISD (but have ~4,200 SF tot. on ~1,250 ac. in Lamar C.I.S.D.) & small SF dev. in Katy I.S.D.; initial plan shows 60' lots south of major entry roadway (SF-44, SF-45 and SF-46) - PASA expects ~532 SF lots or 2.7 lots/ac. on 197 ac.; DR Horton's Land Dept. (Jonathan Woodruff) is the contact for land plans; was earlier owned by Bob Shelton Dev. Co. of Denton w/partner; & even earlier, was Evelyn Moore Wendt's; Wm. Harrison had also owned (w/an uncle) the previously owned Bruce Harrison tracts of 119 & 59 ac.; 2014; clearing the land adjacent to 1463 for entrance; Thomas & Rose tracts & the 106 + 7 ac. & Weises' parcels of 108 ac. still remain for excavation; could expect one to two MF dev's near entry to Tamarron if reduce SF on 20+ ac. by ~54 lots;		June 2018: a mixed use development is likely to be built along the west side of FM 1463; MF or THs are possible with some retail potential; dev. agreement with City allows for 700 MF units	2018: Darrmar Corp. = 42.3 ac.;		Oct. 2017: Tamarron "silver" by Cross Creek; sec. 24=51 and sec. 31=62 lots		built out	Oct. 2017: almost built out, except model home section, w/ 12 Available models & 7 deved lots LT50; Highland, Newmark, Lennar, Trendmaker, Perry & Village Bldrs	
Jan 2018–Oct 2018	0	0	0	0	0	0	0	0	5
Oct 2018–Oct 2019	0	50	0	50	11	11	0	0	9
Oct 2019–Oct 2020	5	75	0	80	24	24	0	0	5
Oct 2020–Oct 2021	10	100	0	110	35	35	0	0	0
Oct 2021–Oct 2022	20	100	0	120	30	30	0	0	0
Oct 2022–Oct 2023	35	100	0	135	13	13	0	0	0
Oct 2023–Oct 2024	35	75	0	110	0	0	0	0	0
Oct 2024–Oct 2025	45	75	0	120	0	0	0	0	0
Oct 2025–Oct 2026	55	75	0	130	0	0	0	0	0
Oct 2026–Oct 2027	55	75	0	130	0	0	0	0	0
Jan 2018–Oct 2022	35	325	0	360	100	100	0	0	19
Oct 2022–Oct 2027	225	400	0	625	13	13	0	0	0
Jan 2018–Oct 2027	260	725	0	985	113	113	0	0	19
	3.20	1.95	3.20	x	3.20	x	3.30	x	3.30

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek	
MPC	Creek Bend		Highlands		The Falls		Cross Creek		Cross Creek	
Name	Creek Bend		Highlands		The Falls		Cross Creek		Cross Creek	
Land Use	Single Family		Single Family		Single Family		Single Family		Single Family	
Development Phase	Existing		Developing		Developing		Planned		Planned	
Municipality	Fulshear		Fulshear		Fulshear		Fulshear		Fulshear	
	H01	H02	H02	H03	H03	H03	H04	H04	H05	H05
NEW HOUSING OCCUPANCIES:		built out		Oct. 2017: 44 Occ'd, 4 Avail., 14 UC & 14 dev'd lots LTBO; has plans for 47 future lots in this area; Sept. 2016: 8 Occ'd, 14 Avail., 2 UC & 52 dev'd lots LTBO; has plans for 54 future lots in this area;	April 2017: 276 Occ'd, 0 Avail., 0 UC & 2 dev'd lots LTBO; Sept. 2016: 164 Occ'd, 28 Avail., 46 UC & 40 dev'd lots LTBO;		Oct. 2017: being leveled - adding in streets & infrastructure; plans for 356 SF lots on remaining tracts in this PU		Oct. 2017: being leveled - adding in streets & infrastructure; plans for 66 SF lots on remaining tracts in this PU	Oct. 2017: 52 Occ'd, 9 Avail., 10 UC & 5 dev'd lots LTBO; Sept. 2016: 6 Occ'd, 5 Avail., 11 UC & 54 dev'd lots LTBO;
Jan 2018–Oct 2018	5	0	0	19	2	21	0	0	39	24
Oct 2018–Oct 2019	9	0	0	23	0	23	50	50	27	2
Oct 2019–Oct 2020	5	0	0	23	0	23	86	86	0	0
Oct 2020–Oct 2021	0	0	0	20	0	20	83	83	0	0
Oct 2021–Oct 2022	0	0	0	13	0	13	62	62	0	0
Oct 2022–Oct 2023	0	0	0	0	0	0	9	9	0	0
Oct 2023–Oct 2024	0	0	0	0	0	0	0	0	0	0
Oct 2024–Oct 2025	0	0	0	0	0	0	0	0	0	0
Oct 2025–Oct 2026	0	0	0	0	0	0	0	0	0	0
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0
Jan 2018–Oct 2022	19	0	0	98	2	100	281	281	66	26
Oct 2022–Oct 2027	0	0	0	0	0	0	9	9	0	0
Jan 2018–Oct 2027	19	0	0	98	2	100	290	290	66	26
	x	3.30	x	3.40	3.40	x	3.40	x	3.40	3.35

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek	
MPC	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek	
Name	Whimbrel Lake		Creek Cove @ Cross Creek		Ibis Lake		Lake Shore Lagoon		Lakeside/Legacy	
Land Use	Single Family		Single Family		Single Family		Single Family		Single Family	
Development Phase	Developing		Existing		Developing		Existing		Existing	
Municipality	Fulshear		Fulshear		Fulshear		Fulshear		Fulshear	
	H05	H05	H06	H06	H06	H07	H07	H07	H08	H08
	Oct. 2017: 18 Occ'd, 7 Avail., 13 UC & 50 dev'd lots LTBO;		built out		Oct. 2017: 223 Occ'd, 2 Avail., 4 UC & 1 dev'd lots LTBO; Sept. 2016: 184 Occ'd, 13 Avail., 11 UC & 22 dev'd lots LTBO;		built out		built out	
									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;	
NEW HOUSING OCCUPANCIES:										
Jan 2018–Oct 2018	35	98	0	7	7	0	0	0	11	11
Oct 2018–Oct 2019	32	61	0	0	0	0	0	0	2	2
Oct 2019–Oct 2020	3	3	0	0	0	0	0	0	0	0
Oct 2020–Oct 2021	0	0	0	0	0	0	0	0	0	0
Oct 2021–Oct 2022	0	0	0	0	0	0	0	0	0	0
Oct 2022–Oct 2023	0	0	0	0	0	0	0	0	0	0
Oct 2023–Oct 2024	0	0	0	0	0	0	0	0	0	0
Oct 2024–Oct 2025	0	0	0	0	0	0	0	0	0	0
Oct 2025–Oct 2026	0	0	0	0	0	0	0	0	0	0
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0
Jan 2018–Oct 2022	70	162	0	7	7	0	0	0	13	13
Oct 2022–Oct 2027	0	0	0	0	0	0	0	0	0	0
Jan 2018–Oct 2027	70	162	0	7	7	0	0	0	13	13
	3.35	x	3.35	3.35	x	3.35	3.35	x	3.35	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Cross Creek Creekside at Cross Creek I		Cross Creek Creekside at Cross Creek II			Cross Creek Creekside at Cross Creek II		Cross Creek Creekside at Cross Creek II		Cross Creek Creekside at Cross Creek II		Cross Creek Park Lane Fulshear		
MPC	Cross Creek		Cross Creek			Cross Creek		Cross Creek		Cross Creek		Cross Creek		
Name	Creekside at Cross Creek I		Creekside at Cross Creek II			Creekside at Cross Creek II		Creekside at Cross Creek II		Creekside at Cross Creek II		Park Lane Fulshear		
Land Use	Single Family		Single Family			Single Family		Single Family		Single Family		Multi-Family		
Development Phase	Existing		Existing			Existing		Existing		Existing		Developing		
Municipality	Fulshear		Fulshear			Fulshear		Fulshear		Fulshear		Fulshear		
	H09	H09	H10	H10	H10	H10	H11	H11	H12	H12	H13	H13	H14	H14
	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		built out		Aug. 2017: Judwin Properties will be developing 380 units (costar) (CCR 21 LLC 21.6 ac. parcel) (was earlier considered for 442 units)	
NEW HOUSING OCCUPANCIES:														
Jan 2018–Oct 2018	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Oct 2018–Oct 2019	0	0	0	0	0	0	0	0	0	0	0	0	20	20
Oct 2019–Oct 2020	0	0	0	0	0	0	0	0	0	0	0	0	100	100
Oct 2020–Oct 2021	0	0	0	0	0	0	0	0	0	0	0	0	80	80
Oct 2021–Oct 2022	0	0	0	0	0	0	0	0	0	0	0	0	80	80
Oct 2022–Oct 2023	0	0	0	0	0	0	0	0	0	0	0	0	80	80
Oct 2023–Oct 2024	0	0	0	0	0	0	0	0	0	0	0	0	20	20
Oct 2024–Oct 2025	0	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	0
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Jan 2018–Oct 2022	0	0	0	0	0	0	0	0	0	0	0	0	280	280
Oct 2022–Oct 2027	0	0	0	0	0	0	0	0	0	0	0	0	100	100
Jan 2018–Oct 2027	0	0	0	0	0	0	0	0	0	0	0	0	380	380
	3.20	x	3.25	1.95	1.95	x	3.20	x	3.20	x	3.20	x	2.14	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek Ranch		Cross Creek Ranch	
MPC	Cross Creek		Cross Creek		Cross Creek		Cross Creek		Cross Creek Ranch		Cross Creek Ranch	
Name	Bluestem		Heights		Cross Creek		Sora Lake		Lakes of Cross Creek		Future Cross Creek Ranch	
Land Use	Single Family		Single Family		Single Family		Single Family		Single Family		Single Family	
Development Phase	Developing		Existing		Developing		Developing		Existing		Planned	
Municipality	Fulshear		Fulshear		Fulshear		Fulshear		Fulshear		Fulshear	
	H15	H15	H16	H16	H17	H17	H17	H17	H18	H18	H19	H19
NEW HOUSING OCCUPANCIES:												
	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. 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. 2017: 17 Occ'd, 2 Avail., 4 UC & 27 dev'd lots LTBO; builders: Avant!, Darling, Trendmaker & Partners in Building		built out		Jan. 2018: 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	
Jan 2018–Oct 2018	69	69	0	0	3	18	21	0	0	0	0	0
Oct 2018–Oct 2019	82	82	0	0	17	13	30	0	0	0	0	0
Oct 2019–Oct 2020	89	89	0	0	19	2	21	0	0	0	0	0
Oct 2020–Oct 2021	81	81	0	0	16	0	16	0	0	0	40	40
Oct 2021–Oct 2022	36	36	0	0	2	0	2	0	0	0	75	75
Oct 2022–Oct 2023	2	2	0	0	0	0	0	0	0	0	140	140
Oct 2023–Oct 2024	0	0	0	0	0	0	0	0	0	0	140	140
Oct 2024–Oct 2025	0	0	0	0	0	0	0	0	0	0	95	95
Oct 2025–Oct 2026	0	0	0	0	0	0	0	0	0	0	60	60
Oct 2026–Oct 2027	0	0	0	0	0	0	0	0	0	0	13	13
Jan 2018–Oct 2022	357	357	0	0	57	33	90	0	0	0	115	115
Oct 2022–Oct 2027	2	2	0	0	0	0	0	0	0	0	448	448
Jan 2018–Oct 2027	359	359	0	0	57	33	90	0	0	0	563	563
	3.40	x	3.30	x	3.40	3.40	x	2.15	x	2.95	x	

