AC44 Comprehensive Plan

2025 Land Use Buildout Analysis



Board of Supervisors
September 3, 2025

Project History: Four Phases

Phase 1

AC44 Framework: Equitable/Resilient Community

Review Growth Management Policy

Land use buildout analysis (2022)

Phase 2

Updated Goals and Objectives for each Plan Chapter

Planning Toolkits: coordinated land use + transportation planning

Phase 3

Updated Action Steps for each Plan Chapter

Prioritized Plan recommendations with 'Big Moves'

Phase 4

Finalized Comp Plan document

Land use buildout analysis update (2025)

Public hearings with Planning Commission and Board

Topic Overview

Today's Presentation:

- Review 2025 analysis
- Discuss questions
- Obtain feedback

Future Presentation:

- Review capacity through a market-based lens
- Review draft scorecard
- Respond to questions and feedback received today



Why is this important?

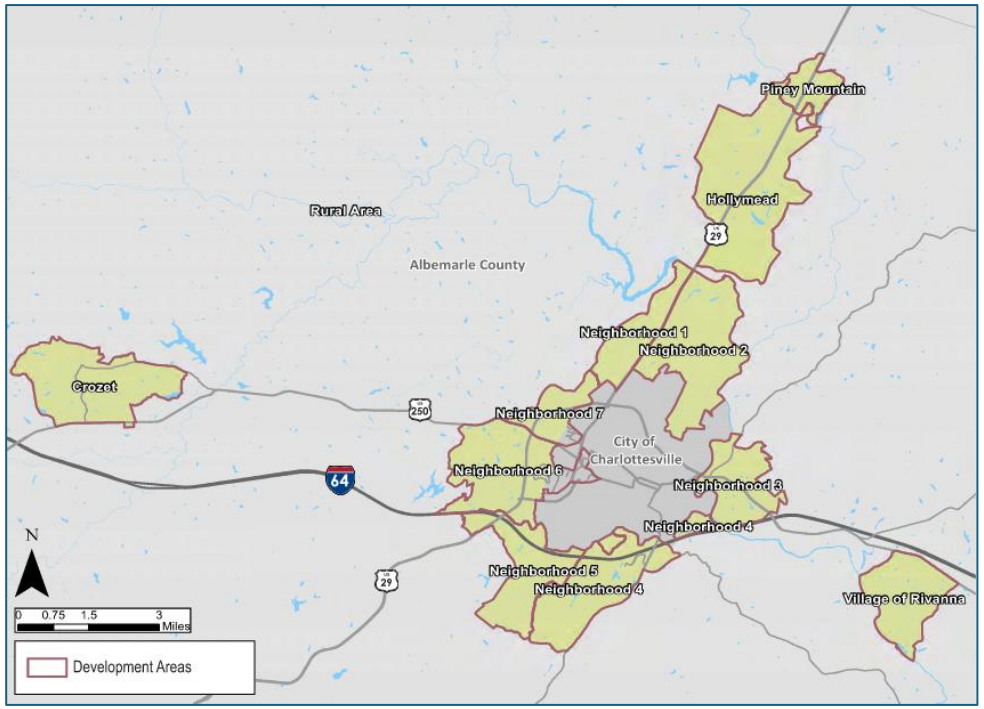
- Understanding the Development Areas (DA) capacity is essential to implementing the Comprehensive Plan and supports several FY24-28 Strategic Plan goals.

- Monitoring utilization of the DA will help us make progress towards goals related to Housing, Economic Development, and more, as well as provide context for evaluating future development applications.

