

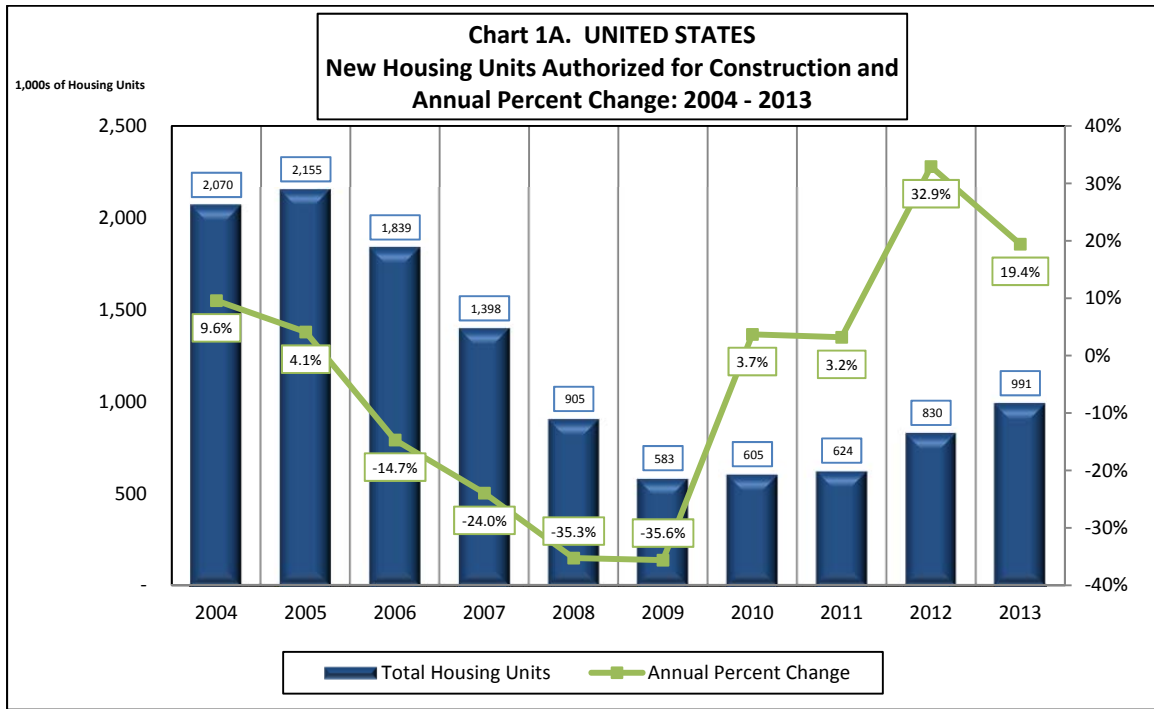
NEW HOUSING UNITS AUTHORIZED FOR CONSTRUCTION BY BUILDING PERMITS

Summary of Findings: 2013

Building permit activity continued to improve nationally and in Maryland in 2013. New housing unit construction has now risen for four straight years since the 2009 low point. One characteristic of this recovery is the increasing share of multi-family housing units since 2009.

United States¹

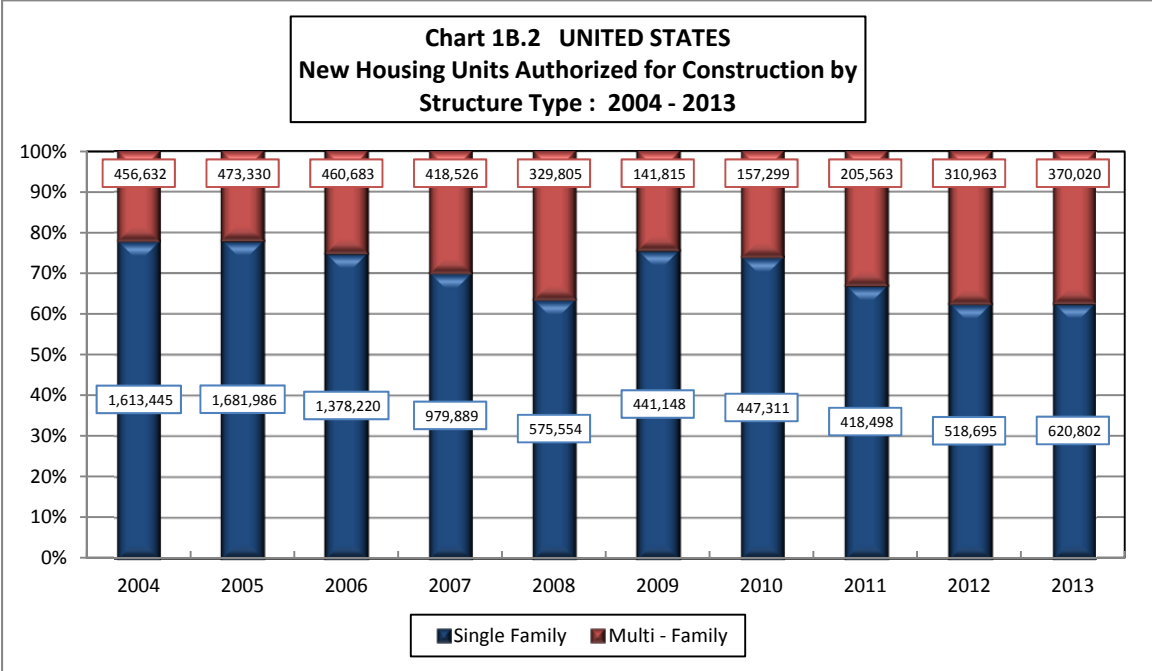
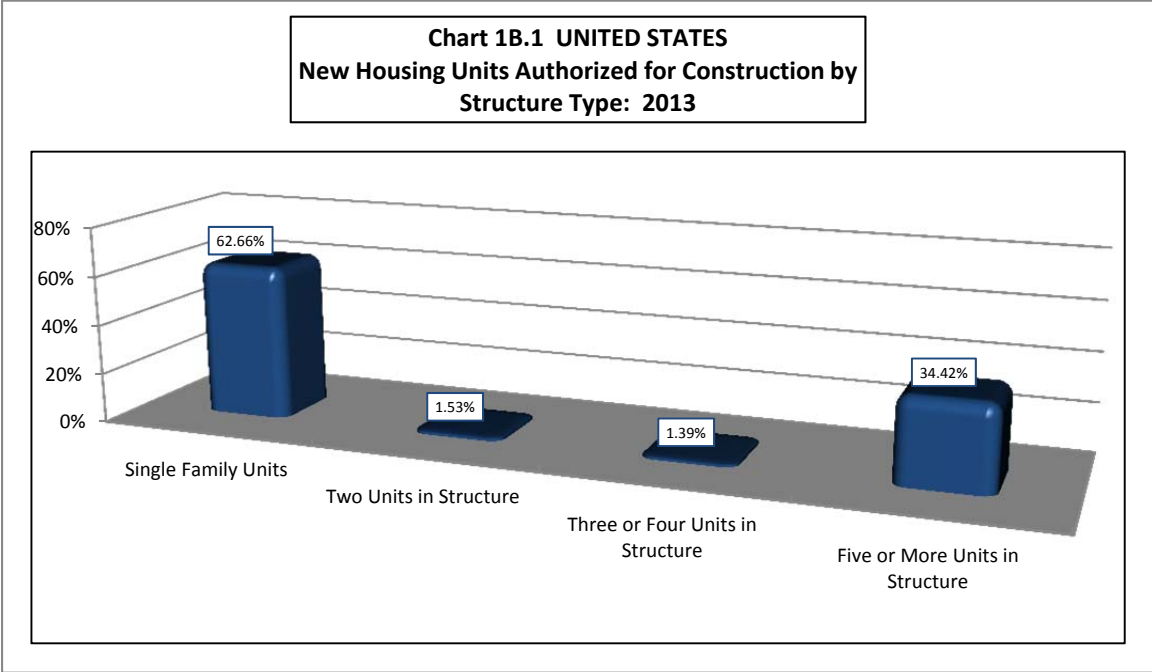
Permit issuing places in the United States authorized 990,822 new housing units for construction during 2013. This is an increase of 161,164 units (19 percent), over the 829,658 units authorized during 2012. This is the fourth consecutive year that net new residential construction has increased. The low point of new home construction over the past 10 years is 2009, the year marking the end of the global recession that began in 2007.



While total new home building is rising, one segment of new construction appears to be stalling. Increases in new single family housing construction have fluctuated since 2010. Of all new housing units authorized during 2013, 620,802 are new single family homes. This accounts for 63 percent of all new residential development. Although this is an increase from the previous

¹ See Charts 1A; 1B.1; 1B.2; and 1C.

year when 518,695 new homes were permitted, the percentage increase in single family home construction dropped from 33 percent in 2012 to just fewer than 20 percent in 2013.



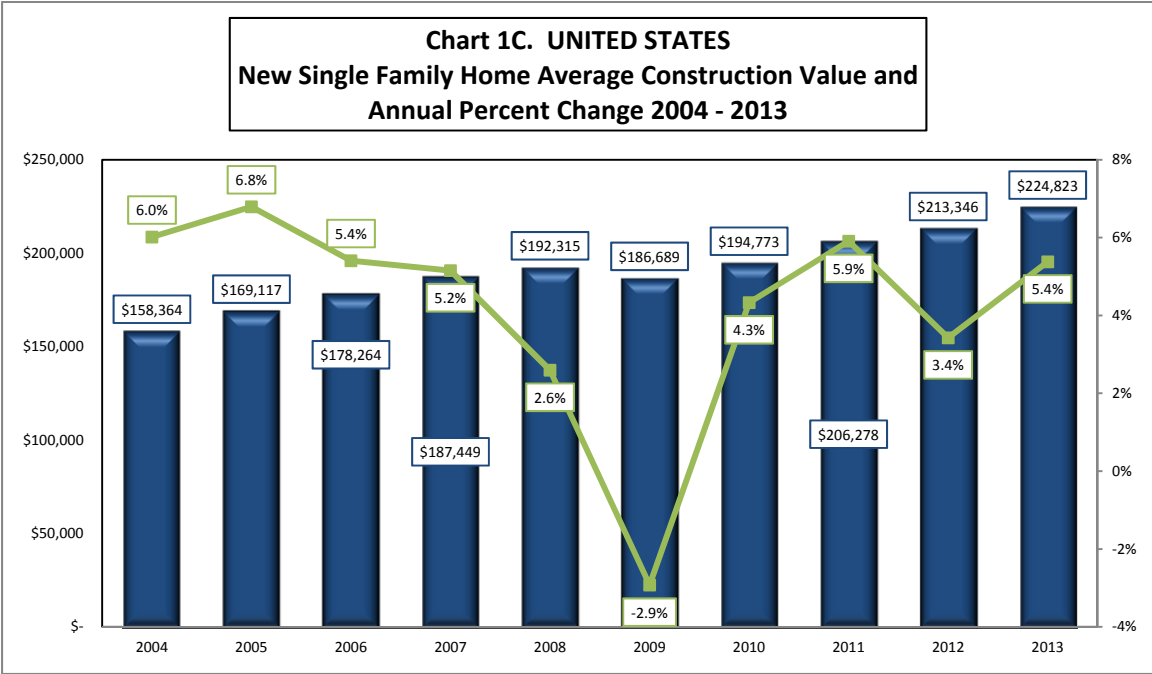
Contributing to the overall net increase in total annual housing production is strong multi-family housing development activity. These dwelling units account for 37 percent of the new housing

construction during 2013 (370,020 new units). Multi – family housing units are units built in structures containing two or more housing units. The vast majority of these structures are typically apartment and condominium buildings containing five or more units.

New multi-family housing has risen as a proportion of all new residential housing construction from just under 22 percent during 2004 to 37 percent of the nation’s new housing inventory since 2012.

Nationally, the value of all new housing construction authorized in 2013 is placed at \$177.6 billion. This is 27 percent higher than 2012, when the value of construction was reported at \$140.4 billion.