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch
MPC	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch	Cross Creek Ranch
Name	Bonterra	Future Cross Creek Ranch	Future MF	Lakes of Cross Creek	The Brooks	The Pond
Land Use	Single Family Age-Restricted	Single Family	Multi-Family	Single Family	Single Family	Single Family
Development Phase	Developing	Planned	Planned	Developing	Developing	Developing
Municipality	Fulshear	Fulshear	Fulshear	Fulshear	Fulshear	Fulshear
	H2O	H2O	H2O	H2O	H2O	H2O
NEW HOUSING OCCUPANCIES:	concept plan shows 738 total lots 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. 2018: Future phases of Cross Creek Ranch N. of Bonterra will consist of 633 lots; expect build out of these sections to happen quickly due to new schools and future Texas Heritage Pkwy.; Willows Sec. 2 has been planned for 64 townhomes and The Brooks Sec. 3 has been planned for 146 lots in Sept. 2017;	Jan. 2018: Up to 1,500 MF units are allowed in the entire development w/ the dev. Agreement; 1,120 more units can be built in LOSD; City suggests that a new property may be built along FM 1093 W. of main entrance; another property is planned for MF along future Fulshear Bend	3 sections = 136 lots 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 Jan. 2018: 93 Occ'd, 8 Avail., 11 UC & 33 dev'd lots LTBO; builders: Perry & Cheesmar 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 Jan. 2018: 62 Occ'd, 4 Avail., 2 UC & 0 dev'd lots LTBO; builders: Silterle & 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;
Jan 2018–Oct 2018	31	25	0	2	31	6
Oct 2018–Oct 2019	45	80	0	0	18	0
Oct 2019–Oct 2020	59	100	50	0	3	0
Oct 2020–Oct 2021	67	145	50	0	0	0
Oct 2021–Oct 2022	76	120	75	0	0	0
Oct 2022–Oct 2023	80	100	75	0	0	0
Oct 2023–Oct 2024	80	60	75	0	0	0
Oct 2024–Oct 2025	80	3	100	0	0	0
Oct 2025–Oct 2026	80	0	100	0	0	0
Oct 2026–Oct 2027	80	0	100	0	0	0
Jan 2018–Oct 2022	278	470	175	2	52	6
Oct 2022–Oct 2027	400	163	450	0	0	0
Jan 2018–Oct 2027	678	633	625	2	52	6
	1.75	3.00	2.15	2.30	2.96	2.98

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Cross Creek Ranch		Institutional		Harrison Interests		Harrison Interests Commercial/Town Center		Foster Creek Estates		Whispering Oaks	
MPC	Willows		Existing		Single Family		Mixed Use		Single Family		Single Family	
Name	Fulshear		Fulshear		Fulshear ETJ		Fulshear ETJ		Fort Bend County		Fort Bend County	
Land Use	Single Family		Existing		Probable		Probable		Existing		Developing	
Development Phase	Developing		Existing		Probable		Probable		Existing		Developing	
Municipality	Fulshear		Fulshear		Fulshear ETJ		Fulshear ETJ		Fort Bend County		Fort Bend County	
	H20	H20	H21	H21	I01	I01	I01	I01	J01	J01	J01	J01
<p>74 duplex lots - 148 total units Jan. 2018: 5 Occ'd, 3 Avail., 6 UC & 134 dev'd lots LTBO; builder: Chesmar Homes</p> <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. 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 dev'ers; (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 dev'er; (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 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>												
NEW HOUSING OCCUPANCIES:												
Jan 2018–Oct 2018	29	124	0	0	0	0	0	0	1			5
Oct 2018–Oct 2019	45	188	0	0	0	0	0	0	1			6
Oct 2019–Oct 2020	42	254	0	0	0	0	5	5	1			4
Oct 2020–Oct 2021	25	287	0	0	15	15	25	40	0			4
Oct 2021–Oct 2022	2	273	0	0	45	45	50	95	0			3
Oct 2022–Oct 2023	0	255	0	0	85	85	75	160	1			1
Oct 2023–Oct 2024	0	215	0	0	135	135	95	230	1			1
Oct 2024–Oct 2025	0	183	0	0	180	180	130	310	0			0
Oct 2025–Oct 2026	0	180	0	0	200	200	140	340	0			0
Oct 2026–Oct 2027	0	180	0	0	240	240	140	380	0			0
Jan 2018–Oct 2022	143	1,126	0	0	60	60	80	140	3			22
Oct 2022–Oct 2027	0	1,013	0	0	840	840	580	1,420	2			2
Jan 2018–Oct 2027	143	2,139	0	0	900	900	660	1,560	5			24
	2.70	x	2.15	x	3.20	3.20	2.25	x	2.95			3.00

