

# Mid-Year 2021 Lot Price Survey – Key Findings

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CDS Community Development Strategies  
Lot Pricing Update Presentation

September 28, 2021

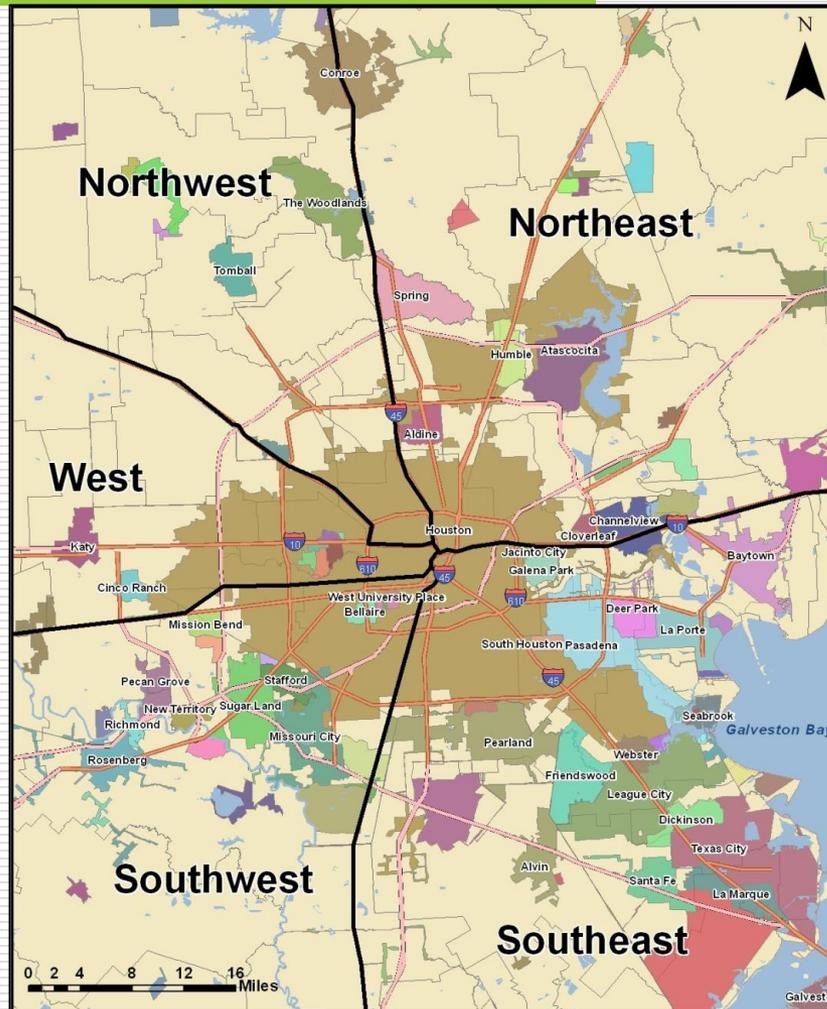


# In Memoriam

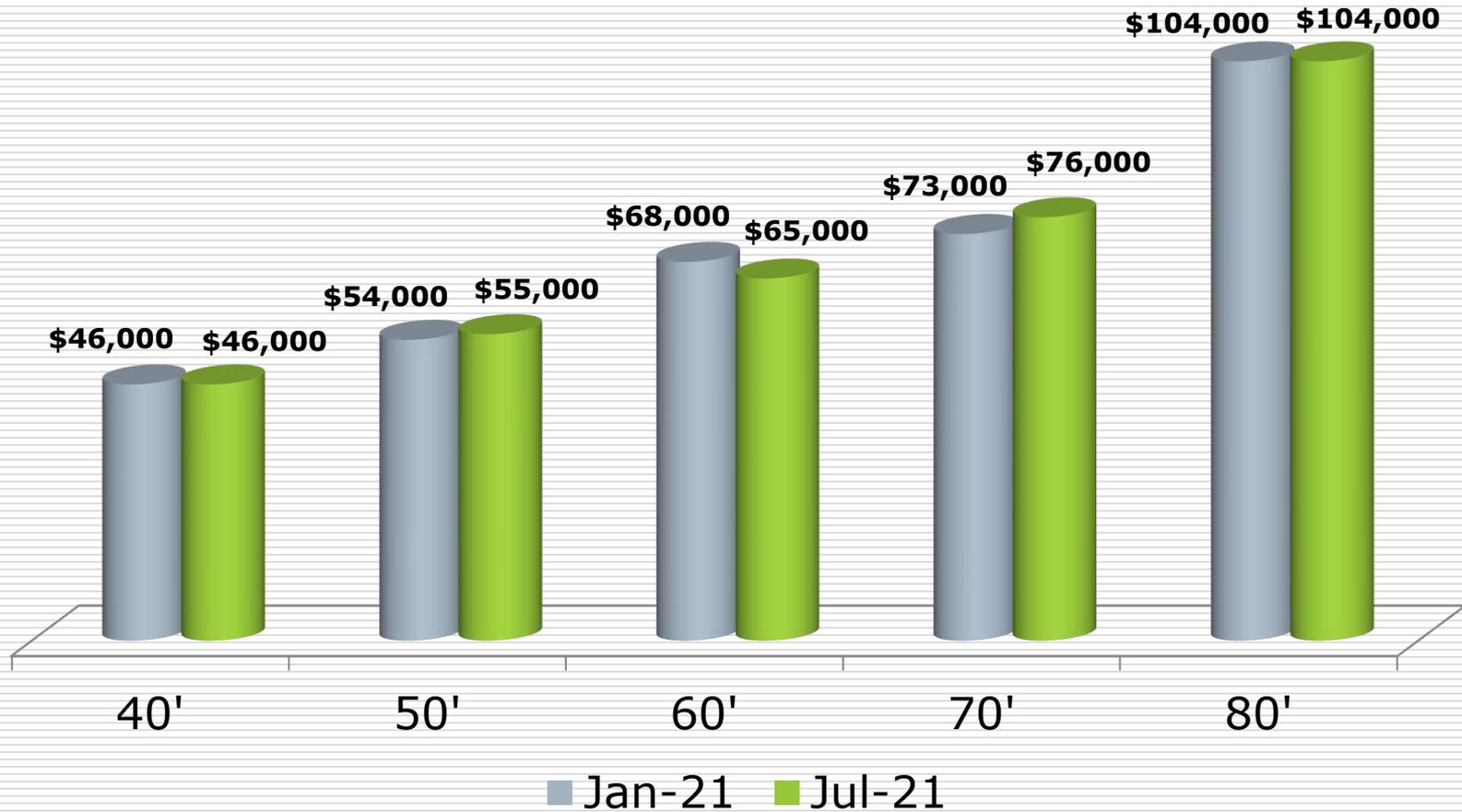