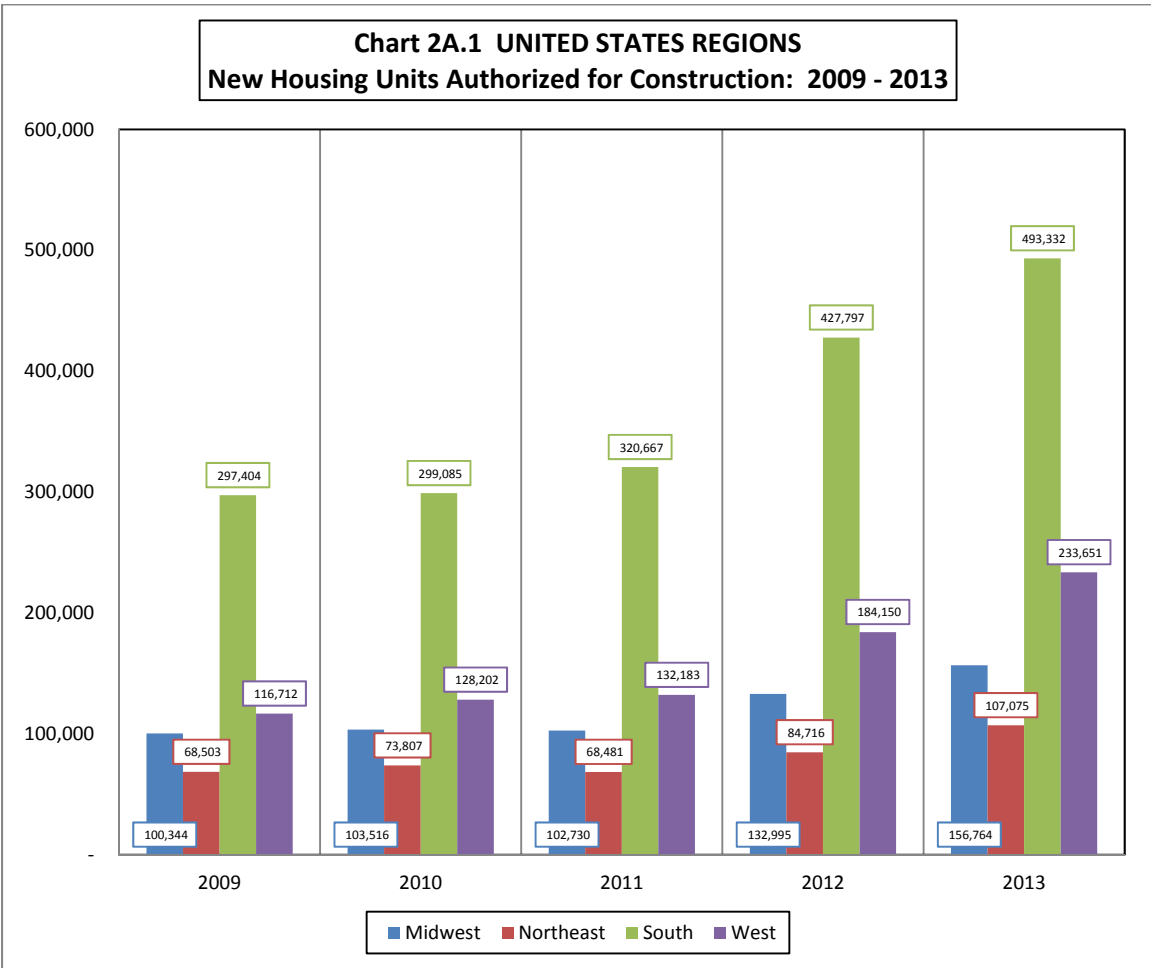
The value of new single family home construction is placed at \$139.6 billion. The average construction value of a new home nationally has shot up in recent years. The 2013 average construction cost for a new single family home is \$224,823. This is five percent higher than the average cost in 2012, and 15 percent higher than the average construction value in 2010.



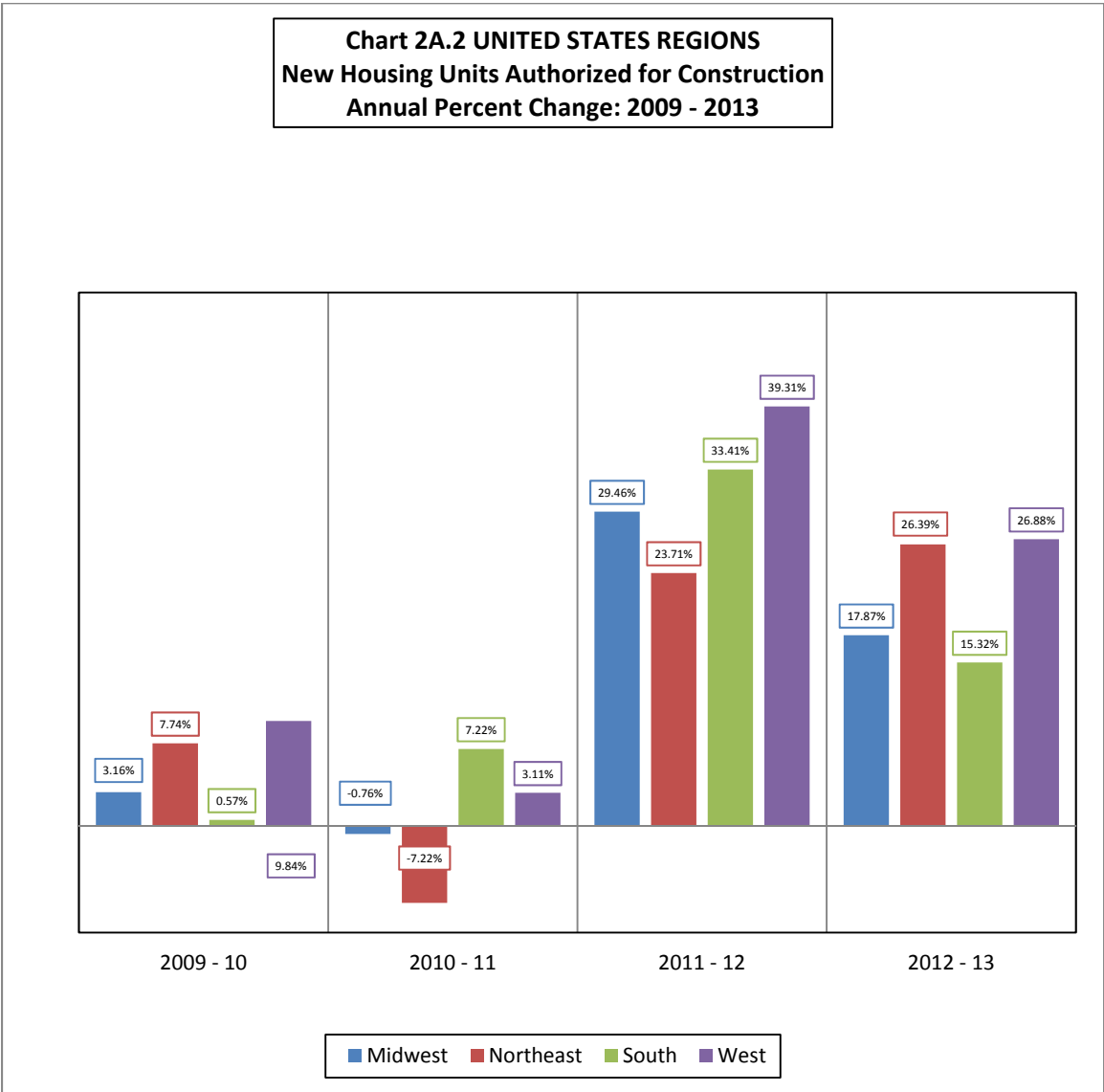
Nationally the value of new multi-family housing construction is placed at \$38.1 billion. Just over 92 percent of new multi-family housing authorized during 2013 is for units in apartment and condominium buildings containing five or more units. The value of these buildings is placed at \$34.7 billion.

United States Regions²

The South Region of the United States is the nation’s largest home builder, with permit issuing places in these states authorizing 493,332 new housing units during 2013. Of these, 330,028 (67 percent) are single family housing units and 163,304 (33 percent) are multi – family housing units.



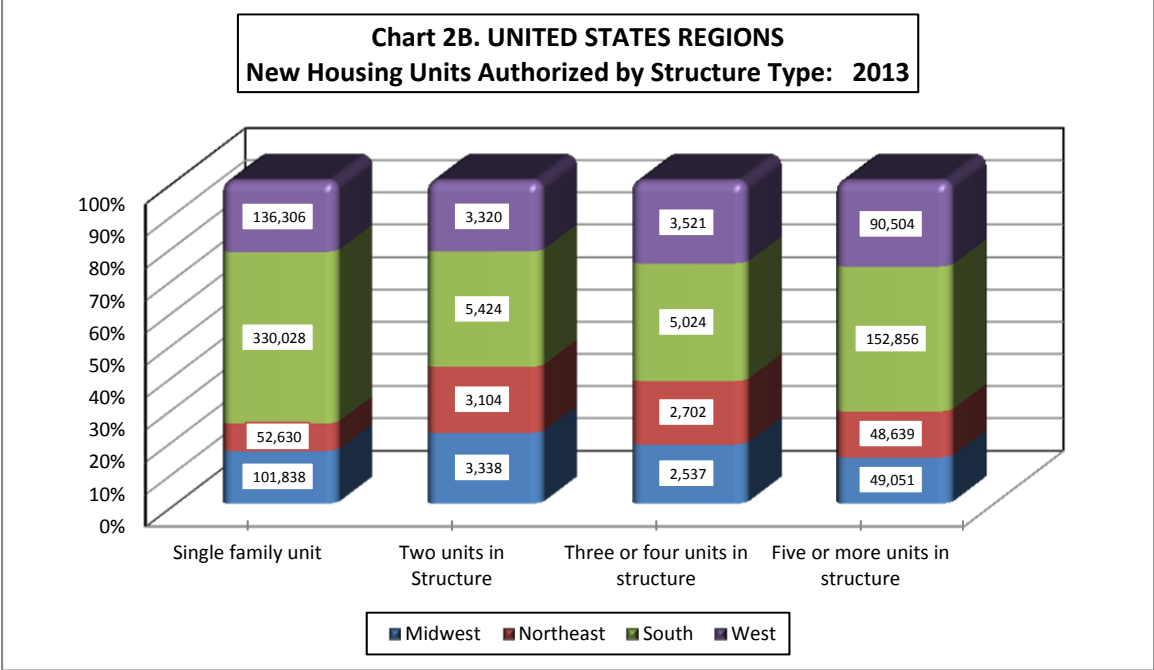
² http://www.census.gov/geo/reference/gtc/gtc_census_divreg.html
See Charts 2A.1; 2A.2; 2B; and 2C.



The South also experienced the highest net increase in total new housing unit home construction (65,535 new housing units or 15 percent) from 2012.

The total value of construction for new housing units authorized in states of the South Region is \$82.5 billion. For single family homes, the aggregate value of construction is \$69 billion, making the average construction cost for a single family home \$208,980. This is seven percent lower than the national average of \$224,823.

The total value of new multi-family housing units authorized for construction in the South Region is \$13.5 billion. Ninety-four percent of all new multi-family housing in the South is apartment or condominium developments. These buildings are valued at \$12.4 billion.

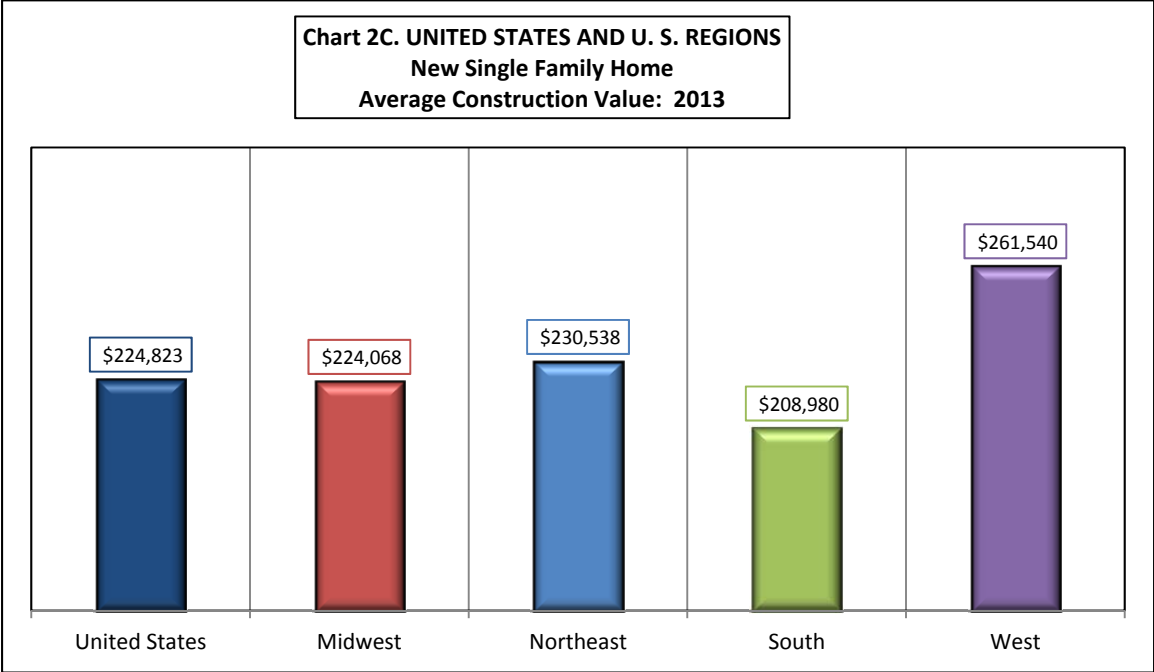


West Region permit issuing places authorized the construction of 233,651 new housing units during 2013, a 27 percent over the 184,150 new units authorized in 2012. This is the highest percent increase in residential construction from 2012 to 2013 of any region. The total value of construction for new housing units authorized in the West Region is \$49 billion.