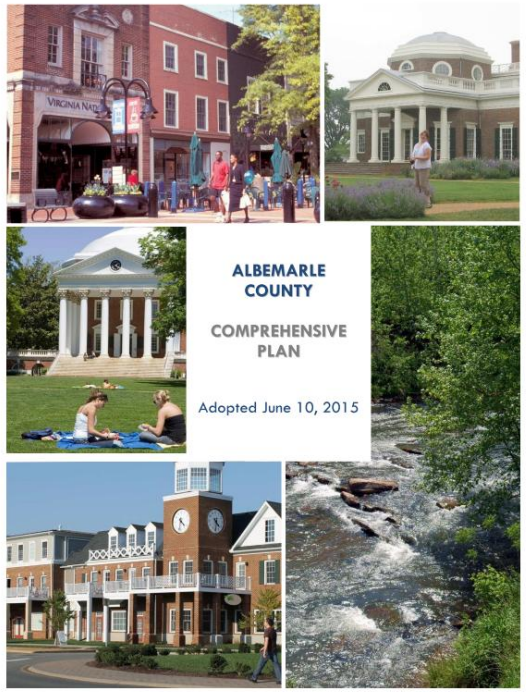


Development Areas

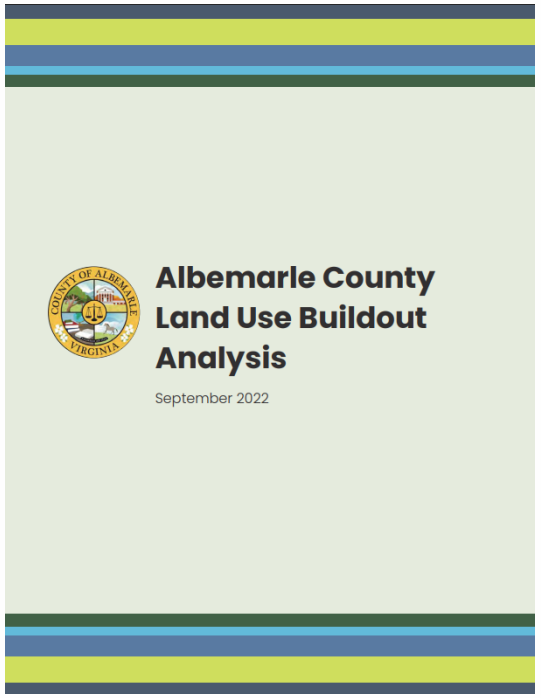
1. Places29
   - Hollymead
   - Piney Mountain
   - Neighborhoods 1 and 2
2. Pantops
   - Neighborhood 3
3. Southern and Western Neighborhoods
   - Neighborhoods 4 - 7
4. Crozet
5. Village of Rivanna



History


ALBEMARLE
COUNTY
COMPREHENSIVE
PLAN
Adopted June 10, 2015


2019 Growth Management Report
NOVEMBER 12, 2019


Albemarle County
Land Use Buildout
Analysis
September 2022

Methodology and Buildout Assumptions

Definitions

- **Developable/redevelopable** – parcels that meet the "development opportunity" criteria in the 2022 Land Use Buildout Analysis report for their respective land use type.

- **Theoretical maximum buildout** – the maximum amount of development possible on a parcel under its land use designation in the Comprehensive Plan (e.g. 1 acre of developable space with Urban Density Residential = 34 dwelling units).



