



Martin County 2025 Residential Capacity Analysis

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Introduction/Contact Information

Metro Forecasting Models (MFM) is a consulting firm that works exclusively with local governments to model land uses for long-range planning.

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Introduction

- The County is required to collect and monitor development and population data to ensure sufficient land to address projected population needs.
- This analysis considers population projections, future housing demand, and future supply in order to assure that projected population's housing needs will be met.

Methodology

There are 3 parts to the analysis:

1. Review population projections
2. Determination of future demand
3. Analysis of supply and comparison to projected demand

In 2024, the planning periods were updated to 10 and 20 years.

Analysis includes vacant lands within the primary and secondary USDs.



Determining Future Demand

- Analysis is based on the 2025 Population Technical Bulletin.
- Occupied Housing units (HO) – in use by permanent population
- Vacant Seasonal (HS) occupied less than 6 months
- Housing units in actual use (HU): $HU = HO + HS$
- Vacant housing not in seasonal use shall be used in calculating supply.



Housing Data by Occupancy

- Unincorporated Housing Units by USD CODE and Occupancy
- $HO + HS = HU$

USD CODE	2020 Housing Units	Occupied Units (HO)	Seasonal Units (HS)	Total Units (HU)
1	63,240	53,575	6,140	59,715
2	541	489	26	515
3	2	2	0	2
Total	63,783	54,066	6,166	60,232

- Vacant Housing Units not in Seasonal Use = 2020 Housing Units – HU = 3,551

Projected Growth and Demand

- Martin County Projected Growth

Year	2020(C)	2035(PTB-Med)	2045(PTB-Med)
Population	158,431	178,100	185,100
% Change since 2020 Census (C)		12.41%	16.83%

- Projected Housing Unit Demand by Horizon Year

	2020 HU	% Increase	Projected HU Demand
10-Year Horizon	60,232	12.41%	7,478
20-Year Horizon	60,232	16.83%	10,139

Distribution of Housing

- Historic Distribution of New Housing by Location

USD	2020	2021	2022	2023	2024	Total	Average	%
Eastern Primary	274	323	194	571	616	1978	396	76.79%
Eastern Secondary	34	62	68	88	69	321	64	12.46%
Outside	28	31	49	105	63	276	55	10.71%
Western Primary	0	0	0	0	0	0	0	0.00%
Western Secondary	1	0	0	0	0	1	0	0.04%
Total	337	416	311	764	748	2576	515	100.00%

- Future Allocation of Residential Demand by USD

USD	5-Year % Ave	2035 Demand	2045 Demand
Eastern Primary	76.79%	5,742	7,785
Eastern Secondary	12.46%	932	1,263
Outside	10.71%	801	1,086
Western Primary	0.00%	-	-
Western Secondary	0.04%	3	4
Total	100%	7,478	10,139

Residential Supply to Meet Demand

1. Vacant property that allows residential use.
2. Subdivided single family and duplex lots.
3. Potential for residential development in Mixed Use Overlays.
4. Excess vacant housing not in use by permanent or seasonal residents.



Excess Vacant Units & Their Distribution

- Excess Vacant Units

Excess Vacant Residential Units	
	Units
Vacant Housing Units NOT in Seasonal Use	3,551
3% of Housing Units in Use (HU)	1,807
Vacant Housing Units less 3% HU	1,744

- Allocation of Excess Vacant Units

Allocation of Excess Vacant Units by USD		
Urban Services District	% Allocation	Excess Vacant Units
Eastern Primary	76.79%	1,339
Eastern Secondary	12.46%	218
Outside	10.71%	187
Total	100%	1,744

Summary of Potential Units

Vacant Land Analysis

Summary of Eastern Primary and Secondary Units		
Urban Services District	Primary USD	Secondary USD
Units on Vacant Lands @ Max Density	1,890	466
Approved Projects with Units	5,621	172
Sub Totals	7,511	638
Total Units	8,149	

Lot Analysis

Vacant Lots Developed Pre 1982	
Urban Services District	Lots
Lots in Primary	448
Lots in Secondary	0
Total	448

Vacant Lots Developed Post 1982	
Urban Services District	Lots
Lots in Primary	176
Lots in Secondary	0
Total	176

Future Housing Supply

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Summary of Potential Units		
Supply of Units in Urban Service District from Policy 4.1D.5	Supply of Units in Primary USD	Supply of Units in Secondary USD
Vacant Land	1,890	466
Pre-1982 Lots	448	-
Post-1982 Lots	176	-
CRAs	2,063	-
Excess Vacancy	1,339	218
Approved/Undeveloped	5,621	172
Total	11,537	856

Future Housing Supply

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Demand versus Supply Analysis

- Demand versus Supply Analysis for planning period 2025-2035

Demand versus Supply Analysis for Planning Period 2025-2035			
Eastern USDs	2035 Demand	Unit Supply	Percent of Need in the 10-year Planning Period
Eastern Primary	5,742	11,537	201%
Eastern Secondary	932	856	92%
Total	6,674	12,393	186%

- Demand versus Supply Analysis for Planning Period 2025-2045

Demand versus Supply Analysis for Planning Period 2025-2045			
Eastern USDs	2045 Demand	Unit Supply	Percent of Need in the 20-year Planning Period
Eastern Primary	7,785	11,537	148%
Eastern Secondary	1,263	856	68%
Total	9,048	12,393	137%

Conclusion

10 Year Horizon

- Eastern Primary – 201% of demand
- Eastern Secondary - 92% of demand

20 Year Horizon

- Eastern Primary – 148% of demand
 - Eastern Secondary – 68% of demand
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Quality Data leads to quality decision making.

Quality Decisions lead to optimized return on your Capital Investments.



QUESTIONS?

PLEASE CONTACT US FOR
MORE INFORMATION.

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