Single family housing accounts for 136,306 new units, or 58 percent, of new residential construction activity in the Region. The value of single family home construction is placed at \$35.6 billion. The average construction cost for a new single family home in these states is \$261,540. This is 16 percent higher than the national average construction cost of \$224,823.

West Region States authorized 97,345 new multi-family housing units for construction. The value of construction for these units is placed at \$13.4 billion. There are 90,504 housing units (93 percent of all multi-family housing units) authorized for construction in buildings containing five or more units. This construction is valued at \$12.4 billion. During 2010 and through 2011, two Regions experienced declines in housing production, the Midwest Region and the Northeast Region. This came just after the onset of the Nation’s economic recovery. Since then however, both regions have experienced substantial increases in building activity.

States in the Midwest Region authorized 156,764 new housing units for construction during 2013. This is 23,769 more units than 2012 and an increase of 18 percent. The total value of construction for new housing units authorized in the Midwest is \$27.9 billion.



Single family housing accounts for 101,838 new units or 65 percent of new residential construction activity in Midwest Region States. The value of single family home construction is placed at \$22.8 billion. The average construction cost for a single family home is \$224,068, roughly equivalent to the national average construction value of \$224,823.

In Midwest Region States, there are 54,926 new multi-family housing units authorized for construction during 2013. The total value of this construction activity is placed at \$5.1 billion. Almost ninety percent of this construction (49,051 units) is for buildings containing five or more units. These buildings are valued at \$4.4 billion.

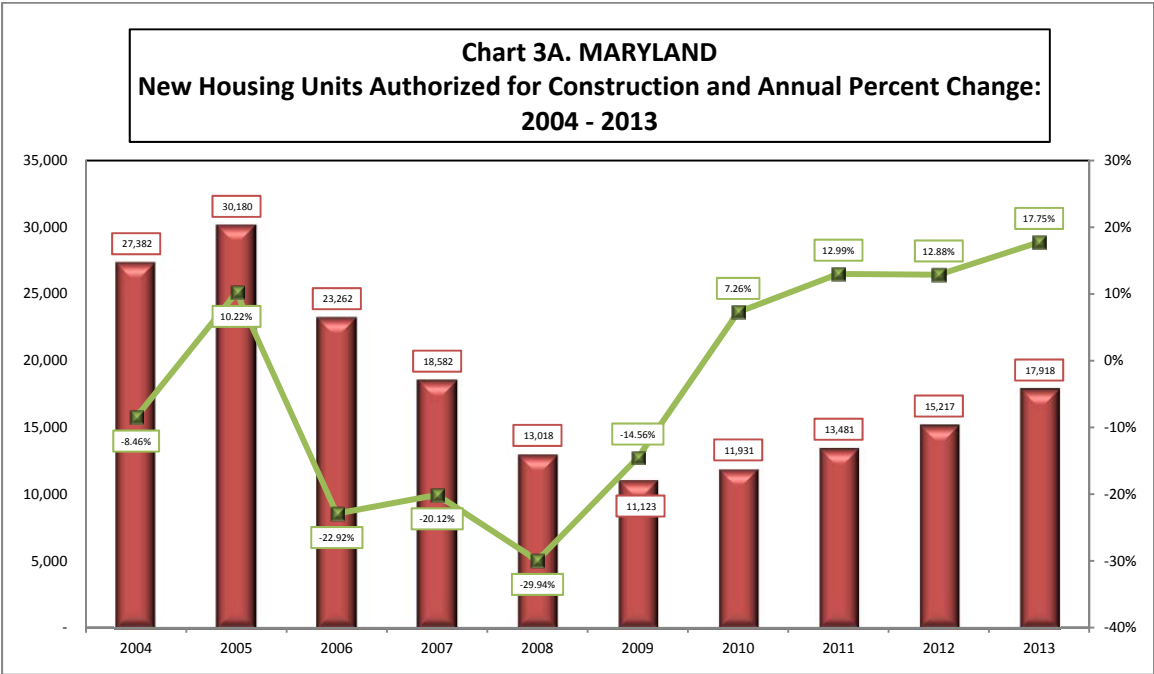
The Northeast Region of the United States also showed a considerable increase in residential construction activity following the 2010 through 2011 period. Permit issuing places in these states authorized 107,075 new units in 2013. This is 22,359 more units than 2012, and represents an increase of 26 percent. The total value of construction for new housing units authorized in the Northeast Region is \$18.3 billion.

The Northeast is the only region to authorize fewer single family housing units than multi-family housing units. There are 52,630 (49 percent) new single family housing units authorized for construction in these states during 2013. The average construction cost for a single family home in the Northeast Region is \$230,538. This is almost three percent higher than the national average of \$224,823.

The Northeast Region authorized 54,445 new multi-family housing units for construction valued at \$6.1 billion. Nearly ninety-percent of these (48,639 units) are in buildings containing five or more units. These multi – family buildings have a value of construction placed at \$5.5 billion.

State of Maryland³

For the fourth year in a row, new home construction in Maryland increased over levels from the previous year. During 2013, Maryland building permit offices authorized the construction of 17,918 new housing units, up 2,701 units (just under 18 percent) from the 15,217 housing units authorized in 2012.



The 2013 construction cost or value of new residential units in Maryland is placed at \$2.8 billion. This is over \$400 million higher (17 percent) than the value of new residential construction in 2012.

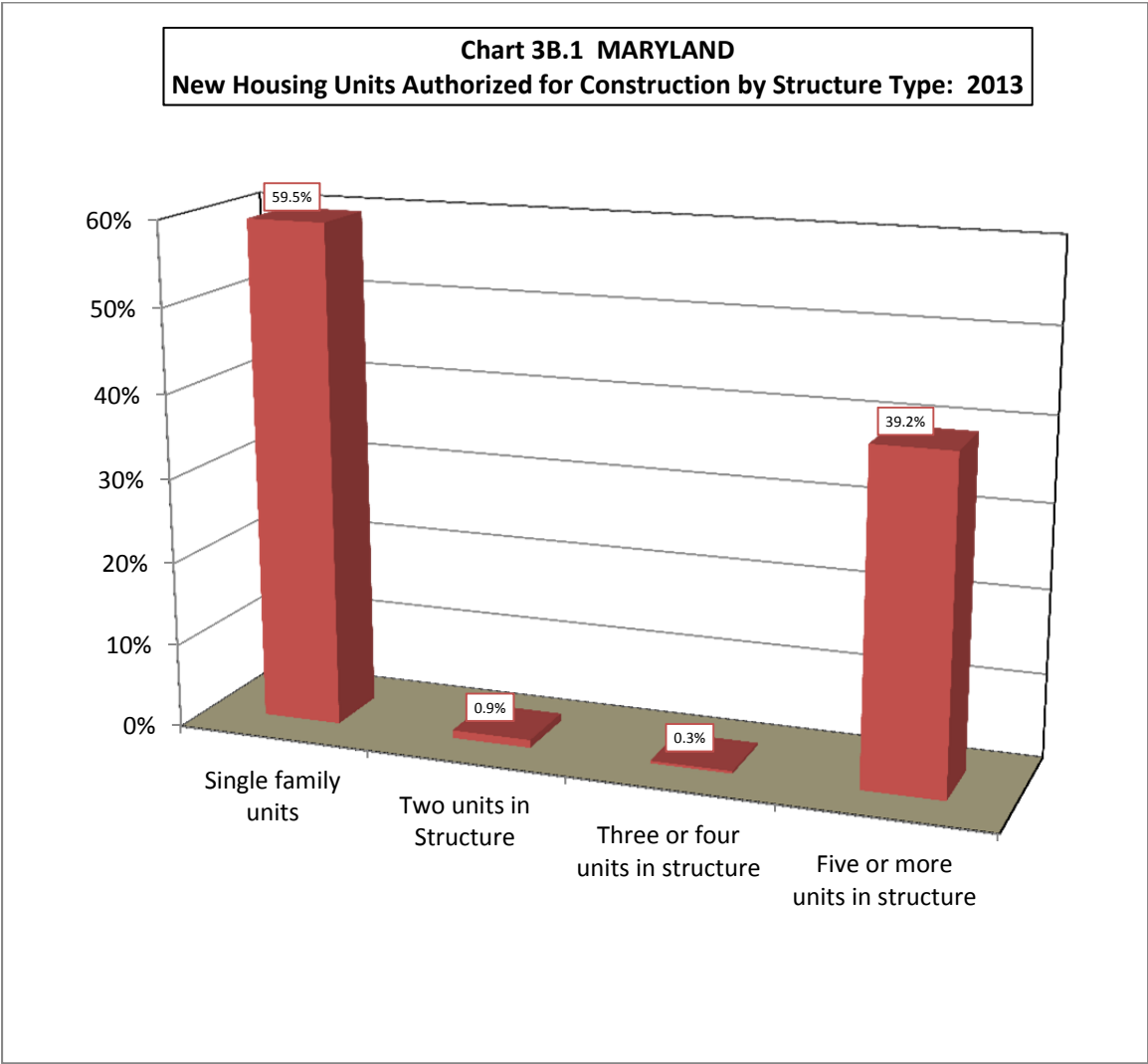
Single family home construction is the largest component of Maryland’s new residential development. State permit issuing places authorized the construction of 10,667 new single family units during 2013, an increase of 1,435 units (16 percent) over the 9,232 single family homes authorized for construction in 2012. These new homes also signify the State’s highest annual number of new single family homes built since 2007, when 13,232 new single family homes were built.