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes									
MPC									
Name			Bella Vista	Foster Island Estates	Karaugh		Colony West	Foster Crossing	
Land Use	Single Family		Single Family	Single Family	Single Family		Single Family	Single Family	
Development Phase	Probable		Existing	Existing	Developing		Existing	Developing	
Municipality	Fort Bend County		Fulshear ETJ	Fulshear ETJ	Fulshear ETJ		Fulshear ETJ	Fulshear ETJ	
	J01	J01	J02	J02	J02	J02	J03	J03	J03
NEW HOUSING OCCUPANCIES:	Jan. 2018: 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 Imperato 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)		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. 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. 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 2018–Oct 2018	0	6	0	0	0	0	0	0	0
Oct 2018–Oct 2019	1	8	0	0	0	0	0	1	1
Oct 2019–Oct 2020	2	7	0	0	1	1	0	2	2
Oct 2020–Oct 2021	4	8	0	0	0	0	0	1	1
Oct 2021–Oct 2022	5	8	0	0	0	0	0	1	1
Oct 2022–Oct 2023	8	10	0	0	1	1	0	2	2
Oct 2023–Oct 2024	9	11	0	0	0	0	0	0	0
Oct 2024–Oct 2025	11	11	0	0	0	0	0	1	1
Oct 2025–Oct 2026	12	12	0	0	1	1	0	1	1
Oct 2026–Oct 2027	15	15	0	0	0	0	0	1	1
Jan 2018–Oct 2022	12	37	0	0	1	1	0	5	5
Oct 2022–Oct 2027	55	59	0	0	2	2	0	5	5
Jan 2018–Oct 2027	67	96	0	0	3	3	0	10	10
	3.00	x	3.00	3.00	3.00	x	3.00	3.00	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	Foster Farms	LaPrada Landing	Single Family		Fulbrook	
MPC						
Name	Foster Farms Inc. Tract	LaPrada Landing	Single Family		Single Family	
Land Use	Single Family	Single Family	Single Family		Single Family	
Development Phase	Probable	Developing	Probable		Developing	
Municipality	Fulshear ETJ	Fulshear ETJ	Fulshear ETJ		Fulshear ETJ	
	K01	K01	K01	K01	L01	L01
NEW HOUSING OCCUPANCIES:	Jan. 2018: 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; 2015: have ~2,626 ac. in PU; & have MUDs; and are working on a Foster LID (Levee Improvement Dist. s/Angle 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 % fl. plain/floodway & need for detention/channelization	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. 2018: 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;		Sections: Fulbrook Creeks, Churchill, The Commons, Woodshore, Otbow Lake, Pecan Reserve & River Cliff Jan. 2016: 262 Occ'd, 1 Avail., 7 UC & 159 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; Jan. 2014: 213 Occ'd, 0 Avail., 11 UC & 142 dev'd lots LTBO; developer has a concept plan for 117 future lots;	
Jan 2018–Oct 2018	0	0	0	0	5	5
Oct 2018–Oct 2019	0	0	0	0	7	7
Oct 2019–Oct 2020	0	1	0	1	8	8
Oct 2020–Oct 2021	5	0	0	5	8	8
Oct 2021–Oct 2022	10	0	0	10	7	7
Oct 2022–Oct 2023	35	1	0	36	6	6
Oct 2023–Oct 2024	110	0	5	115	7	7
Oct 2024–Oct 2025	180	1	8	189	8	8
Oct 2025–Oct 2026	230	0	11	241	6	6
Oct 2026–Oct 2027	280	1	14	295	7	7
Jan 2018–Oct 2022	15	1	0	16	35	35
Oct 2022–Oct 2027	835	3	38	876	34	34
Jan 2018–Oct 2027	850	4	38	892	69	69
	3.20	2.70	3.14	x	2.60	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018-2027
POPULATION AND SURVEY ANALYSTS



PASA Notes				
MPC	Fulbrook at Fulshear Creek		Fulshear Run	Fulshear Run
Name	Fulbrook at Fulshear Creek		Fulshear Run	Fulshear Run
Land Use	Single Family		Single Family	Multi-Family
Development Phase	Developing		Developing	Probable
Municipality	Fulshear		Fulshear	Fulshear
	L02	L02	L03	L03
NEW HOUSING OCCUPANCIES:	<p>In 2017 the lot count has been lowered to 979 from 1,100; formerly Fulshear Creek Crossing; Fulshear Trace is being built through here; new plats are being approved south of Bessies Creek;</p> <p>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;</p> <p>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;</p> <p>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> <p>Jan. 2015: 121 Occ'd, 9 Avail., 19 UC & 171 dev'd lots LTBO; has plans for 880 future lots - constructing bridge-that will allow a road through the abutting property;</p> <p>Jan. 2014: 104 Occ'd, 7 Avail., 9 UC & 5 dev'd lots LTBO; dev'er completing 180-194 lots by July; expect higher student ratios phases to the West = infrastructure going in; constructing bridge-that will allow a road through the abutting property</p>		<p>Fulshear Run with 212 SF (&-30 urban residential lots - see next col.)</p> <p>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</p> <p>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;</p> <p>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.;</p>	<p>Jan. 2018: 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)</p>
Jan 2018-Oct 2018	50	50	13	0
Oct 2018-Oct 2019	58	58	17	0
Oct 2019-Oct 2020	65	65	19	0
Oct 2020-Oct 2021	70	70	21	25
Oct 2021-Oct 2022	73	73	22	50
Oct 2022-Oct 2023	77	77	24	50
Oct 2023-Oct 2024	80	80	22	25
Oct 2024-Oct 2025	80	80	20	0
Oct 2025-Oct 2026	76	76	17	0
Oct 2026-Oct 2027	59	59	13	0
Jan 2018-Oct 2022	316	316	92	75
Oct 2022-Oct 2027	372	372	96	75
Jan 2018-Oct 2027	688	688	188	150
	3.05	X	3.00	1.60

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes	"Highland Management 227 ac."		"Highland Management MUD 5"		Rand and Penn I	Rand and Penn II	"Harrison Interests"		Fulbrook	
MPC										
Name	"Highland Management 227 ac."		"Highland Management MUD 5"		Rand and Penn I	Rand and Penn II	"Harrison Interests"		Fulbrook	
Land Use	Single Family		Single Family		Single Family	Single Family	Single Family		Single Family	
Development Phase	Probable		Probable		Existing	Existing	Probable		Developing	
Municipality	Fulshear		Fulshear		Fulshear	Fulshear	Fulshear ETJ		Fort Bend County	
	L04	L04	L04	L04	L04	L05	L05	L05	L06	L06
NEW HOUSING OCCUPANCIES:	Jan. 2018: 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. 2018: 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. 2018: 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;	Jan. 2018: Christopher Morris has 52.7 ac.; CS Ranch Partners LLC have 76.1 ac.; Fred Bray has 69.5 ac.; John Lebouris has 44.5 ac.; Cornelius Sigmund has 37.8 38.9 ac.; Multiple Owners have ~397.7 ac.; developable tracts but plans unknown; several other smaller parcels in PU; Several tracts for sale along Bois D'Arc-may dev. rapidly but will likely have 1-ac. Lot restrictions; this area is		April 2018: Fulbrook Partners has 112 + 53 ac. that could have 49 additional SF lots near the Brazos River; also, there are ~45 divided lots LT80 outside the Fulshear ETJ; 8 homes are occupied	
Jan 2018–Oct 2018	0	0	0	0	0	0	0	0	4	4
Oct 2018–Oct 2019	0	0	0	0	0	0	0	0	4	4
Oct 2019–Oct 2020	0	0	0	0	0	0	0	0	4	4
Oct 2020–Oct 2021	15	0	0	0	15	0	0	0	5	5
Oct 2021–Oct 2022	35	2	0	0	37	0	5	5	5	5
Oct 2022–Oct 2023	40	7	0	0	47	0	7	7	5	5
Oct 2023–Oct 2024	40	14	0	0	54	0	11	11	6	6
Oct 2024–Oct 2025	45	16	0	0	61	5	15	20	6	6
Oct 2025–Oct 2026	50	18	0	0	68	5	15	20	6	6
Oct 2026–Oct 2027	55	21	0	0	76	10	16	26	6	6
Jan 2018–Oct 2022	50	2	0	0	52	0	5	5	22	22
Oct 2022–Oct 2027	230	76	0	0	306	20	64	84	29	29
Jan 2018–Oct 2027	280	78	0	0	358	20	69	89	51	51
	3.10	2.65	2.65	2.65	x	3.00	2.90	x	2.70	x

PROJECTED NEW HOUSING OCCUPANCIES, 2018–2027
POPULATION AND SURVEY ANALYSTS



PASA Notes MPC Name Land Use Development Phase Municipality	Total Projected New Housing Occupancies, 2018–2027							
	Undeveloped Vacant Fulshear ETJ	M01						
		M01						
	April 2018: Res/Vls Real Est. LTD Partnership has acreage along the south bank of the Brazos River; much of this land is in the floodway or flood plain							
NEW HOUSING OCCUPANCIES:								
Jan 2018–Oct 2018	0	0	802	0	0	48	0	850
Oct 2018–Oct 2019	0	0	1,175	20	50	68	0	1,313
Oct 2019–Oct 2020	0	0	1,360	150	80	80	0	1,670
Oct 2020–Oct 2021	0	0	1,714	155	125	84	0	2,078
Oct 2021–Oct 2022	0	0	1,934	255	150	87	0	2,426
Oct 2022–Oct 2023	0	0	2,104	315	175	80	0	2,674
Oct 2023–Oct 2024	0	0	2,278	310	170	80	0	2,838
Oct 2024–Oct 2025	0	0	2,435	345	205	80	0	3,065
Oct 2025–Oct 2026	0	0	2,568	375	215	80	0	3,238
Oct 2026–Oct 2027	0	0	2,529	390	215	80	0	3,214
Jan 2018–Oct 2022	0	0	6,985	580	405	367	0	8,337
Oct 2022–Oct 2027	0	0	11,914	1,735	980	400	0	15,029
Jan 2018–Oct 2027	0	0	18,899	2,315	1,385	767	0	23,366
	2.80	X						