Overall Research Approach

Development pipeline

+

Theoretical maximum buildout estimate

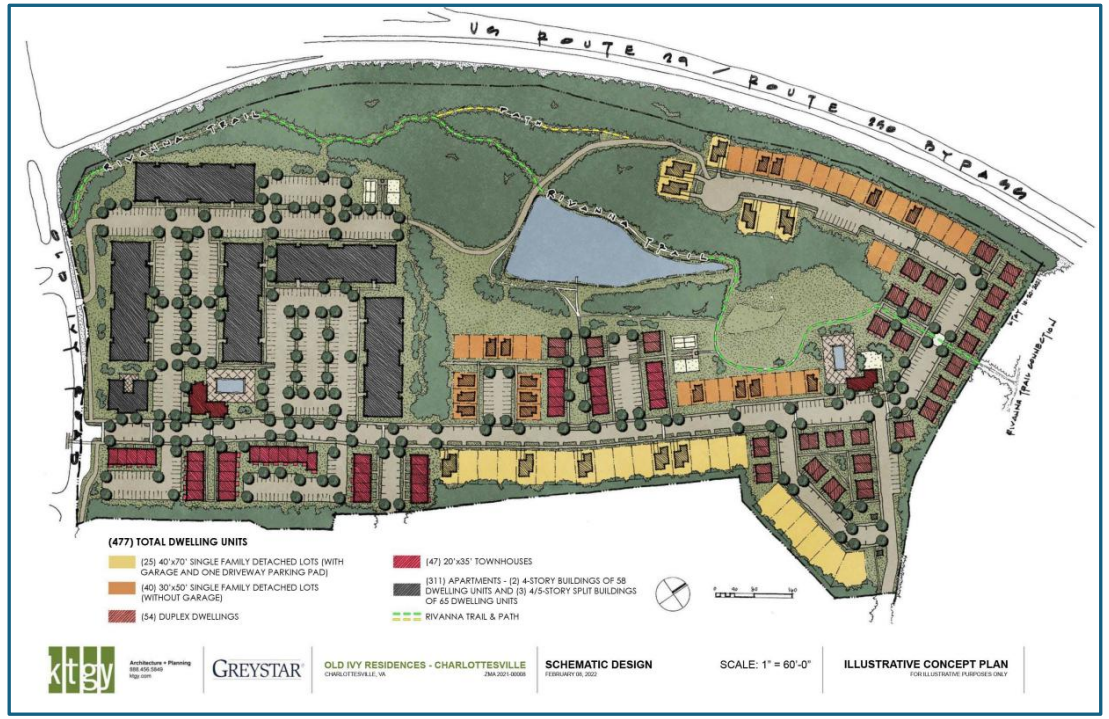
Total theoretical maximum buildout estimate



Development Pipeline

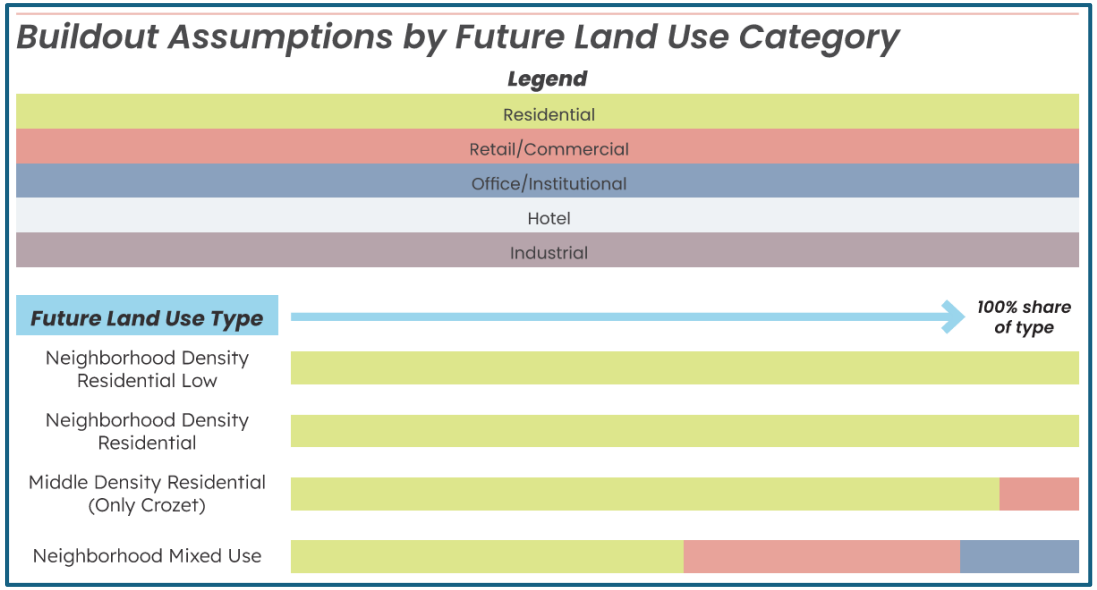
1. Projects approved (but not yet built)
2. Projects currently under review

Example: Old Ivy Residences



Theoretical maximum buildout estimate

1. Identify developable parcels.
2. Remove area for environmental factors and infrastructure, and open space.
3. Apply a set of buildout assumptions by land use type to calculate future buildout capacity.