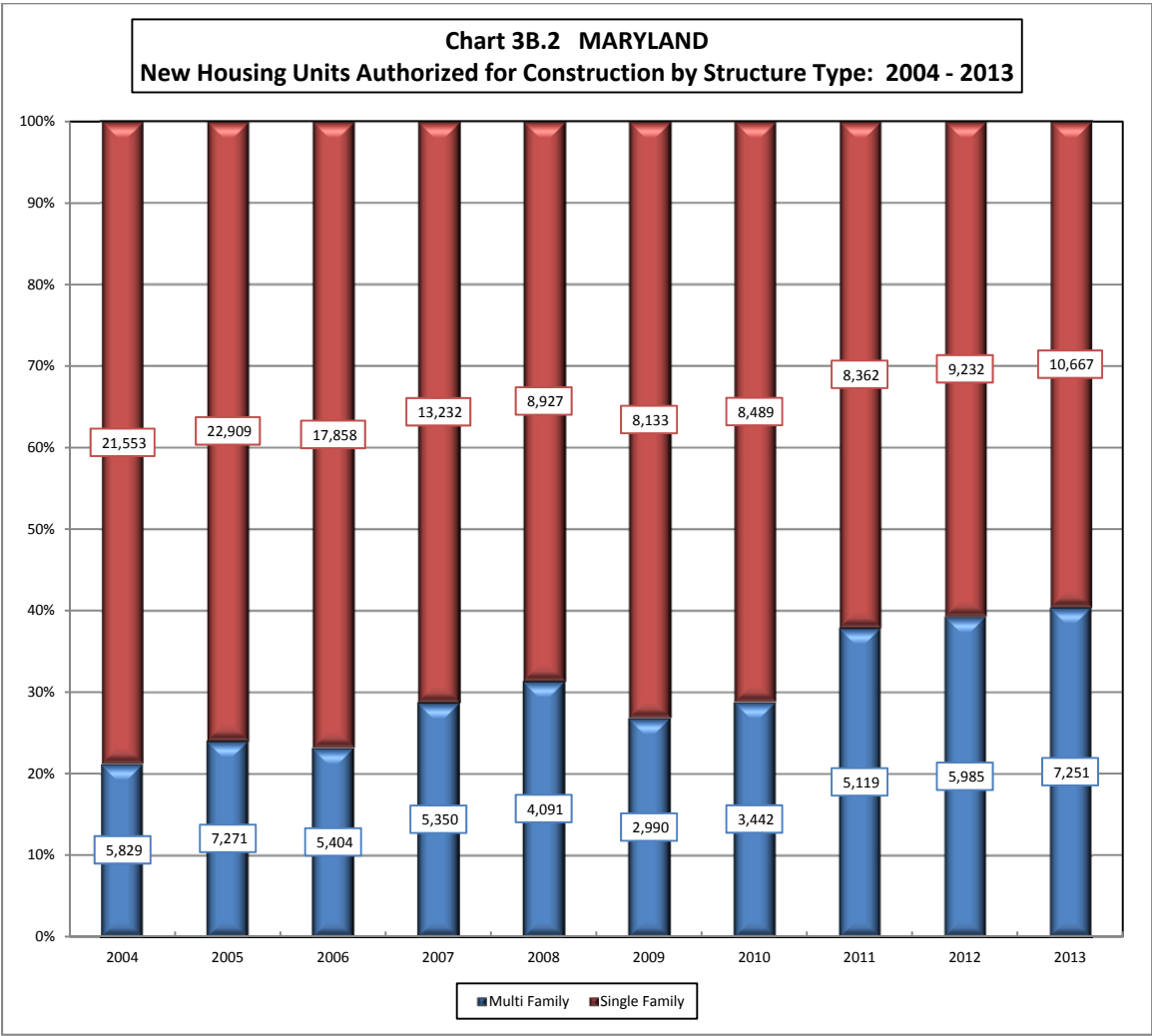
New single family homes currently account for 60 percent of the State’s new housing construction. This is the lowest proportion of single family housing built in the State during the 2000s, and the fourth consecutive year that the ratio of single family housing units to total units

³ See Charts 3A; 3B.1; 3B.2; and 3C.

has fallen. Nationally, new single family home construction accounts for 63 percent of all new housing construction during 2013.

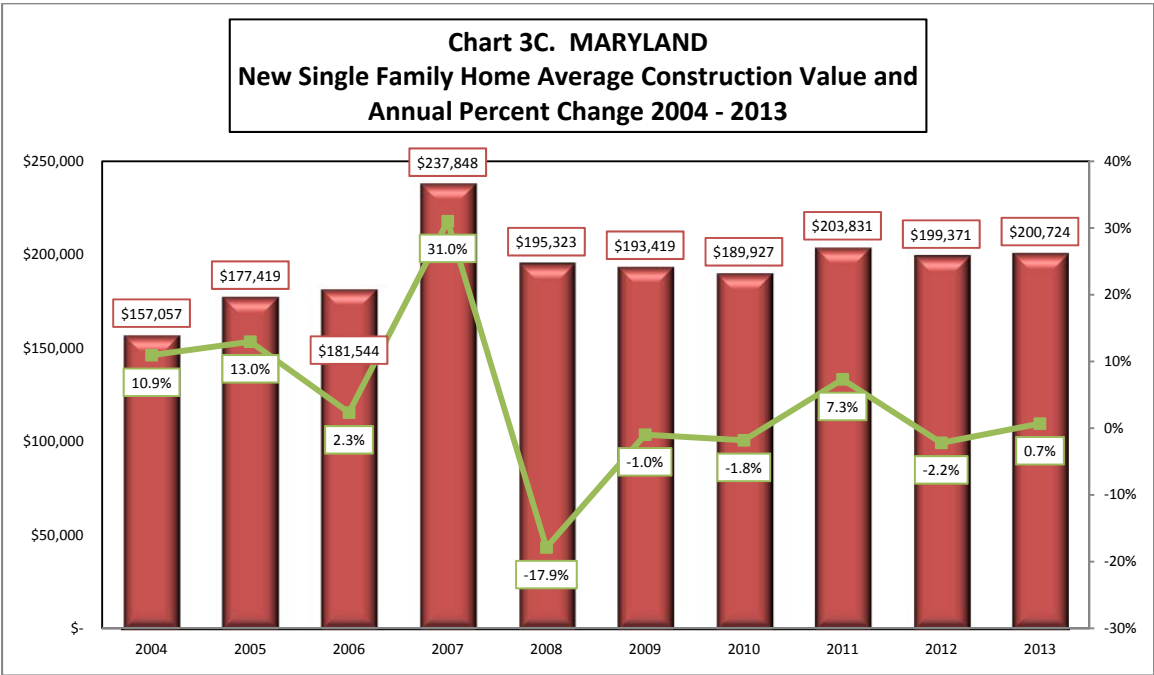
From 2000 through 2006, Maryland single family homes accounted for almost eight of ten new homes built. Once the national recession of 2007 – 2009 hit, the State’s annual average proportion of single family homes fell rapidly. In 2009, single family homes accounted for 73 percent of all new units. This percentage declined to 71 percent in 2010, 62 percent in 2011 and 61 percent in 2012.





New single family housing units have a construction value placed at \$2.1 billion during 2013. This is 76 percent of the value of all new housing unit construction in the State and 16 percent higher (over \$300 million), than the \$1.8 billion construction cost reported in 2012.

The average construction cost or construction value of a new single family home in the State is \$200,724. This is slightly higher (just under one percent) than the mean construction value in 2012. Since 2010, Maryland homebuilding costs are considerably lower than the national average. The U. S. average value of building a new single family housing unit (\$224,823) is 11 percent higher than the 2013 Maryland mean construction cost.



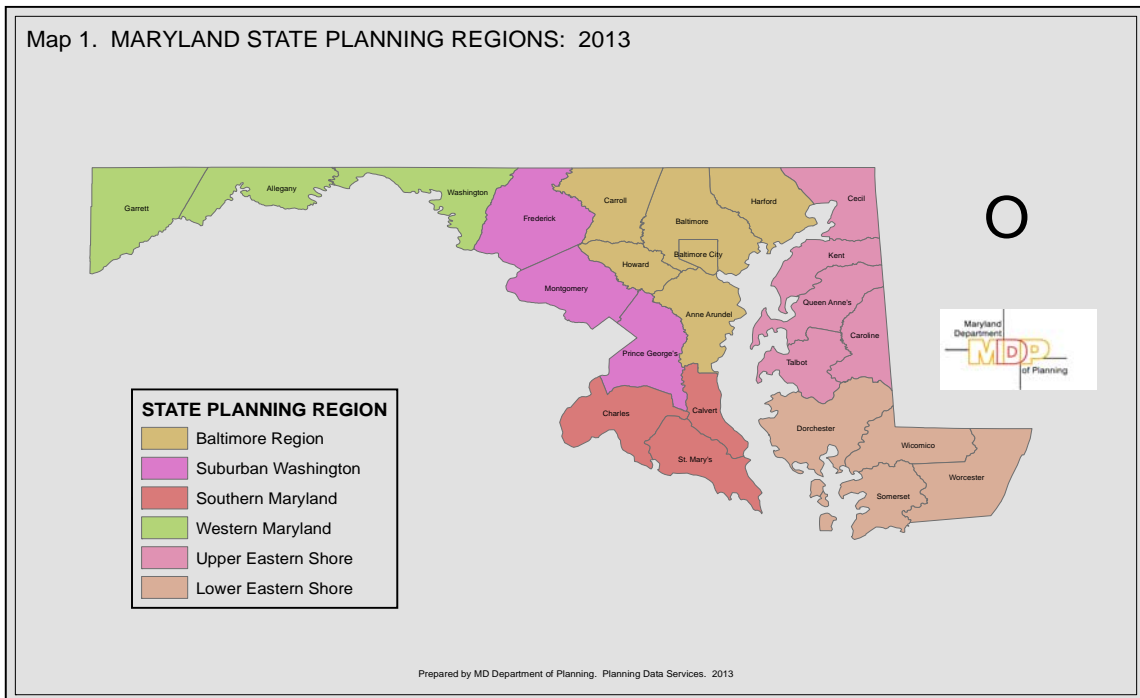
Maryland multi-family housing continues to grow faster than single family housing. There are 7,251 multi-family housing units authorized for construction during 2013, a 21 percent increase over 2012 when 5,985 multi-family units were authorized for construction. It is also the highest annual multi-family construction total since 2005, when 7,271 new multi-family housing units were built. The 2013 value of new multi-family housing unit construction is placed at \$636.7 million. This is up \$100.8 million (18 percent) from 2012.

Currently, 40 percent of the State’s new residential construction activity is geared to producing multi-family housing. During 2013 the largest component of Maryland’s new multi-family housing construction is the production of units in buildings containing five or more units (97 percent or 7,029 units). Typically these buildings are garden style or hi-rise apartments or condominiums. The construction value of these developments is \$636.7 million, an increase of \$84.6 million or 15 percent from 2012.

Regional Housing Development: 2013⁴

Maryland’s six State Planning Regions are titled Baltimore, Lower Eastern Shore, Southern Maryland, Suburban Washington, Upper Eastern Shore and Western Maryland. The State Planning Region components jurisdictions are displayed on Map 1.

⁴ See Figure 1 and Charts 4A.1; 4A.2; 4B; 4C.1 and 4C.2.



Baltimore State Planning Region

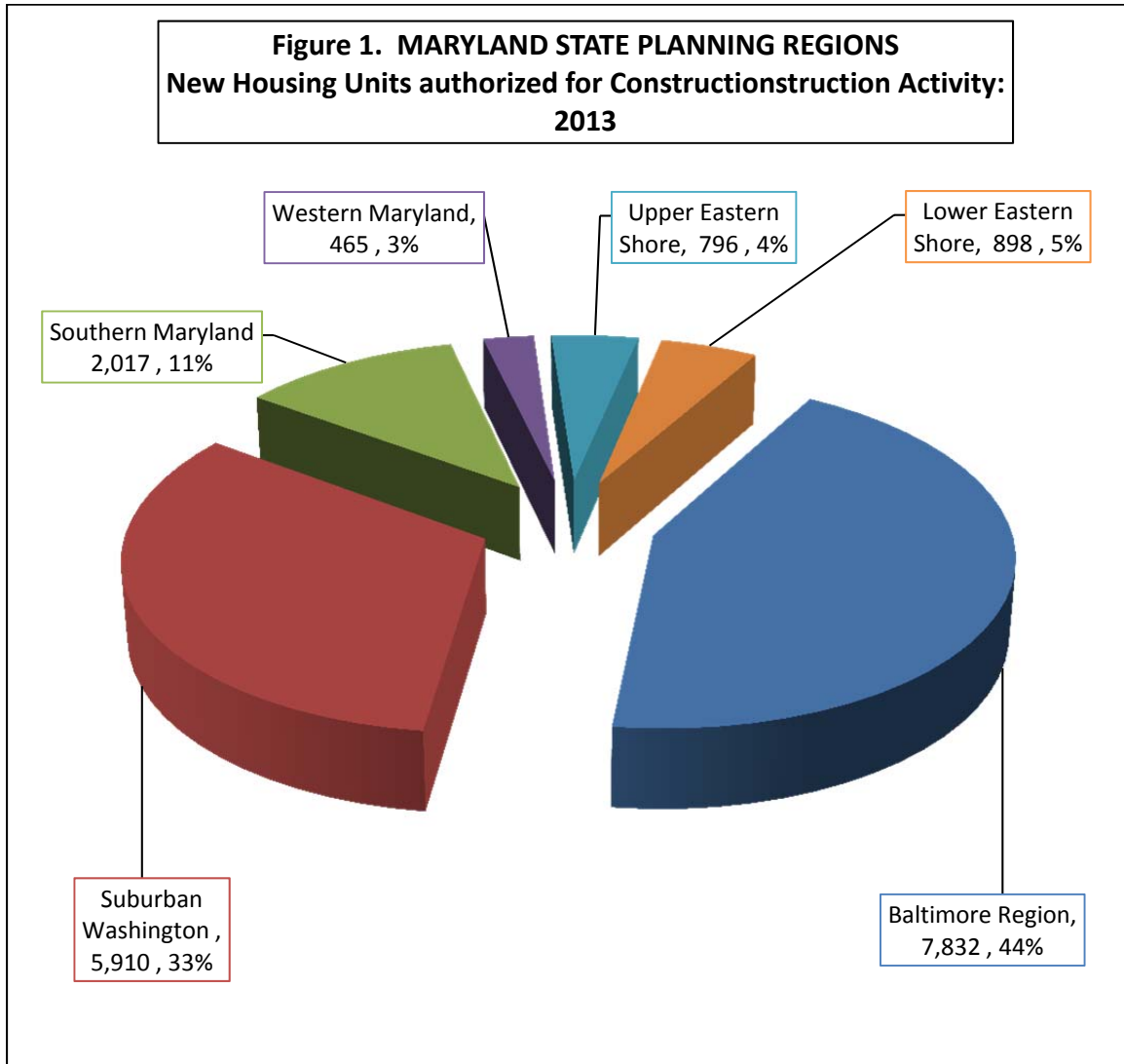
Of all Maryland State Planning Regions, the Baltimore Region has the largest population. Comprised of Anne Arundel, Baltimore, Carroll, Harford and Howard Counties and Baltimore City, the region hosts 2,722,221 residents according to estimates from the U. S. Bureau of the Census' 2013 Population Estimates. These jurisdictions account for 46 percent of the State's total population of 5,928,814 persons.