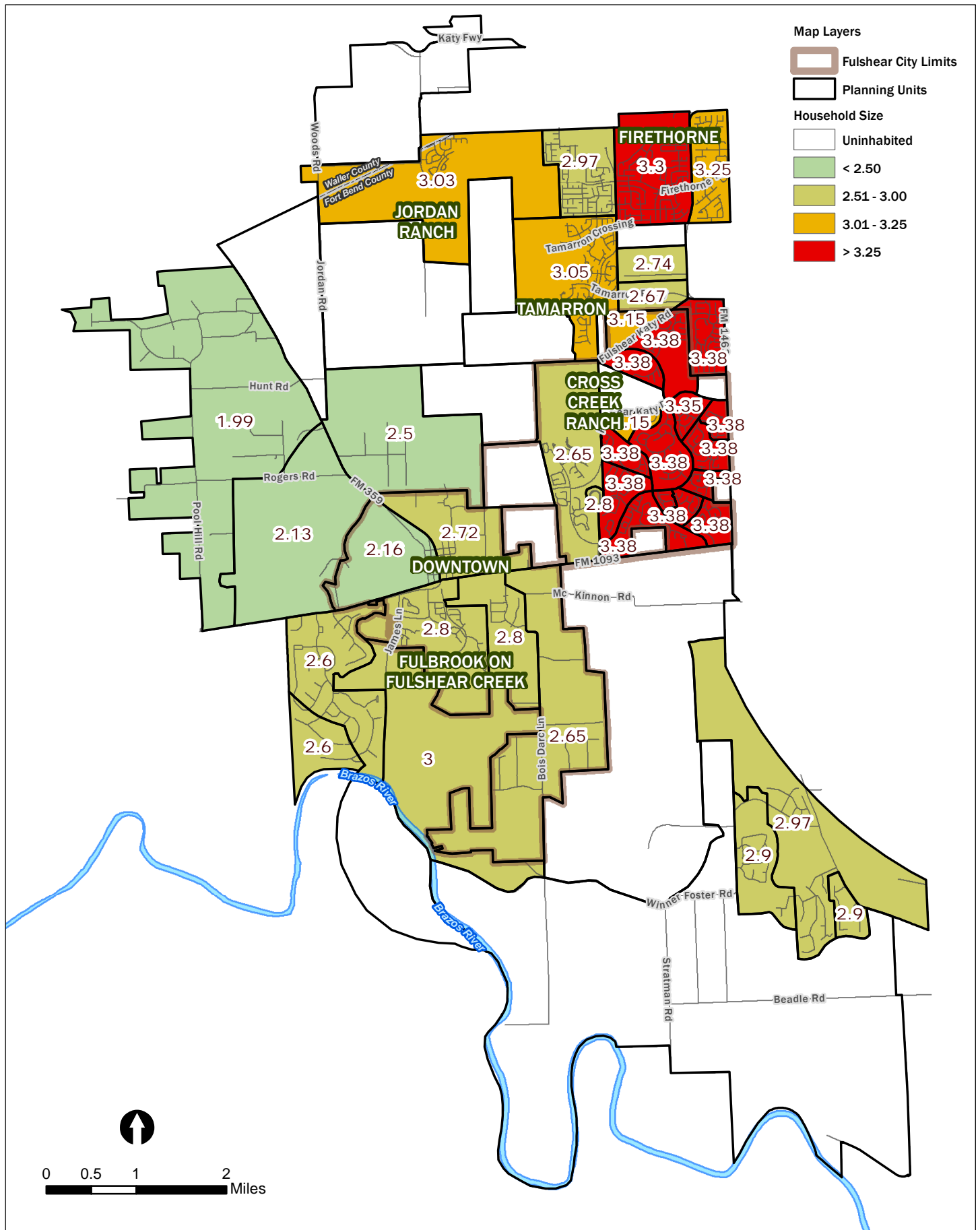
Estimated Household Size by Planning Unit



Planning Unit	Total Housing Units 2017	Estimated Housing Units Occupied 2017	Estimated 2017 Population	Estimated Average Household Size
A01	246	234	465	1.99
A02	17	16	34	2.13
A03	63	60	129	2.16
B02	71	67	183	2.72
B03	48	46	114	2.50
C01	74	70	213	3.03
E01	846	804	2,387	2.97
E02	1,330	1,264	4,170	3.30
E03	628	597	1,939	3.25
F01	625	594	1,811	3.05
F04	19	18	49	2.74
F06	3	3	8	2.67
G01	574	545	1,843	3.38
H01	253	240	812	3.38
H02	173	164	556	3.38
H03	320	304	1,028	3.38
H05	52	49	167	3.38
H06	339	322	1,089	3.38
H07	239	227	767	3.38
H08	108	103	347	3.38
H09	336	319	1,079	3.38
H10	160	152	514	3.38
H11	117	111	376	3.38
H12	134	127	430	3.38
H13	50	48	161	3.38
H15	21	20	63	3.15
H16	186	177	592	3.35
H17	17	16	51	3.15
H18	67	64	178	2.80
H20	283	269	712	2.65
J01	131	124	369	2.97
J02	60	57	165	2.90
J03	45	43	124	2.90
L01	258	245	637	2.60
L02	254	241	676	2.80
L03	15	14	40	2.80
L04	133	126	334	2.65
L05	11	10	31	3.00
L06	8	8	20	2.60
Total	8,314	7,898	24,663	
Estimated Persons per Physical Housing Unit				2.97
Weighted Mean Household Size				3.12