Buildout Assumptions on p.10 of Att. A

Residential Findings

2022 Residential Findings

Summary of Development Area Residential Pipeline and Buildout Totals

Maximum Remaining Unbuilt Approved Units	Maximum Units Under Review	Residential Theoretical Maximum Buildout Estimate	Total Theoretical Maximum Future Residential Buildout
9,377	5,504	9,252	24,133



2022 Residential Findings

Summary of Development Area Residential Pipeline and Buildout Totals

Maximum Remaining Unbuilt Approved Units	Maximum Units Under Review	Residential Theoretical Maximum Buildout Estimate	Total Theoretical Maximum Future Residential Buildout
9,377	5,504	9,252	24,133

"Development pipeline"



2025 Residential Findings

Max. Remaining (Unbuilt) Approved Units	Max. Units Under Review	Theoretical Max. Buildout Estimate	Total Theoretical Maximum Future
11,230	3,986	6,428	21,644

"Development pipeline"



2022 vs. 2025 Residential Findings

		2022	2025	Trend
"Development Pipeline"	Max. Remaining Approved Units (Unbuilt)	9,377	11,230	Higher
	Max. Units Under Review	5,504	3,986	Lower
Theoretical Max. Buildout Estimate		9,252	6,428	Lower
Total		24,133	21,644	Lower



2022 to Q1 2025 Residential Deliveries

	2022	2023	2024	2025 (through 4/1/25)
# of Residential Dwelling Units issued a Certificate of Occupancy in the Development Areas	699	904	1232	89



Non-Residential Findings

2022 Non-Residential Findings

Summary of Development Areas Theoretical Maximum Buildout

Retail/ Commercial Sq.Ft.	Office/ Institutional Sq.Ft.	Hotel Rooms	Industrial Sq.Ft.
1,959,849	2,725,883	2,554	5,565,023



2025 Non-Residential Findings

Retail SF	Office SF	Hotel Rooms	Industrial SF
1,324,443	1,376,864	1,591	4,898,087



2022 vs. 2025 Non-Residential Findings

	2022	2025	20 Year Demand Forecast (High)	2022-2025 Trend
Retail SF	1,959,849	1,324,443	1,300,000	Lower
Office SF	2,725,883	1,376,864	1,000,000	Lower
Hotel Rooms	2,554	1,591	900	Lower
Industrial SF	5,565,023	4,898,087	1,100,000	Lower