During 2013, Baltimore State Planning Region permit issuing places authorized 7,832 new housing units for construction. This is an increase of 2,060 units (36 percent), from the previous year. Almost 44 percent of the State's new residential construction activity takes place in the Baltimore State Planning Region. Howard and Anne Arundel Counties authorized most of the Region's building activity with 2,267 and 1,851 new housing units, respectively.

The value of the Region's new home building is placed at \$1.2 billion. This is the highest total value for new residential construction of any State Planning Region. It represents just over 42 percent of State's total cost of new residential construction of \$2.8 billion.

There are 4,414 new single family housing units authorized for construction during 2013 in the Baltimore State Planning Region. Single family housing accounts for 56 percent of the Region's new housing. The average construction value of a new single-family home is \$194,496. This is

about three percent lower than the mean cost Statewide (\$200,724), and ranks fifth among the six State Planning Regions.

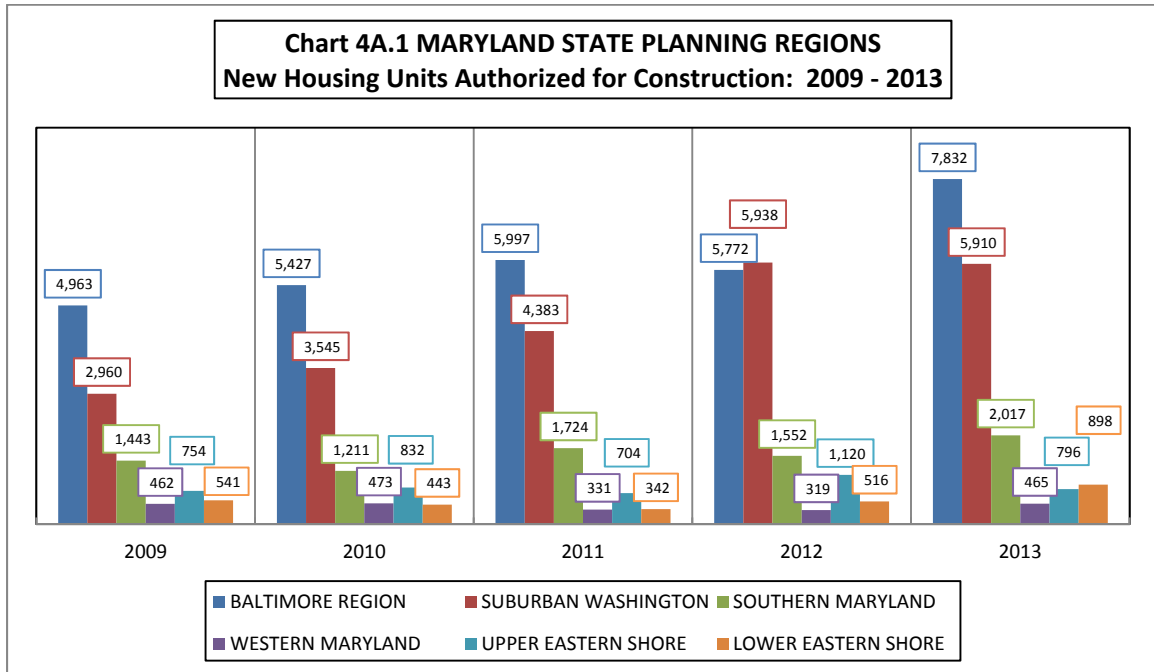


Permit issuing places in the Baltimore State Planning Region authorized 3,418 new multi-family units for construction in 142 buildings during 2013. This is 47 percent of all new multi-family units Statewide. Region jurisdictions authorizing the highest number of multi-family housing units include Baltimore City (1,037 units) and Howard County (1,032 units).

The value of multi-family housing construction is placed at \$340,438,367 or 51 percent of the State's new multi-family housing unit construction value. Over 95 percent of these units (3,261 dwellings or 95 percent) are in buildings containing five or more units.

Suburban Washington

The Suburban Washington State Planning Region has the second highest population in the State with 2,148,167 residents according to 2013 population estimates from the U. S. Bureau of the Census. Consisting of Montgomery, Prince George’s, and Frederick Counties, this region contains 36 percent of the State’s total population.

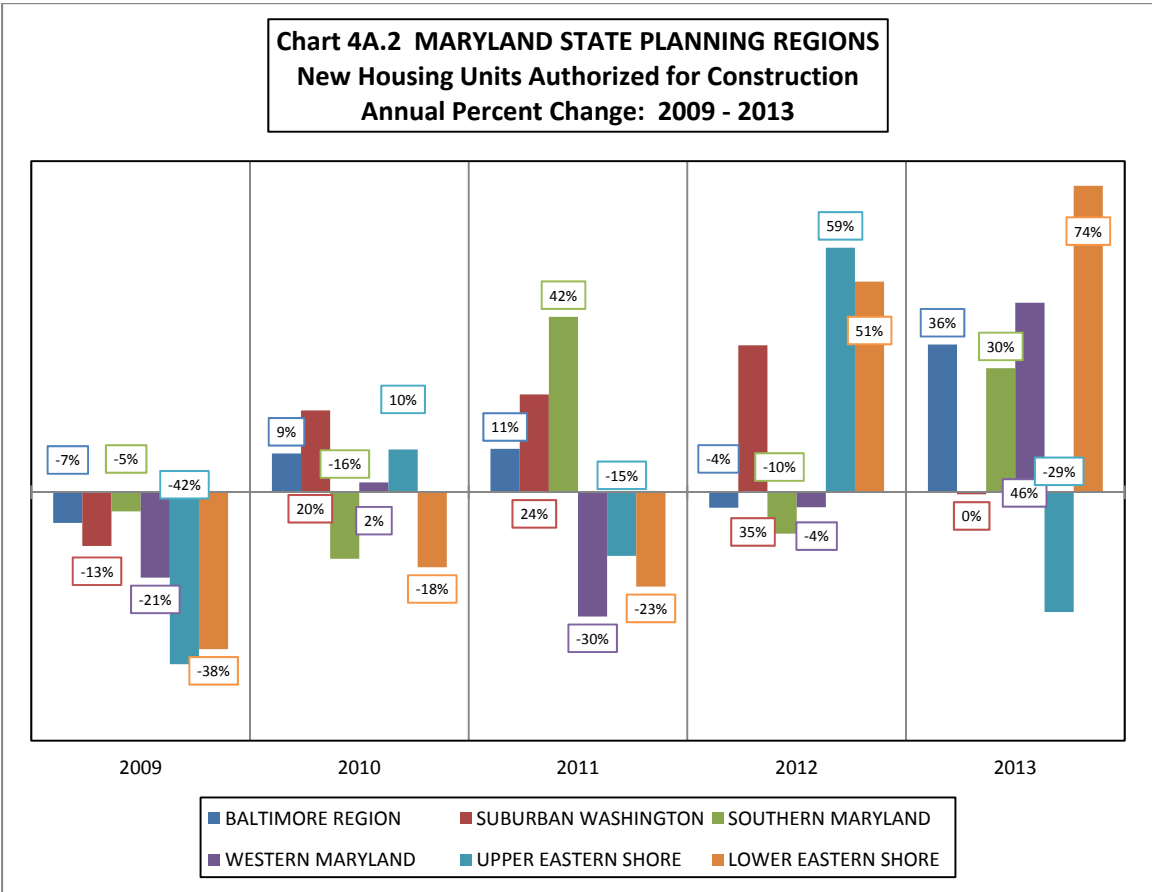


Permit issuing places in Suburban Washington authorized 5,910 new housing units for construction during 2013, accounting for 33 percent of the State’s new residential construction activity. Most of these new dwellings (3,514 housing units) will be built in Montgomery County.

Suburban Washington’s 2013 housing construction is a decrease of 28 units over 2012 totals. The 2013 value of the Region’s new residential construction is placed at \$944 million or 34 percent of the State’s aggregate value of new residential construction.

Just over 60 percent of the new housing units authorized for construction in Suburban Washington (3,550 new homes) are single family housing units. This accounts for one-third of the State’s new single family housing units during 2013.

The average construction cost for a new single-family home in Suburban Washington is \$203,544. This is the third highest average construction cost for a new single family house among the State’s six state Planning regions, and is just over one percent higher than the State average of \$200,724.



There is a high level of multi-family housing construction activity reported by the State’s Suburban Washington State Planning Region’s permit issuing places. The 2,360 new multi-family housing units authorized in the Suburban Washington region accounts for nearly a third of the 7,251 new multi-family housing units authorized for construction Statewide.

The value of new multi-family housing unit construction in the Suburban Washington State Planning Region is placed at \$222 million. This too, is nearly a third of the State’s total value of new multi-family housing developments.

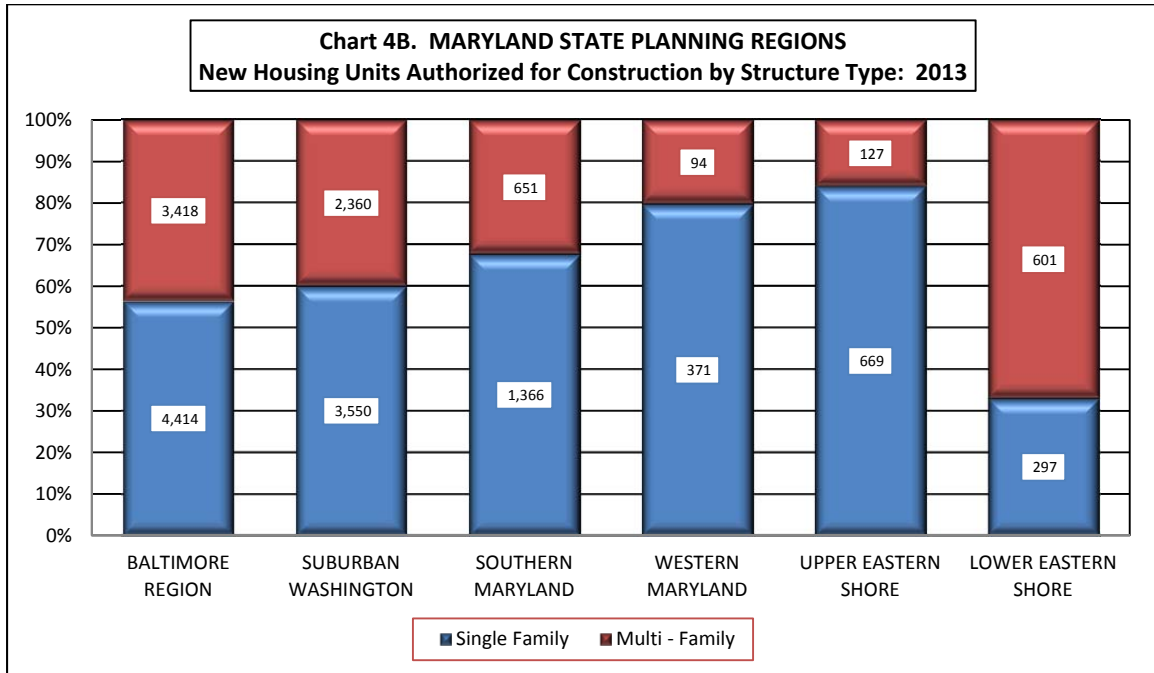
Most of Suburban Washington’s new multi-family construction activity takes place in Montgomery County. Almost eight of 10 new multi-family units built in the region are placed in there (1,862 new dwellings), and nearly all (98 percent or 1,816 new dwellings) will be in buildings containing five or more units.