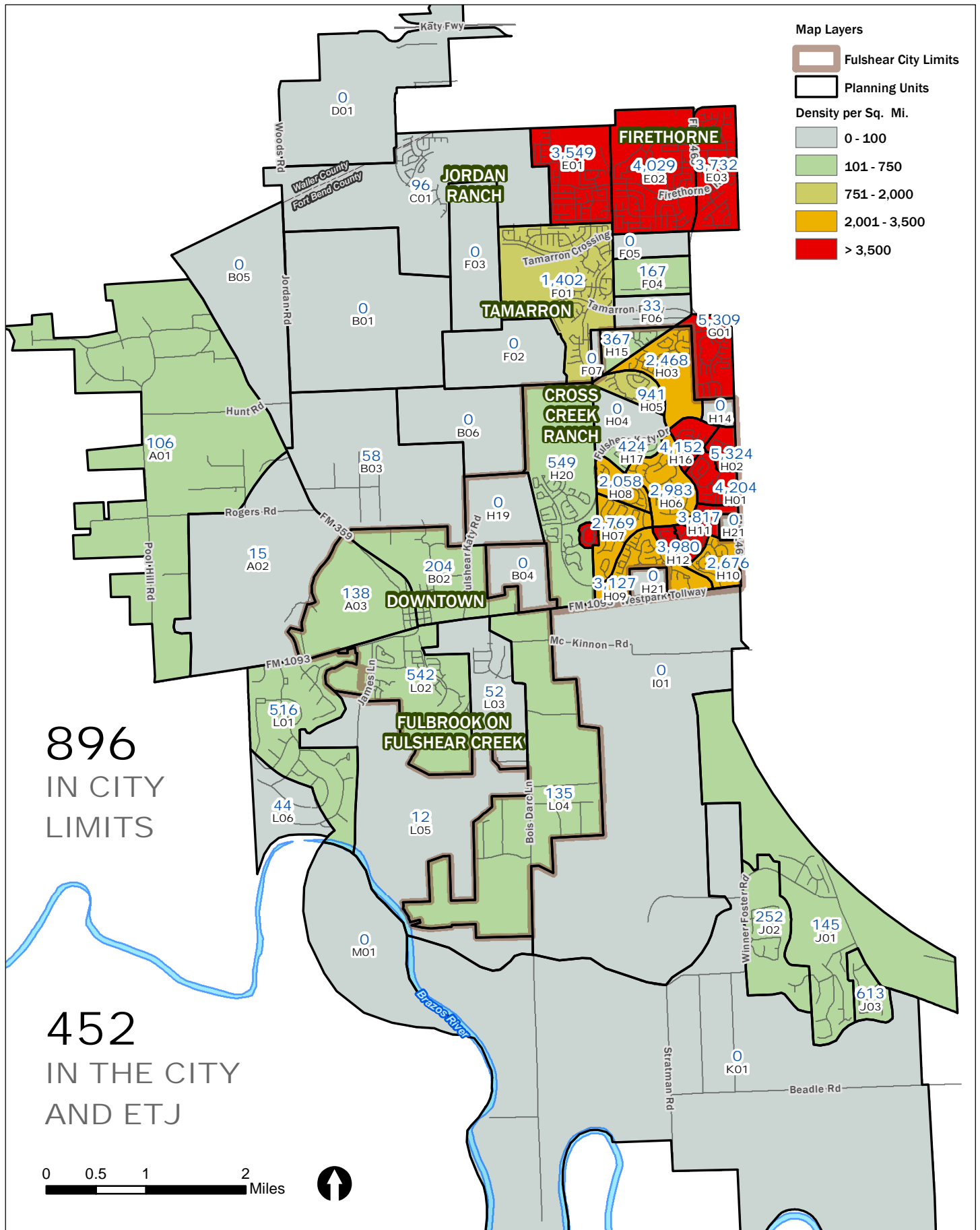
Median Household Size

2017 Estimate



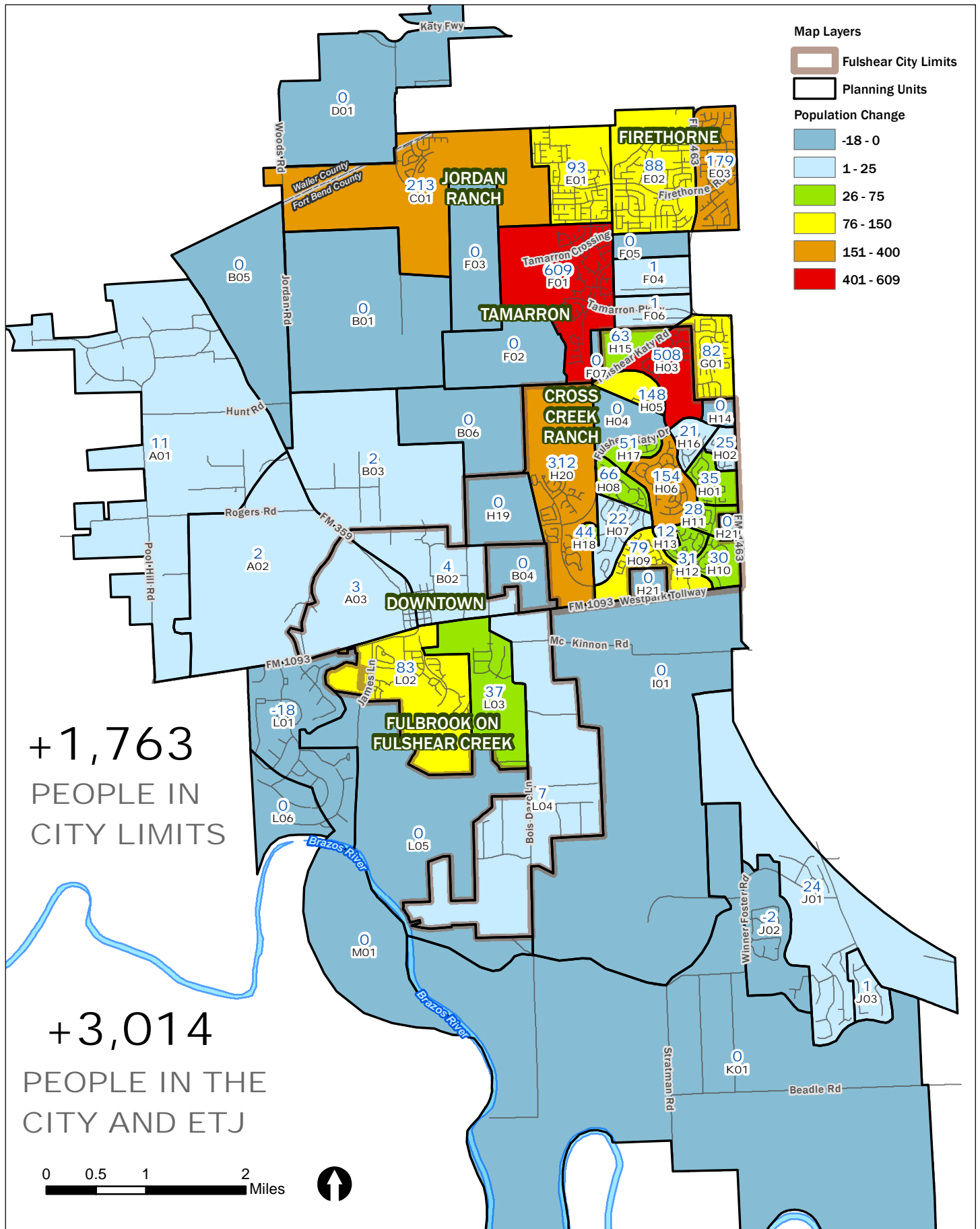
Population Density by Planning Unit

October 2017



Population Change by Planning Unit

Estimated October 2016 to October 2017



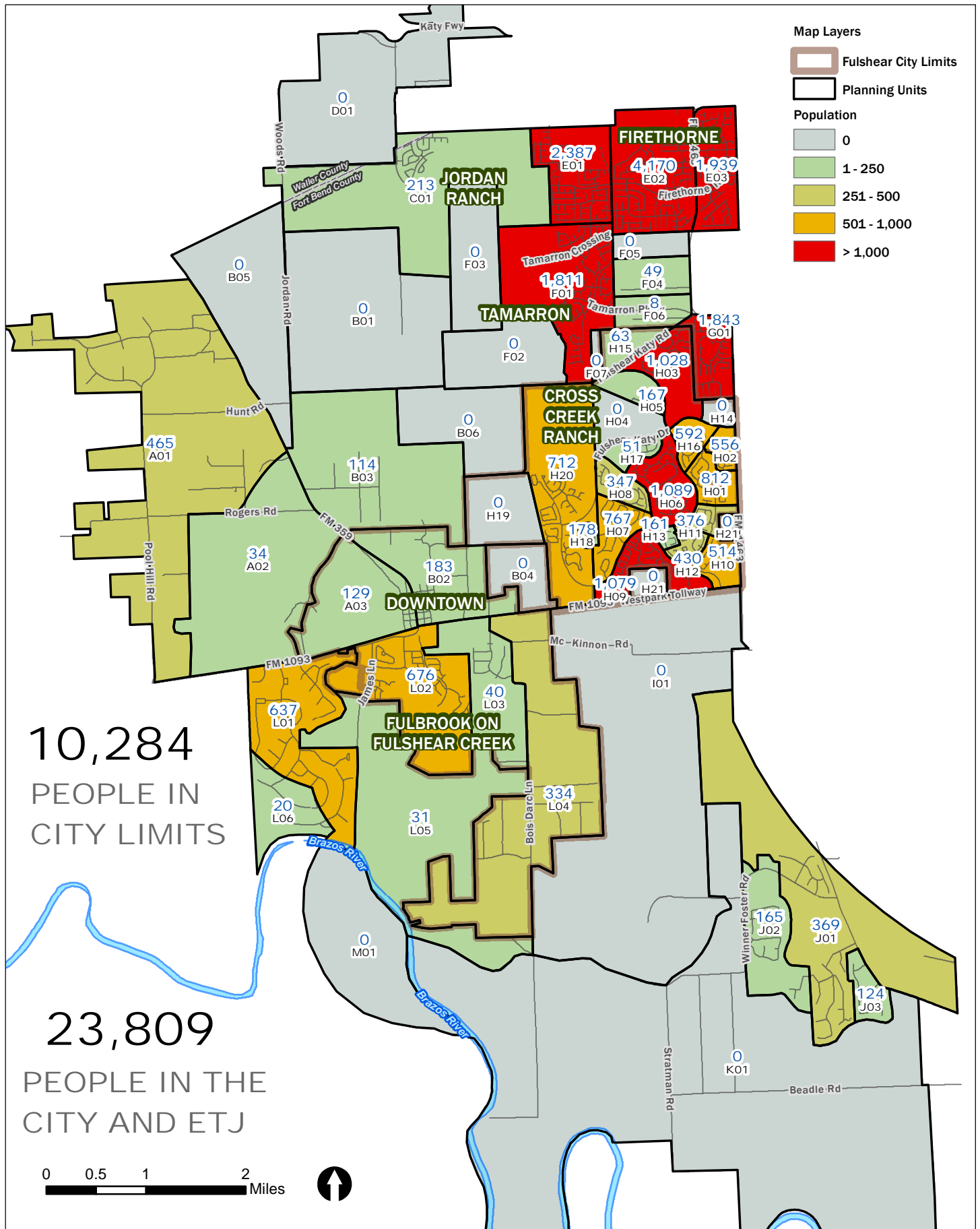
PROJECTED POPULATION BY YEAR
FULSHEAR JURISDICTION AND SINGLE MEMBER DISTRICTS



Area	Oct. 2017	Oct. 2018	Oct. 2019	Oct. 2020	Oct. 2021	Oct. 2022	Oct. 2023	Oct. 2024	Oct. 2025	Oct. 2026	Oct. 2027
City	10,284	12,198	13,999	16,088	18,390	20,552	22,594	24,642	26,100	27,482	28,708
ETJ	13,525	15,669	17,906	20,664	24,231	28,658	33,782	38,923	45,401	52,322	59,225
City + ETJ	23,809	27,867	31,905	36,752	42,621	49,210	56,376	63,565	71,501	79,804	87,933
Outside ETJ	854	944	1,052	1,200	1,408	1,685	2,011	2,337	2,922	3,586	4,302
SINGLE MEMBER DISTRICTS											
District 1	2,074	2,697	3,519	4,574	5,994	7,579	9,374	11,173	12,557	13,847	14,968
District 2	2,432	2,701	2,987	3,351	3,681	3,887	3,917	3,948	3,960	3,980	4,004
District 3	2,406	3,177	3,781	4,373	4,863	5,169	5,330	5,491	5,495	5,508	5,529
District 4	1,754	1,878	1,912	1,948	1,984	2,022	2,054	2,087	2,120	2,153	2,187
District 5	1,618	1,745	1,800	1,842	1,868	1,895	1,919	1,943	1,968	1,994	2,020