Kent Dussair, 1939 - 2021

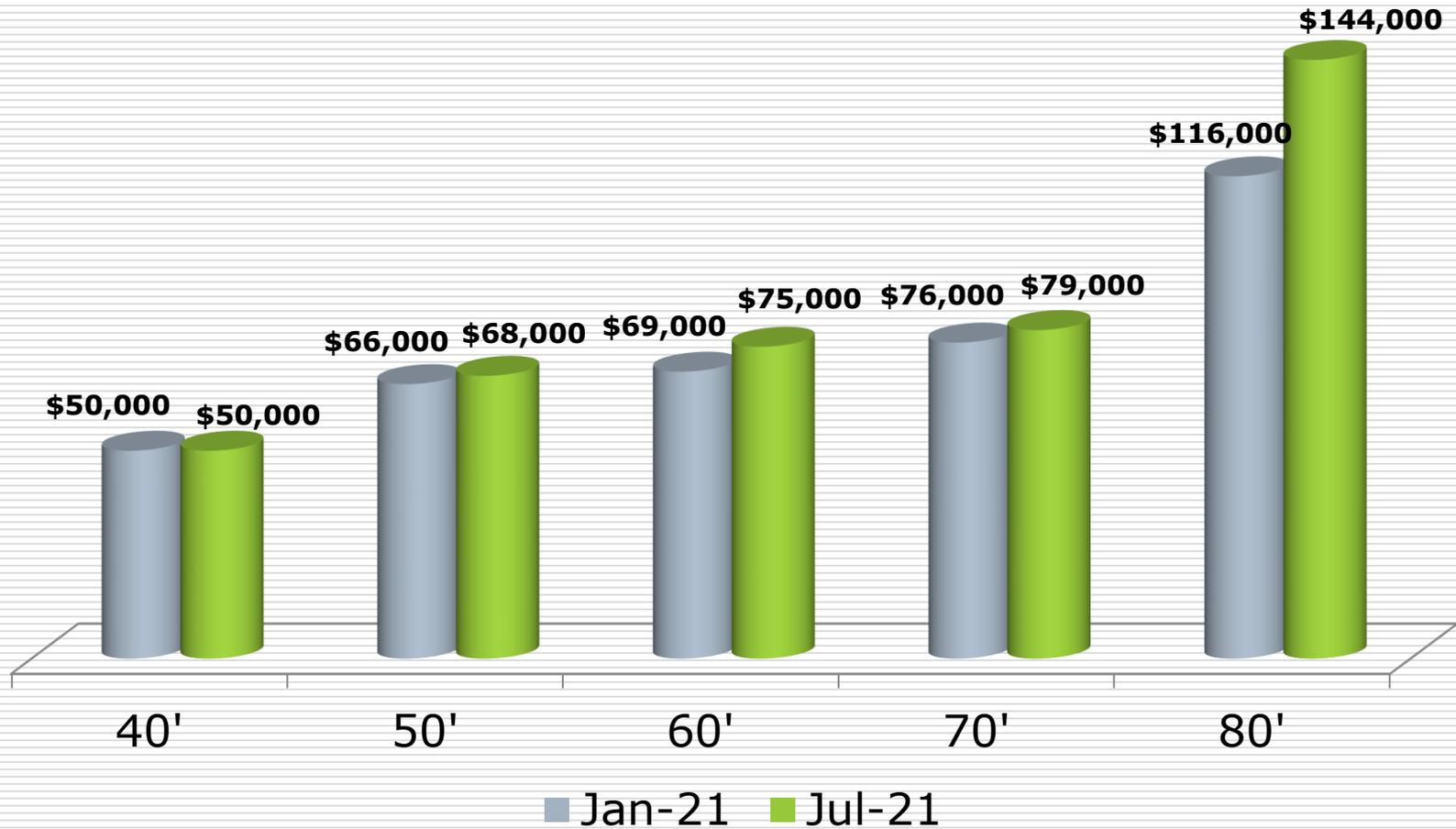
# Sector Map



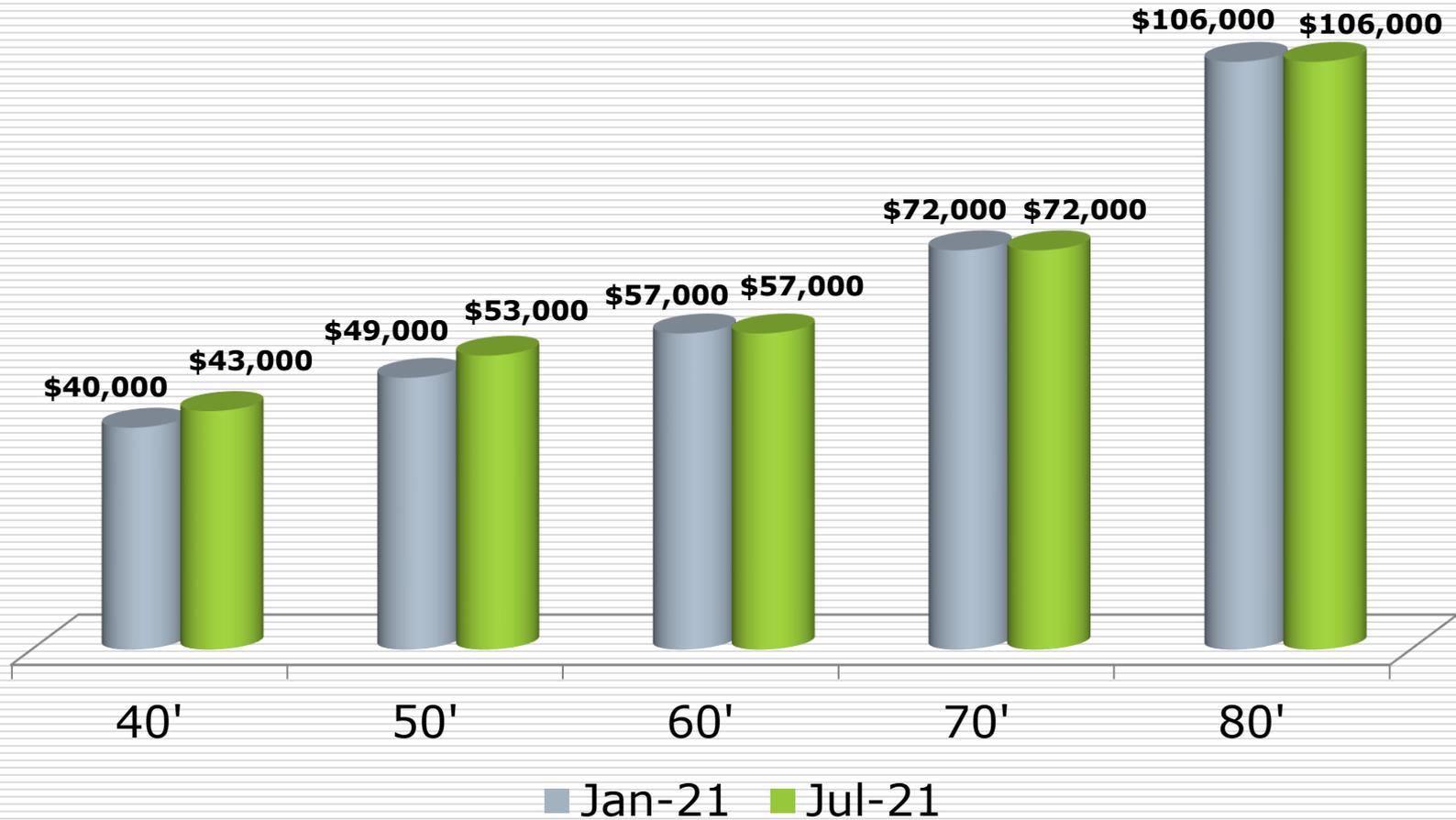
# Northeast Sector Lot