In Frederick all of the new multi-family housing is in buildings containing five or more units (498 new units). Prince George’s County did not report any new multi-family housing units authorized for construction during 2013.

Southern Maryland

The Southern Maryland State Planning Region comprises Calvert, Charles and St. Mary’s Counties. According to 2013 population estimates from the U. S. Bureau of the Census, the Region is home to 352,981 persons, accounting for six percent of the State’s total population of 5,928,814 persons.

During 2013, the Region’s permit issuing places authorized 2,017 new housing units for construction, 465 more new units than the 1,552 units authorized during 2012, for an increase of almost 30 percent. Southern Maryland accounts for 11 percent of the State’s total new housing construction activity for the year, and the value of new housing construction in the Region is placed at \$338 million.

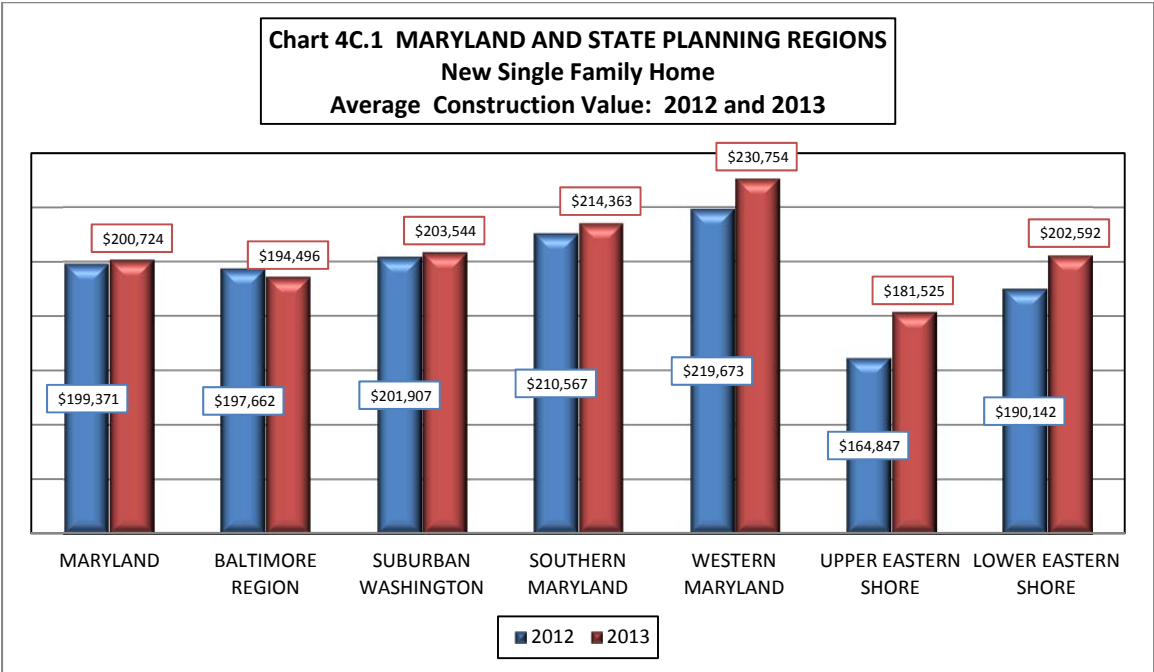


Most new housing in this Region (69 percent) will be built in Charles County, where permit issuing places authorized 1,391 new housing units. Just over two-thirds (1,366 new single family housing units) of Southern Maryland’s new residential construction is made up of single family homes. The average construction value for a new house is \$214,363, second among State planning regions, and is seven percent higher than the statewide average cost of \$200,724.

In 2013 Southern Maryland authorized the construction of 651 new multi-family housing units valued at \$45 million. Charles County permit issuing places authorized the construction of 649 units in buildings containing five or more units. The two remaining units will be built in a duplex building, in St. Mary’s County and valued at \$167,632.

Western Maryland

The Western Maryland State Planning Region is composed of Allegany, Garrett and Washington Counties. These counties contain 252,998 persons, or four percent of the State’s population according to 2013 population estimates from the U. S. Bureau of the Census. Permit issuing places in these jurisdictions authorized 465 new housing units during 2013, or just fewer than three percent of the State’s new housing construction.



Housing production in Western Maryland is an increase of 146 units (46 percent) in new residential construction activity compared to the number of housing units authorized for construction in 2012. Three-fourths of the new housing units will be built in Washington County (351 dwellings).

The 2013 value of new residential construction in the region is placed at \$94 million. This is three percent of the State’s new housing unit construction value. It is also an increase of over 35 percent from the value of construction the previous year (\$69 million).

The mean cost for building a new single family home in the Western Maryland Region is \$230,754, fifteen percent higher than the State’s average construction cost of \$200,724, the highest value in the State. Garrett is ranked first in the State with an average value of construction placed at \$324,048, whereas Allegany (\$221,500) and Washington (\$208,720) counties rank sixth and eighth, respectively.

The high value of Garrett's single family construction is most likely tied to the construction of vacation homes in the vicinity of Deep Creek Lake.

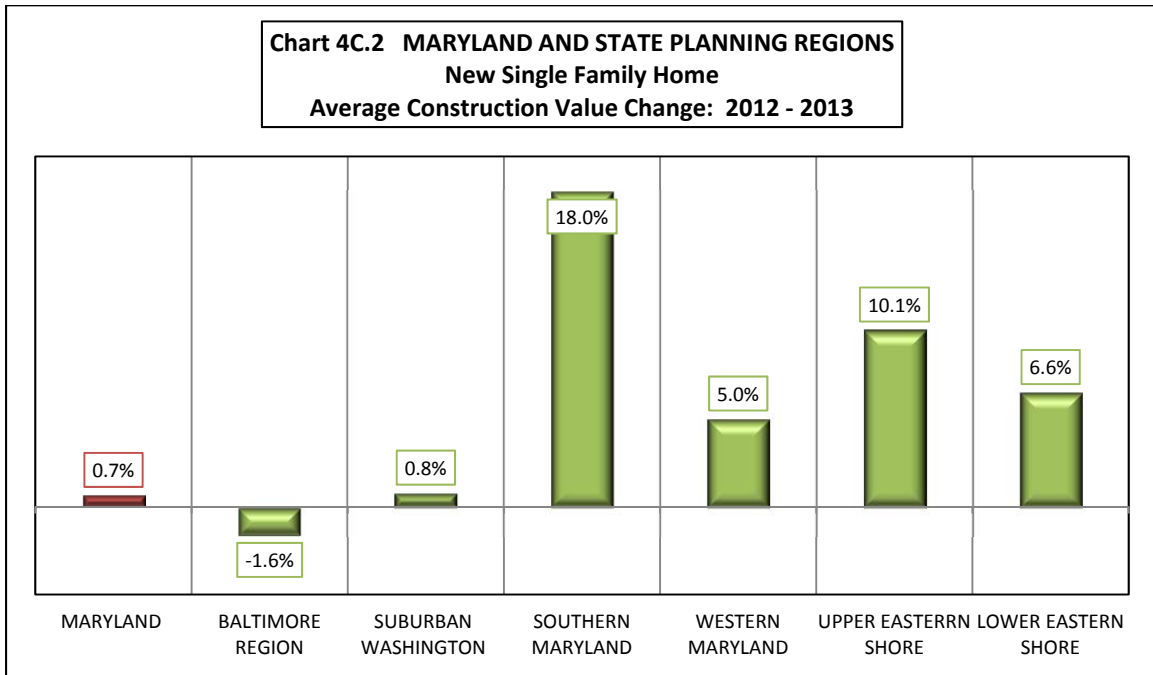
There are 94 new multi-family housing units authorized for construction during 2013. Most (74 new units) are authorized in Washington County, and 68 of these are units in buildings with five or more units. Allegany County authorized the construction of one building containing 20 new housing units. The value of construction for multi-family housing in the region is placed at \$7 million. Garrett County did not report authorizing the construction of any multi-family housing units.

Upper Eastern Shore

Caroline, Cecil, Kent, Queen Anne's and Talbot Counties comprise the Upper Eastern Shore State Planning Region. According to 2013 population estimates from the U. S. Bureau of the Census, the total population is 240,998 persons, accounting for four percent of the State's total population of 5,928,814 persons.

During 2013, Upper Shore permit issuing places authorized 796 new housing units for construction, a decrease of 324 units (30 percent) from 2012, and the highest region wide percentage decrease in new home construction in Maryland. New housing in the Upper Eastern Shore accounts for four percent of the State's total new housing construction. The value of the Region's new residential construction is placed at \$133.5 million.

Permit issuing places on the Upper Eastern Shore Region authorized 669 new single family homes during 2013. This is just over 84 percent of all new housing construction in the five counties. The value of new single family home construction is placed at \$121 million. The region's average construction value for a new single-family home is \$181,525, ten percent below the State average of \$200,724 and ranked last among State planning regions.



The Upper Eastern Shore State Planning Region authorized the construction of 127 multi-family housing units during 2013, a decrease of 343 units or 73 percent from 2012. Cecil County authorized 53 multi-family housing units, while Talbot and Queen Anne’s Counties authorized 40 new units and 34 new units, respectively. Caroline County and Kent County did not report any new multi-family housing units authorized for construction.

The value of Upper Eastern Shore new multi-family housing construction is placed at \$12 million. Nearly all of these new units (123 units or 97 percent), are in buildings containing five or more units.

Lower Eastern Shore

Dorchester, Somerset, Wicomico and Worcester Counties make up the Lower Eastern Shore State Planning Region. The 2013 Census Bureau population estimate for the area is 211,449 persons. The region’s total population accounts for almost four percent of the State’s total population of 5,928,814 persons.

During 2013, permit issuing places in the Lower Eastern Shore Region authorized 898 new housing units for construction. This is an increase of 382 units (74 percent), from 2012 when 516 new housing units were authorized for construction. New residential development in the Lower Eastern Shore accounts for five percent of the new residential construction activity in the State. The value of new home building in the four counties is placed at \$103 million.

Just under one-third of Lower Eastern Shore new housing (297 dwellings) is single family. This is the lowest ratio of single family housing to total housing for any State Planning Region.

New single family housing construction during 2013 is 34 percent higher than in 2012 when 222 homes were built. The average construction value of the Region's a new single family homes is \$202,592, ranking fourth among the State's six planning regions, and almost one percent lower than the statewide average construction cost of \$200,724.

The Lower Eastern Shore Region authorized the construction of 601 new multi-family housing units during 2013, with nearly all (594 units) built in Wicomico County permit issuing places. Five new multi-family housing units are authorized for construction in Worcester County and a duplex (two unit building) is authorized for construction in Somerset County.

The 601 new multi-family housing units permitted in the Lower Eastern Shore during 2013 is an increase of 307 units (104 percent) over 2012. It is also the highest number of new multi-family housing units authorized for construction since 2007, when 373 new multi-family dwellings were built.