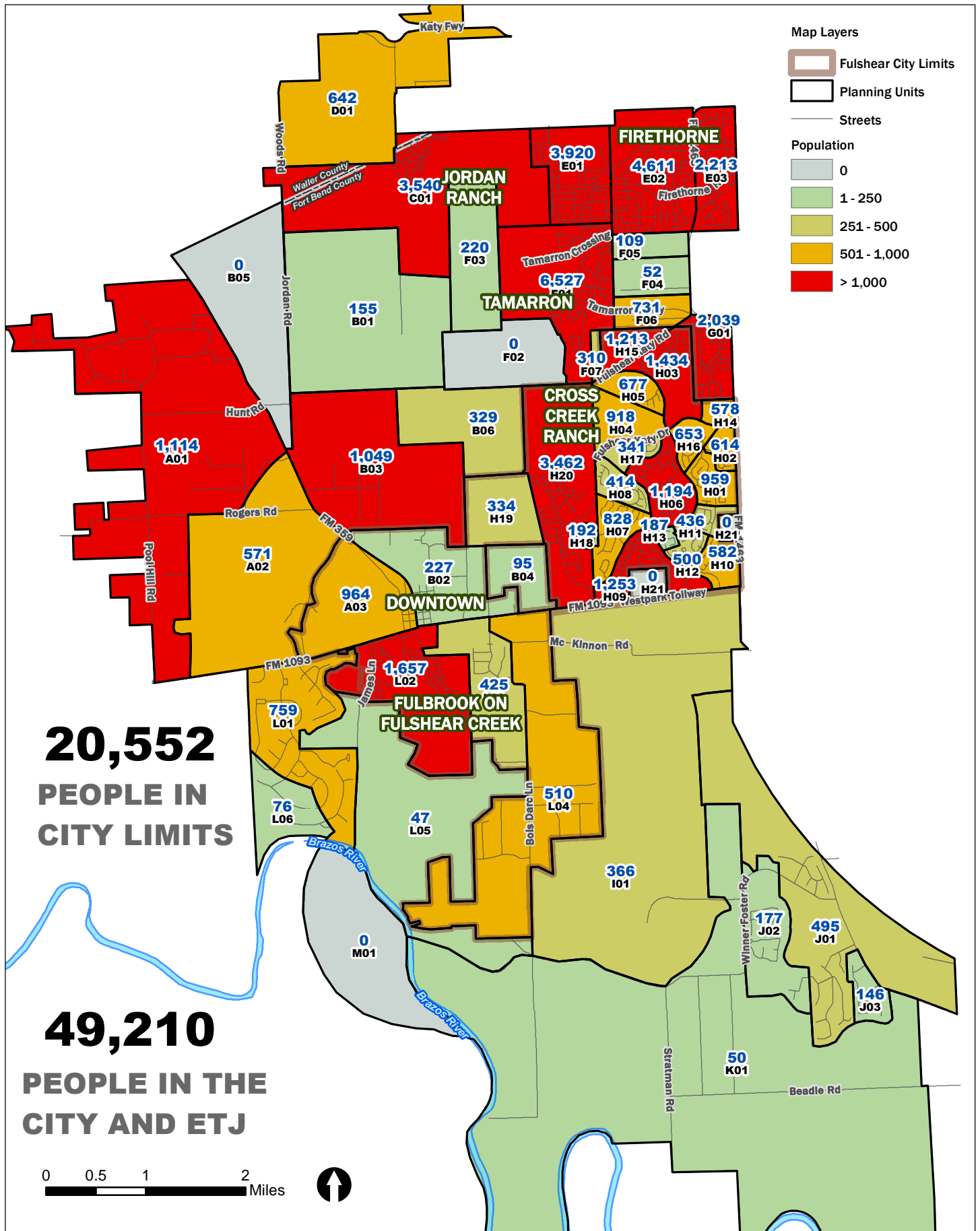
Population Estimates by Planning Unit

October 2017



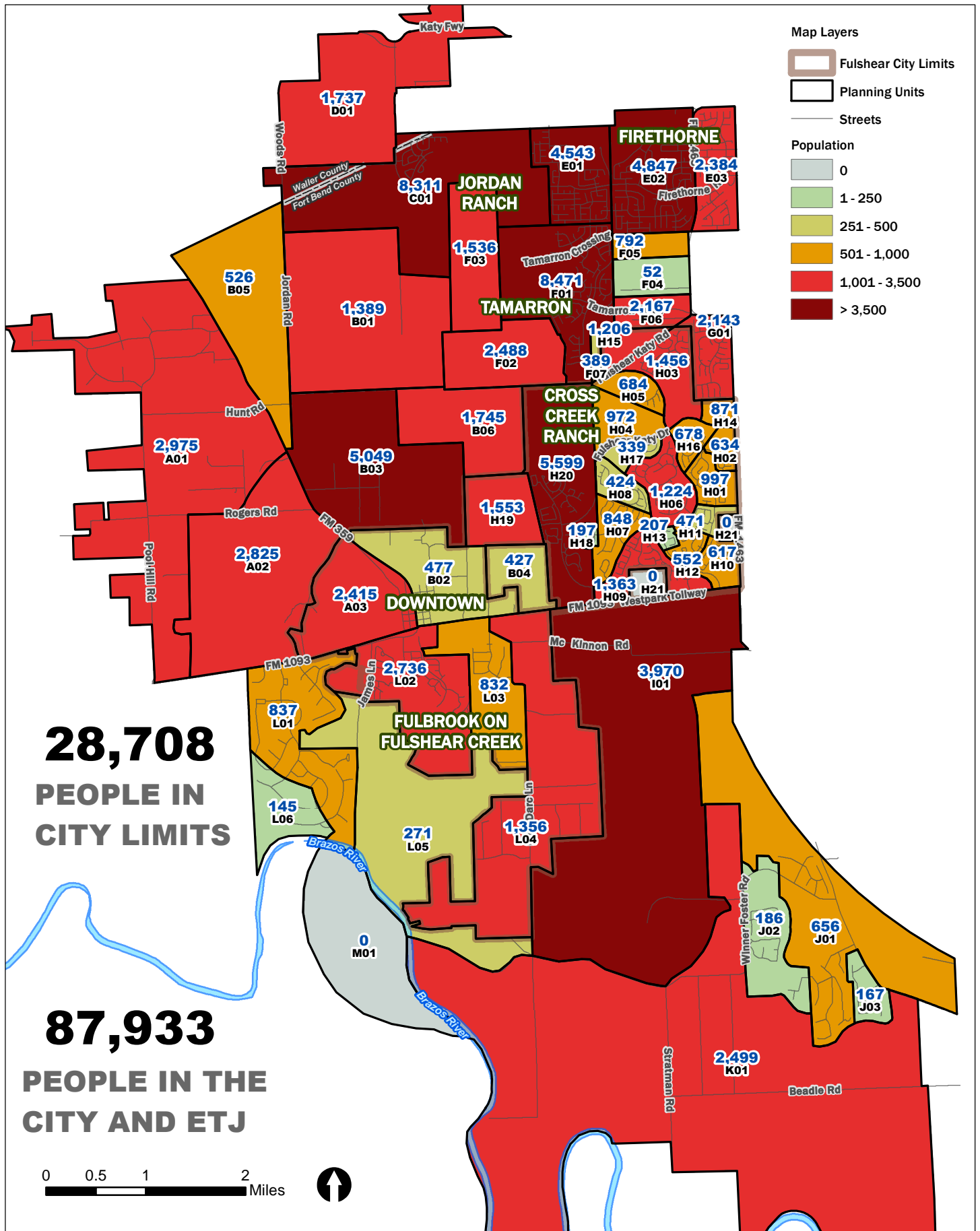
Projected Population in 2022

by Planning Unit



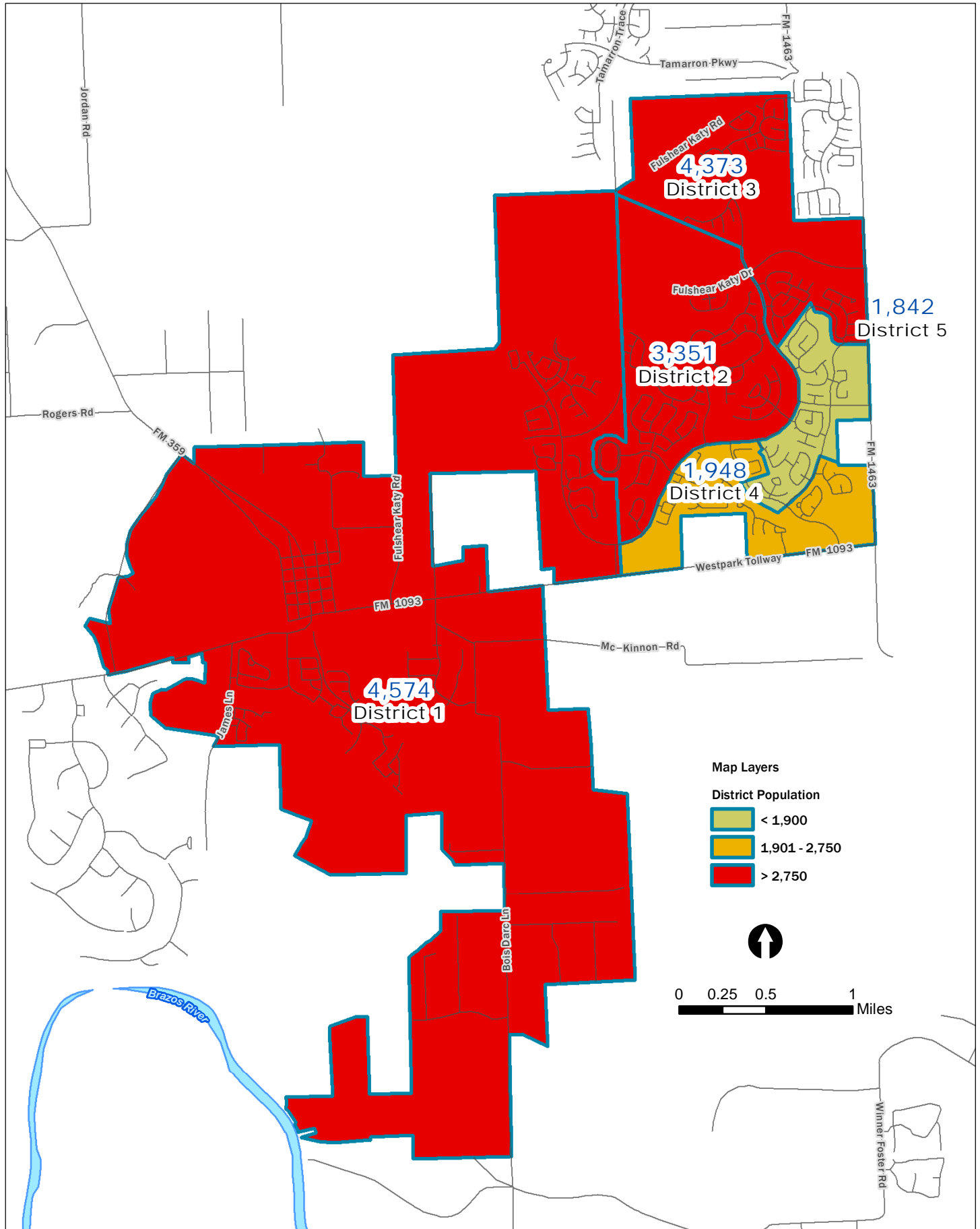
Projected Population in 2027

by Planning Unit



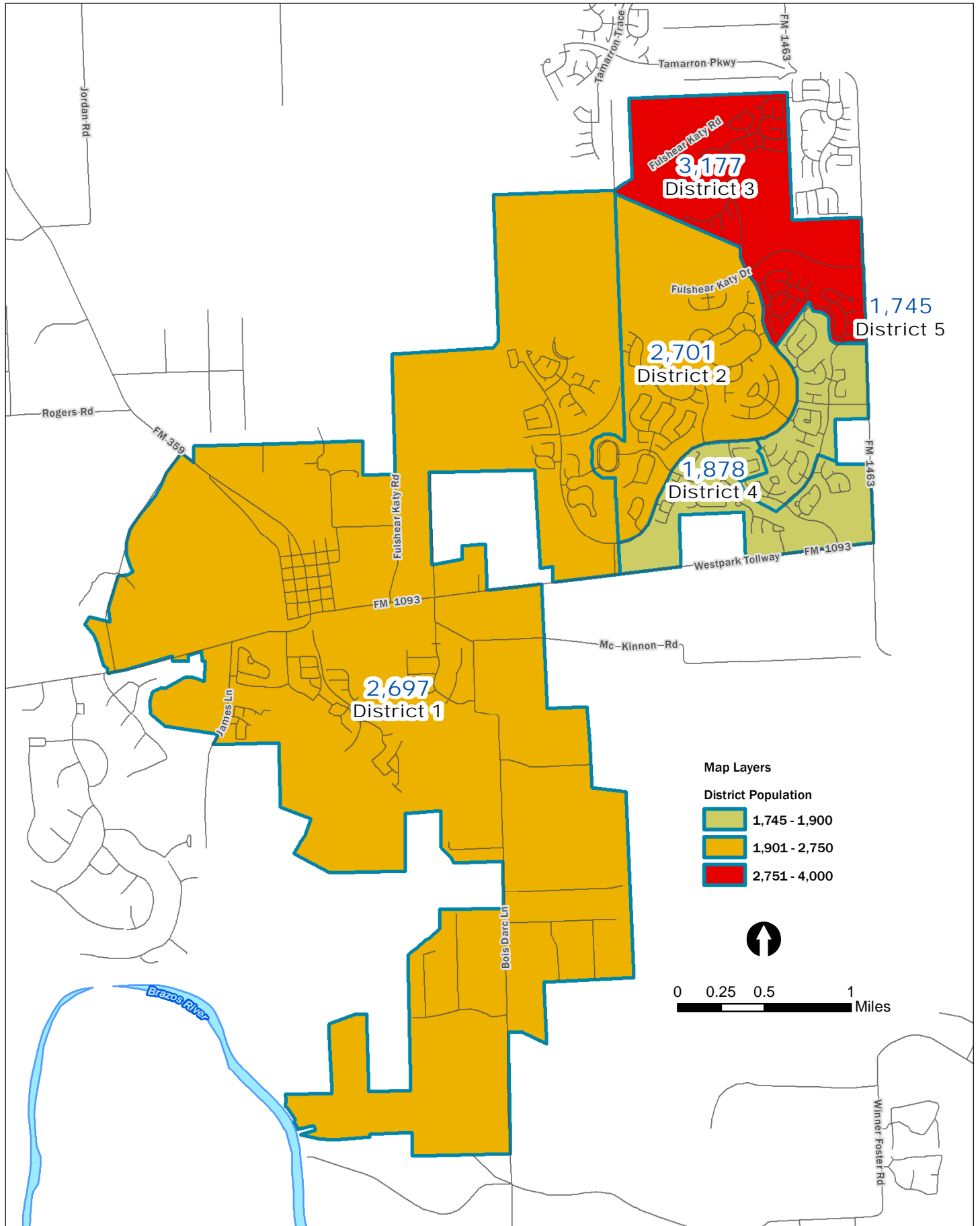
Population Projections 2020

Single Member Districts



Population Projections 2018

Single Member Districts



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



Planning Unit	District	Area	Oct. 2017	Oct. 2018	Oct. 2019	Oct. 2020	Oct. 2021	Oct. 2022	Oct. 2023	Oct. 2024	Oct. 2025	Oct. 2026	Oct. 2027
A01		X	465	506	581	699	871	1,114	1,400	1,686	2,084	2,530	2,975
A02		ETJ	34	36	79	193	368	571	821	1,071	1,575	2,192	2,825
A03	1	CL	129	136	250	445	694	964	1,244	1,524	1,812	2,114	2,415
B01		ETJ	0	0	0	0	31	155	323	491	775	1,084	1,389
B02	1	CL	183	193	193	193	204	227	272	317	371	424	477
B03		ETJ	114	120	122	201	486	1,049	1,743	2,437	3,271	4,188	5,049
B04		ETJ	0	0	0	11	43	95	157	219	289	358	427
B05		X	0	0	0	0	0	0	0	0	142	312	526
B06		ETJ	0	0	0	48	158	329	544	759	1,060	1,404	1,745
C01		ETJ	213	611	1,182	1,812	2,598	3,540	4,535	5,535	6,489	7,399	8,311
D01		ETJ	0	13	139	310	478	642	848	1,054	1,285	1,515	1,737
E01		ETJ	2,387	2,693	2,950	3,297	3,635	3,920	4,111	4,306	4,378	4,457	4,543
E02		ETJ	4,170	4,431	4,475	4,520	4,565	4,611	4,657	4,704	4,751	4,799	4,847
E03		ETJ	1,939	2,087	2,118	2,149	2,181	2,213	2,246	2,280	2,314	2,349	2,384
F01		ETJ	1,811	2,637	3,627	4,580	5,560	6,527	7,501	8,480	8,456	8,453	8,471
F02		ETJ	0	0	0	0	0	0	48	96	1,060	1,910	2,488
F03		ETJ	0	0	0	16	79	220	421	622	910	1,225	1,536
F04		ETJ	49	52	52	52	52	52	52	52	52	52	52
F05		ETJ	0	0	0	16	47	109	218	327	463	629	792
F06		ETJ	8	8	105	264	484	731	1,020	1,309	1,575	1,872	2,167
F07		ETJ	0	0	35	110	219	310	348	386	385	386	389