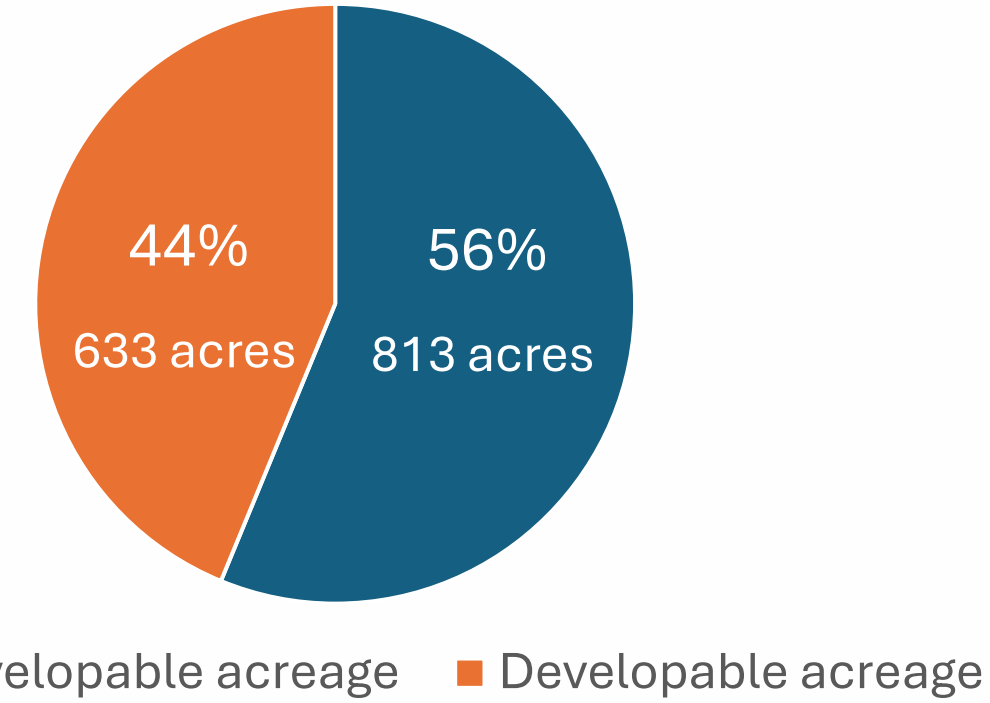


Overall Findings

Developable Acreage in the DA

Totals:

- Overall acreage in the DA: 23,800 acres
- Developable acreage: 1,446 acres (6.1%)
- Vacant developable acreage: 813 of 1,446 acres



2022 Buildout Trend

“In the past five years (2016 through 2021), the County has approved 20 residential rezoning and special use permit applications. When analyzing the actual buildout of these rezoning developments, the total number of units approved was approximately 58% of the maximum number of units recommended per the Comprehensive Plan.

Or said another way, the actual approval of these recent residential rezonings was about 58 percent of the theoretical maximum buildout.”