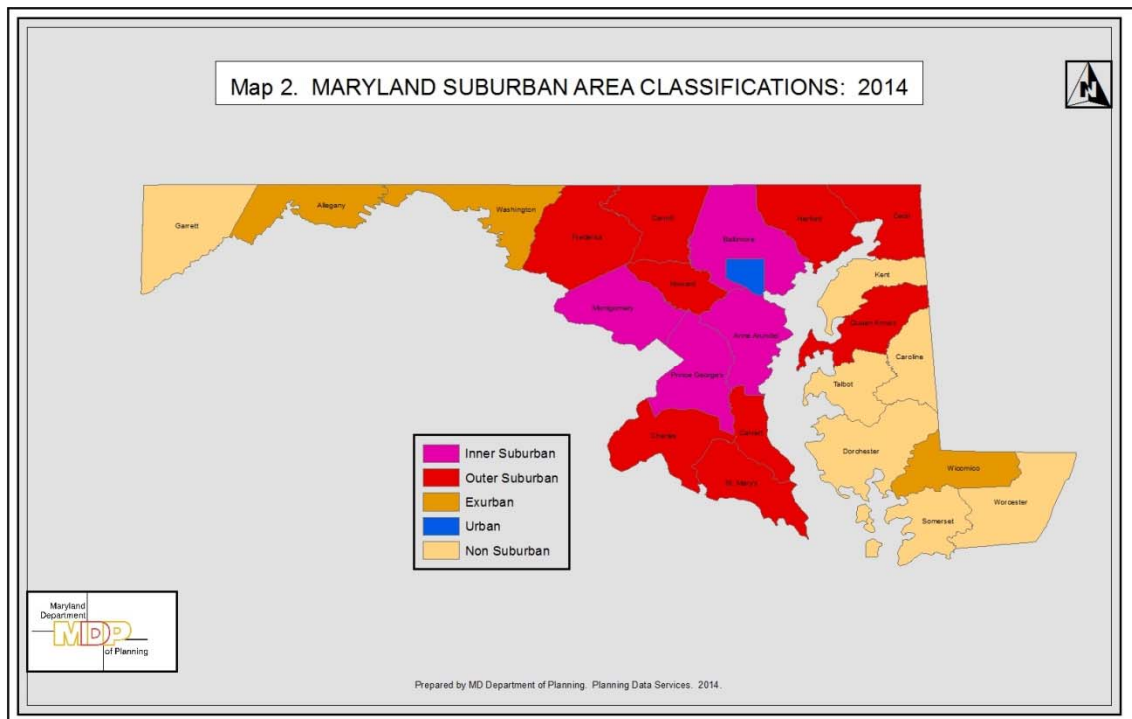
The 2013 value of construction for multi-family dwellings in the Eastern Shore is \$43 million. Nearly all of the new multi-family housing is in buildings containing five or more units (594 units or 99 percent). All of these will be built will be built in Wicomico County.

Residential Development Areas: 2013⁵

Most new residential development in the State is moderate density, single-family housing units built on small plots of land. These new housing units are built in counties within commuting distance of major employment centers. The physical geography of this development is categorized by four features related to urbanization (see Map 2). These features are:

- The jurisdiction's geographic proximity to the population cores of Baltimore City or the District of Columbia;
- The jurisdiction's population size;
- The jurisdiction's weighted population density; and
- The jurisdiction's current population trends.

⁵ See Figure 2 and Charts 5A.1; 5A.2; 5B; 5C.1 and 5C.2.



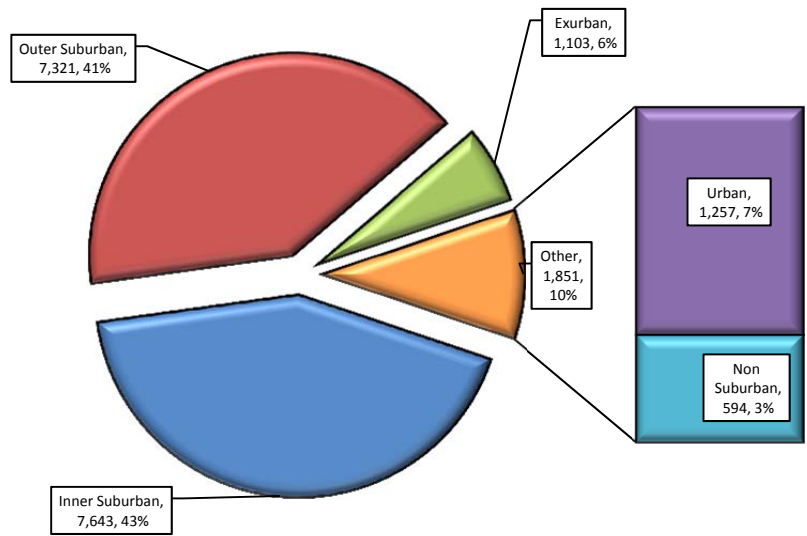
Listed below are the five categories and their component jurisdictions:

1. **Inner Suburban** (Anne Arundel, Baltimore, Montgomery and Prince Georges Counties);
2. **Outer Suburban** (Calvert, Carroll, Cecil, Charles, Frederick, Harford, Howard, Queen Anne’s and St. Mary’s Counties);
3. **Exurban** (Allegany, Washington and Wicomico Counties);
4. **Non – suburban** (Caroline, Dorchester, Garrett, Kent, Somerset, Talbot and Worcester Counties); and
5. **Urban** (Baltimore City).

Over 85 percent of the State’s population (5,075,700 of 5,928,814 persons), lives in the 16 jurisdictions classified suburban, according to 2013 population estimates from the U. S. Bureau of the Census. The balance of the State is classified Urban or Non suburban.

Ninety percent of the State’s new housing, totaling 91 percent of the State’s value of new housing construction, takes place in the Suburbs. During 2013, suburban jurisdictions authorized 16,067 new housing units. These dwellings have an aggregate construction value placed at \$2.6 billion.

Figure 2. MARYLAND SUBURBAN, NON SUBURBAN AND URBAN AREA NEW HOUSING UNITS: 2013

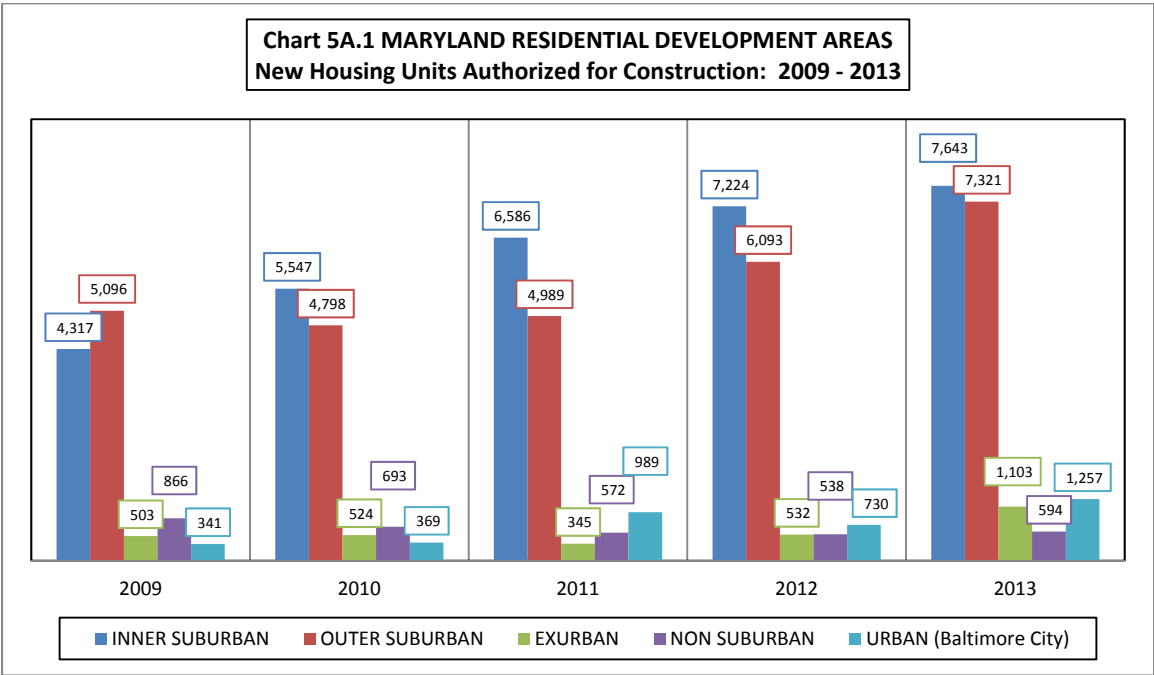


The Suburbs authorized 2,118 more new housing units in 2013 than in 2012, a 15 percent increase. Housing production in Maryland suburban counties has increased every year since 2009 when 9,919 units were authorized for construction.

Ninety-three percent of the State’s new single family homes are built in the Suburbs. During 2013 suburban areas authorized 9,900 new single family homes for construction, with an average cost to build of \$200,923, or slightly more than the statewide average of \$200,724. Single family home construction accounts for 62 percent of all new housing units in Maryland suburban areas.

Maryland’s suburban builders produced 6,167 new multi-family housing units during 2013. This is 85 percent of the State’s new multi-family housing unit inventory, and represents an increase of 804 units over the 5,363 authorized the previous year. The 2013 figure is the highest number of new multi-family housing units authorized for construction since 1998. That year 6,677 multi-family units were authorized in jurisdictions classified as suburban.

The construction value of multi-family housing construction in Suburban jurisdictions is placed at \$568 million. Most of the new multi-family units are garden style or high rise apartments or condominiums (97 percent or 6,167 units). The value of which is placed at \$544 million or 85 percent of the total value of multi-family housing in the suburbs.



Residential Development in Inner Suburban Counties

Anne Arundel, Baltimore, Montgomery and Prince George’s Counties are the State’s Inner Suburban Counties. They share political boundaries with Baltimore City or Washington, DC, and have longstanding employment and transportation ties to the population cores of the two cities.

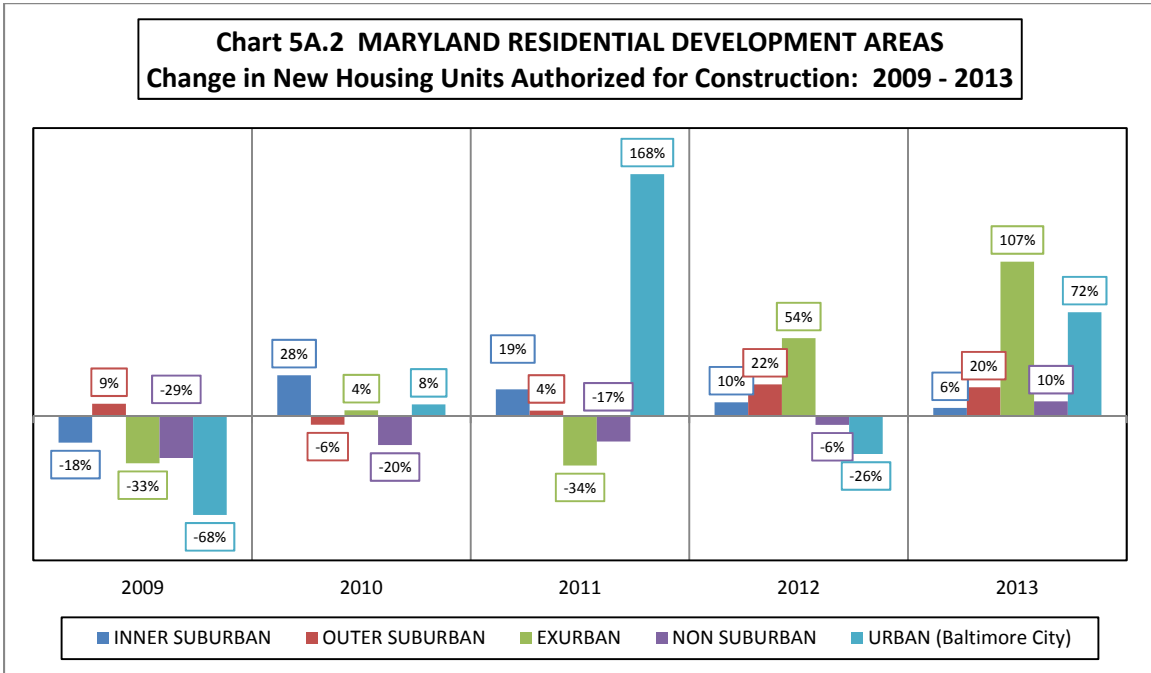
According to the 2012 Three Year American Community Survey the jurisdictions comprising Maryland’s Inner Suburbs contain more than one-half of the State’s population (3,221,348 persons or 55 percent). This is just under two-thirds (64 percent) of the State’s total suburban population.

During 2013, Inner Suburban Counties authorized 7,643 new housing units. This is an increase of 419 housing units (six percent) over what was authorized for construction during 2012, and accounts for 43 percent of the State’s new residential construction.

The value of new residential construction in the Inner Suburban jurisdictions is placed at \$1.2 billion. This is 48 percent of the State’s suburban area development value, and 44 percent of the value of all new residential construction in Maryland.