G01		ETJ	1,843	1,959	1,979	1,999	2,019	2,039	2,059	2,080	2,101	2,122	2,143
H01	5	CL	812	880	918	943	951	959	966	973	981	989	997
H02	3	CL	556	590	596	602	608	614	618	622	626	630	634
H03	3	CL	1,028	1,157	1,239	1,320	1,389	1,434	1,436	1,438	1,443	1,449	1,456
H04	2	CL	0	0	168	454	724	918	938	959	958	963	972
H05	3	CL	167	503	700	699	688	677	676	675	678	681	684
H06	2	CL	1,089	1,174	1,179	1,184	1,189	1,194	1,200	1,206	1,212	1,218	1,224
H07	2	CL	767	812	816	820	824	828	832	836	840	844	848
H08	2	CL	347	403	411	412	413	414	416	418	420	422	424
H09	4	CL	1,079	1,157	1,180	1,204	1,228	1,253	1,274	1,296	1,318	1,340	1,363
H10	4	CL	514	549	557	565	573	582	589	596	603	610	617
H11	5	CL	376	403	411	419	427	436	443	450	457	464	471
H12	5	CL	430	462	471	480	490	500	510	520	530	541	552
H13	4	CL	161	172	175	179	183	187	191	195	199	203	207
H14	3	CL	0	0	42	253	417	578	736	894	883	875	871
H15	3	CL	63	298	569	858	1,114	1,213	1,206	1,199	1,197	1,200	1,206
H16	3	CL	592	629	635	641	647	653	658	663	668	673	678
H17	2	CL	51	124	224	291	340	341	338	335	335	337	339
H18	2	CL	178	188	189	190	191	192	193	194	195	196	197
H19	1	CL	0	0	0	0	117	334	736	1,138	1,392	1,541	1,553
H20	1	CL	712	1,069	1,551	2,161	2,852	3,462	4,024	4,589	4,923	5,257	5,599
H21		ETJ	0	0	0	0	0	0	0	0	0	0	0
I01		ETJ	0	0	0	11	114	366	795	1,224	2,055	2,956	3,970
J01		X	369	407	430	450	473	495	523	551	581	614	656
J02		ETJ	165	174	174	177	177	177	180	183	183	186	186
J03		ETJ	124	131	134	140	143	146	152	158	161	164	167
K01		ETJ	0	0	0	3	19	50	163	276	863	1,603	2,499
L01		ETJ	637	684	702	722	742	759	773	787	806	820	837
L02	1	CL	676	866	1,042	1,237	1,444	1,657	1,882	2,108	2,342	2,564	2,736
L03	1	CL	40	81	131	186	285	425	568	711	760	801	832
L04	1	CL	334	352	352	352	398	510	648	786	957	1,146	1,356
L05		ETJ	31	33	33	33	33	47	67	87	144	199	271
L06		X	20	31	41	51	64	76	88	100	115	130	145
M01		ETJ	0	0	0	0	0	0	0	0	0	0	0