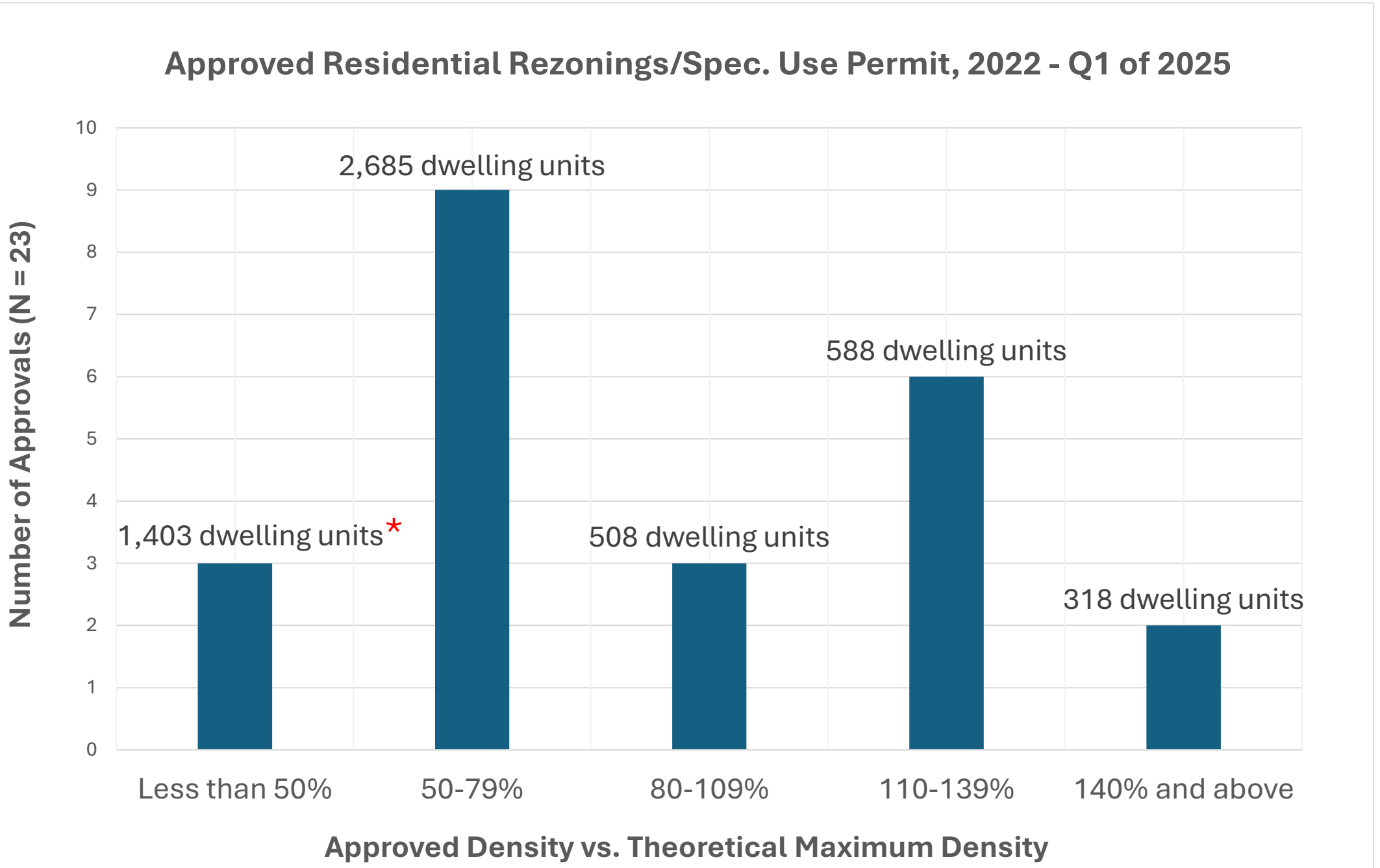


2025 Buildout Trend

From 2022 through Q1 of 2025, the County approved 24 legislative residential applications (23 rezonings and 1 special use permit).

When analyzing the approvals of these residential developments, the total number of units approved was approximately 56% of the theoretical maximum buildout.




Approved Residential Rezonings/Spec. Use Permit, 2022 - Q1 of 2025
Number of Approvals (N = 23)
10
9
8
7
6
5
4
3
2
1
0
2,685 dwelling units
588 dwelling units
1,403 dwelling units*
508 dwelling units
318 dwelling units
Less than 50%
50-79%
80-109%
110-139%
140% and above
Approved Density vs. Theoretical Maximum Density

Constraining Factors

- These figures show *maximum* theoretical capacity. It is very challenging to reach the maximum theoretical buildout throughout the DA.

- The list of constraining factors in the 2022 analysis (pages 50-53) are still relevant and applicable to 2025 analysis.



Opportunities for Further Research

- Strategies to encourage redevelopment broadly
- Planning for redevelopment opportunities associated with Activity Centers (e.g. ordinance changes, etc.)
- Leveraging public investment to encourage private investment
- Evaluating opportunities to align land use map with zoning map
- Recommendations from EDSP, AC44 regarding the review process



Moving from “Report” to “Tool”

- The digitized format of the ‘25 Buildout Analysis provides a new tool for monitoring the utilization of the DA.
- Will assist CDD in serving other departments (e.g. Schools), partner agencies (e.g. utility providers), and County-wide planning efforts (e.g. CIP).
- Opportunity to provide analysis of current development proposals within a broader, longer-term context.



Next meeting

- Review capacity through a market-based lens based on current real estate data like asking rents, vacancy rates, net absorption, deliveries and demolitions.
- Review draft scorecard.
- Respond to questions and feedback received today.





Questions and Feedback