There are 4,946 new single family homes authorized for construction in Inner Suburban jurisdictions during 2013. Significantly, this is an increase of 1,275 housing units from 2012, a jump of nearly 35 percent. Statewide, 46 percent of all new single family homes are built in these four counties.

The average construction value of an Inner Suburban new single family home is \$191,308. This is two percent less than the average value of construction for a single family home reported in 2012 (\$195,916), and just under five percent below the Maryland average construction value of \$200,724 for a newly built home.



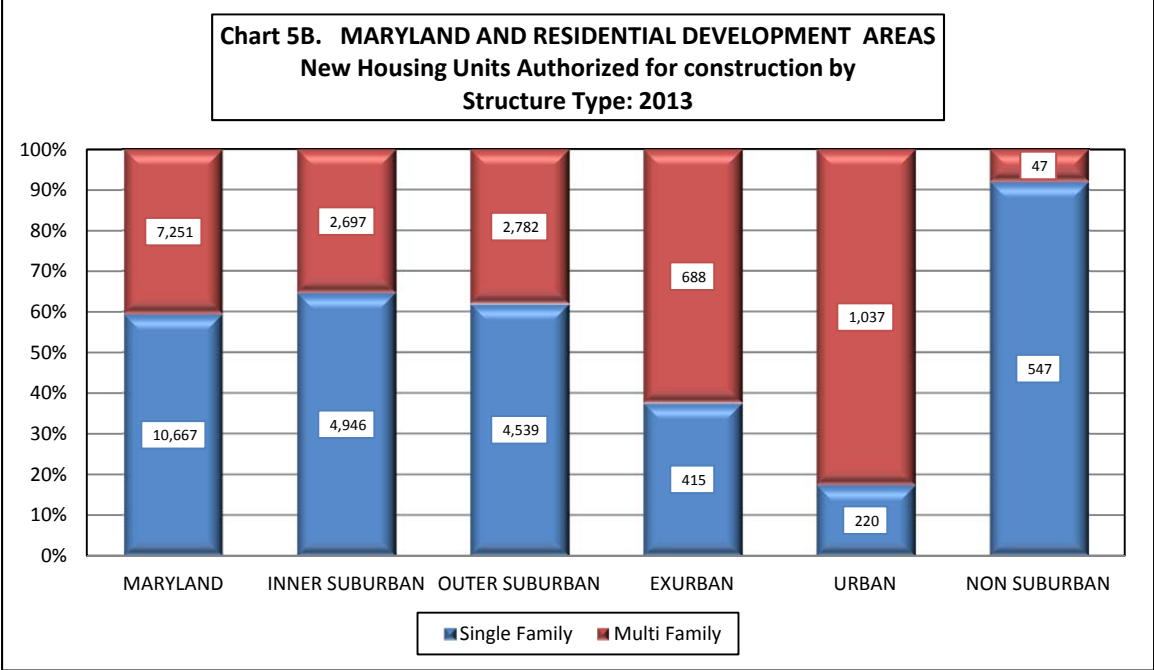
The Inner Suburbs authorized the construction of 2,697 new multi-family housing units during 2013. This represents a drop of 856 dwellings from the 3,553 new multi-family housing units authorized for construction the previous year.

The value of constructing multi-family buildings in the Inner Suburban counties is placed at \$285 million. Nearly 96 percent of the construction value of new multi-family construction comes from producing new apartment or condominium buildings. The construction value for the 2,609 new housing units in buildings containing five or more units in the Inner Suburbs is \$274 million.

Residential Development in Outer Suburban Counties

Calvert, Carroll, Cecil, Charles, Frederick, Harford, Howard, Queen Anne’s and St. Mary’s Counties comprise the Outer Suburban Counties. These are counties that neighbor Inner Suburban Counties and are the fastest growing jurisdictions in the immediate vicinity of the Baltimore City and Washington, DC population cores.

These counties contain 1,466,179 persons according to the 2013 population estimates from the U. S. Bureau of the Census. This is 29 percent of the State’s suburban area population and nearly 25 percent of the State’s total population.



During 2013, Outer Suburban Counties authorized 7,632 new housing units for construction, accounting for 41 percent of the State’s new residential construction during the year. The 2013 total is an increase of 1,128 housing units over the 6,193 new units authorized during 2012, and the highest level of new residential construction activity in the area since 7,949 new housing units were authorized during 2006.

The 2013 value of Outer Suburban housing construction is placed at \$1.2 billion. This is 47 percent of the construction value of all new housing built in the suburbs, and just below 43 percent of the State’s total new housing construction value.

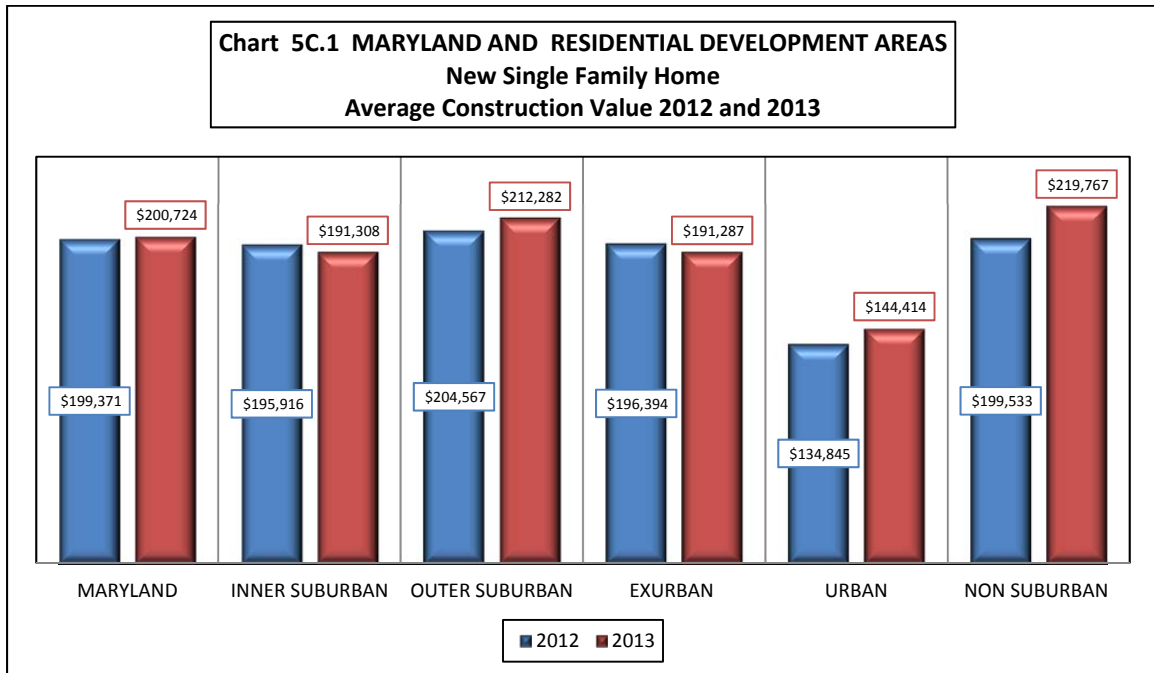
Like the Inner Suburbs, the new housing inventory in the Outer Suburban Counties is predominantly made up of single family dwellings. About six of 10 new housing units (62 percent or 4,539 new units) are single family homes. The number of new single family housing units authorized for construction during 2013 is a decrease of 88 homes over the 4,627 built in 2012.

It is relatively more expensive to build a new home in the Outer Suburban jurisdictions than other suburban areas in the State. The average new home construction cost in these jurisdictions is \$212,282, nearly six percent higher than the State’s 2013 average construction

value of \$200,724 and nearly four percent higher than 2012, when the average cost was \$204,567.

Permit issuing places in the Outer Suburbs authorized building 2,782 new multi-family housing units, accounting for 38 percent of the State’s new multi-family housing unit development activity, and is a 78 percent increase over the 1,566 multi-family housing units authorized during 2012.

The 2013 construction value of new Outer Suburban multi-family residential developments is placed at \$233 million. Nearly all of this value (95 percent) is for the production of apartments and condominiums, as 2,717 of the 2,782 new multi-family units (98 percent) are in buildings containing five or more units.



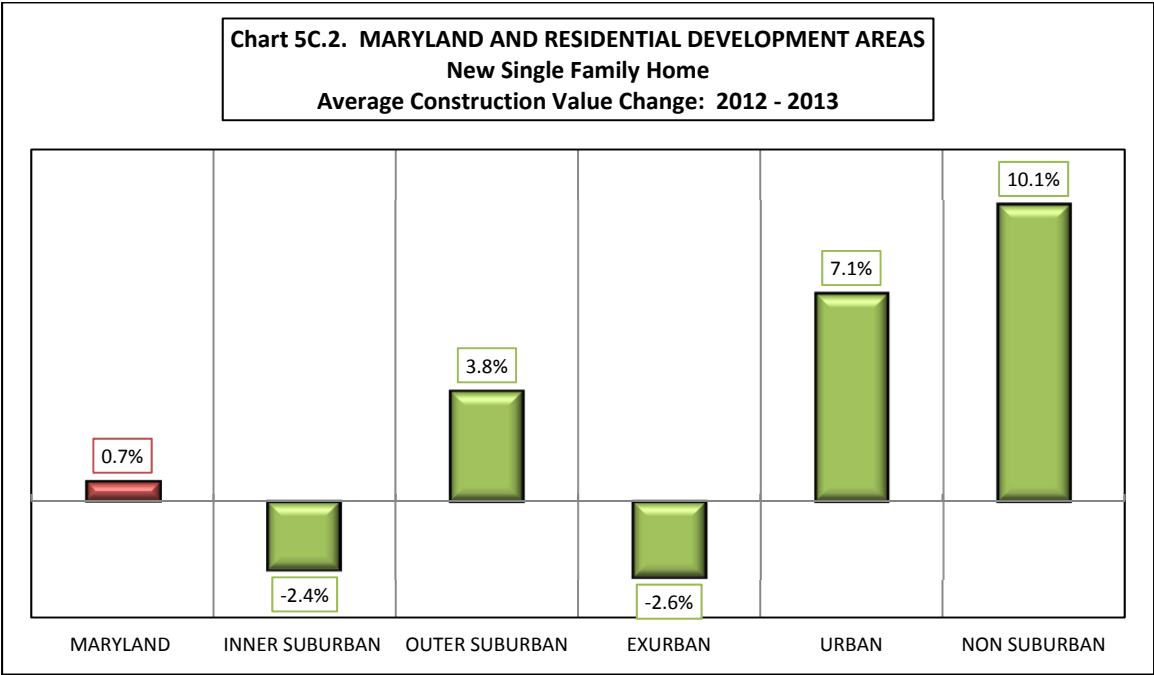
Residential Development in Exurban Counties

Allegany, Washington and Wicomico are classified Exurban Counties. These jurisdictions are distinct Metropolitan Statistical Area central counties, with large expanses of territory that are lightly populated. Workers from these jurisdictions are generally not a significant part of the Baltimore-Washington, DC employment interchange.

The total population in the three jurisdictions is 324,005 persons according to the 2013 population estimates from the U. S. Census Bureau. This is over five percent of the State’s total population, and over six percent of the State’s suburban population.

During 2013, these jurisdictions authorized 1,103 new housing units or six percent of the State’s new residential construction. This is an increase of 571 new units (107 percent) over the 532 new housing units authorized for construction during 2012.

The value of new residential construction in Exurban counties is placed at \$128,767,018. This is almost five percent of the State’s total value of residential new construction in the State, and an increase of 53 percent from the value of new housing construction reported in 2012 (\$84 million).



Allegany, Washington and Wicomico Counties combined to authorize 415 new single family houses in 2013, an increase of 127 units from the 288 single family homes authorized for construction during 2012. Single family housing accounts for 38 percent of all new housing units authorized for construction by Exurban permit issuing places. This is the smallest single family unit percentage of any of the State’s suburban areas.

The 2013 average construction value of new single family homes in Exurban counties is \$191,287. This is five percent below the average cost of a new single family home in Maryland, but equivalent to the construction value of new single family homes in the Inner suburban jurisdictions. The 2013 average construction value is three percent lower than the \$196,394 average new home construction value the previous year.

Unlike the Inner and Outer Suburban Counties, the Exurban counties authorized more multi-family housing units than single family housing units. The permit issuing places in Exurban jurisdictions authorized 688 new multi-family housing units for construction (682 of which are in buildings containing five or more units). Total new multi-family housing in 2013 is a substantial