City of Fulshear Population Growth Scenarios, City Limits and ETJ

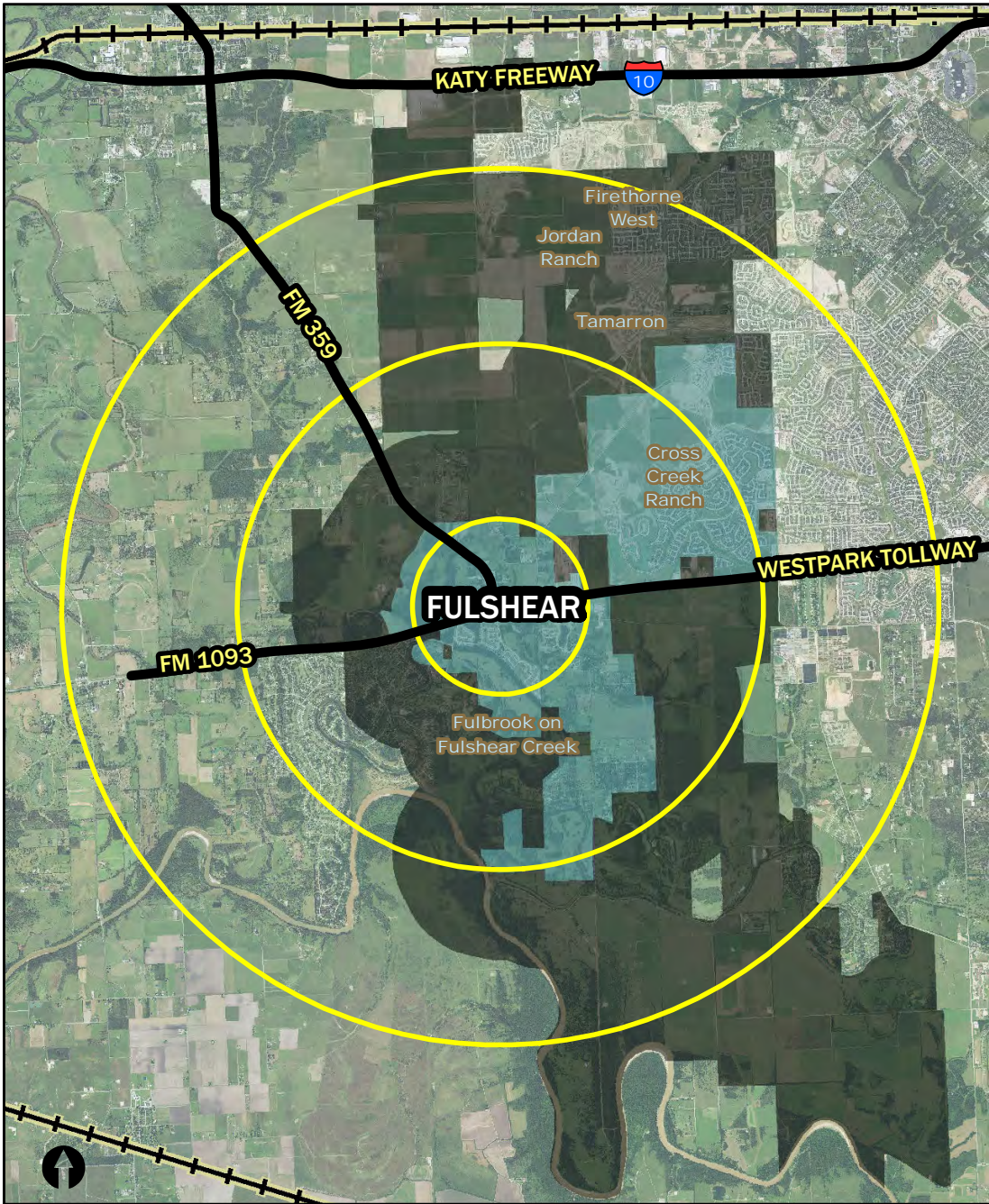


		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
CITY LIMITS	Low										
	Population	12,160	13,925	15,910	18,028	19,887	21,582	23,241	24,393	25,443	26,363
	% Growth	0.18	0.15	0.14	0.13	0.10	0.09	0.08	0.05	0.04	0.04
	Growth	1,876	1,765	1,985	2,118	1,859	1,695	1,659	1,152	1,050	920
	Moderate										
	Population	12,198	13,999	16,088	18,390	20,552	22,594	24,642	26,100	27,482	28,708
	% Growth	0.19	0.15	0.15	0.14	0.12	0.10	0.09	0.06	0.05	0.04
	Growth	1,914	1,801	2,089	2,302	2,162	2,042	2,048	1,458	1,382	1,226
	High										
	Population	12,236	14,109	16,302	18,742	21,055	23,250	25,462	27,051	28,564	29,913
	% Growth	0.19	0.15	0.16	0.15	0.12	0.10	0.10	0.06	0.06	0.05
	Growth	1,952	1,873	2,193	2,440	2,313	2,195	2,212	1,589	1,513	1,349

		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
ETJ	Low										
	Population	15,626	17,774	20,256	23,252	26,705	30,394	33,736	37,623	41,499	45,158
	% Growth	0.16	0.14	0.14	0.15	0.15	0.14	0.11	0.12	0.10	0.09
	Growth	2,101	2,148	2,482	2,996	3,453	3,689	3,342	3,887	3,876	3,659
	Moderate										
	Population	15,669	17,906	20,664	24,231	28,658	33,782	38,923	45,401	52,322	59,225
	% Growth	0.16	0.14	0.15	0.17	0.18	0.18	0.15	0.17	0.15	0.13
	Growth	2,144	2,237	2,758	3,567	4,427	5,124	5,141	6,478	6,921	6,903
	High										
	Population	15,712	18,038	20,934	24,715	29,452	34,960	40,512	47,573	55,151	62,744
	% Growth	0.16	0.15	0.16	0.18	0.19	0.19	0.16	0.17	0.16	0.14
	Growth	2,187	2,326	2,896	3,781	4,737	5,508	5,552	7,061	7,578	7,593

Fulshear Demographics

Downtown Fulshear Trade Area

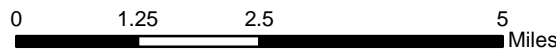


Demographic Profile

Age	
Under 5 years	9.8%
5 to 17 years	26.2%
18 to 24 years	4.7%
25 to 34 years	11.5%
35 to 54 years	34.5%
55 to 74 years	11.8%
75 years and over	1.6%

Population 25 and Over:	63.9%
Bachelor's Degree or Higher	
Owner-Occupied Housing	97.6%
Three or More Vehicles in Household	32.2%
Median Housing Value	\$409,500
Housing Costs > 30% of Monthly Income	20.9%
Unemployment Rate	5.1%
Mean Travel Time to Work (Minutes)	39.4
Median Household Income	\$167,708

Source: U.S. Census Bureau, 2016 American Community Survey, 5-Year Estimates



Trade Area Population

	2017 Estimate	2019 Projected	2022 Projected	2027 Projected
1-mile	1,028	1,616	3,273	6,460
3-mile	10,026	12,321	19,710	41,861
5-mile	57,059	65,583	84,255	126,173

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