Prices



# Northwest Sector Lot Prices



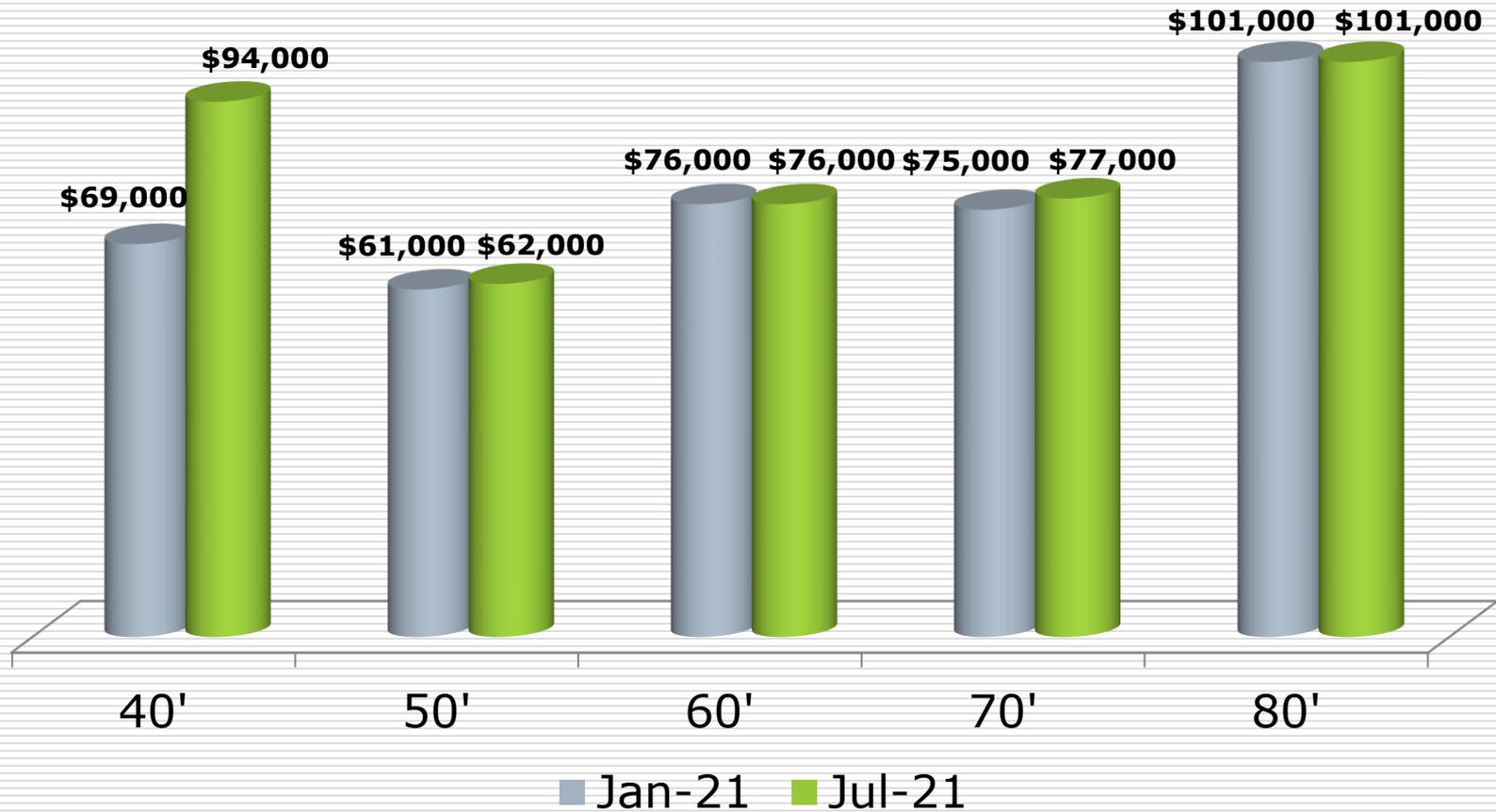
# Southeast Sector Lot Prices



# Southwest Sector Lot Prices



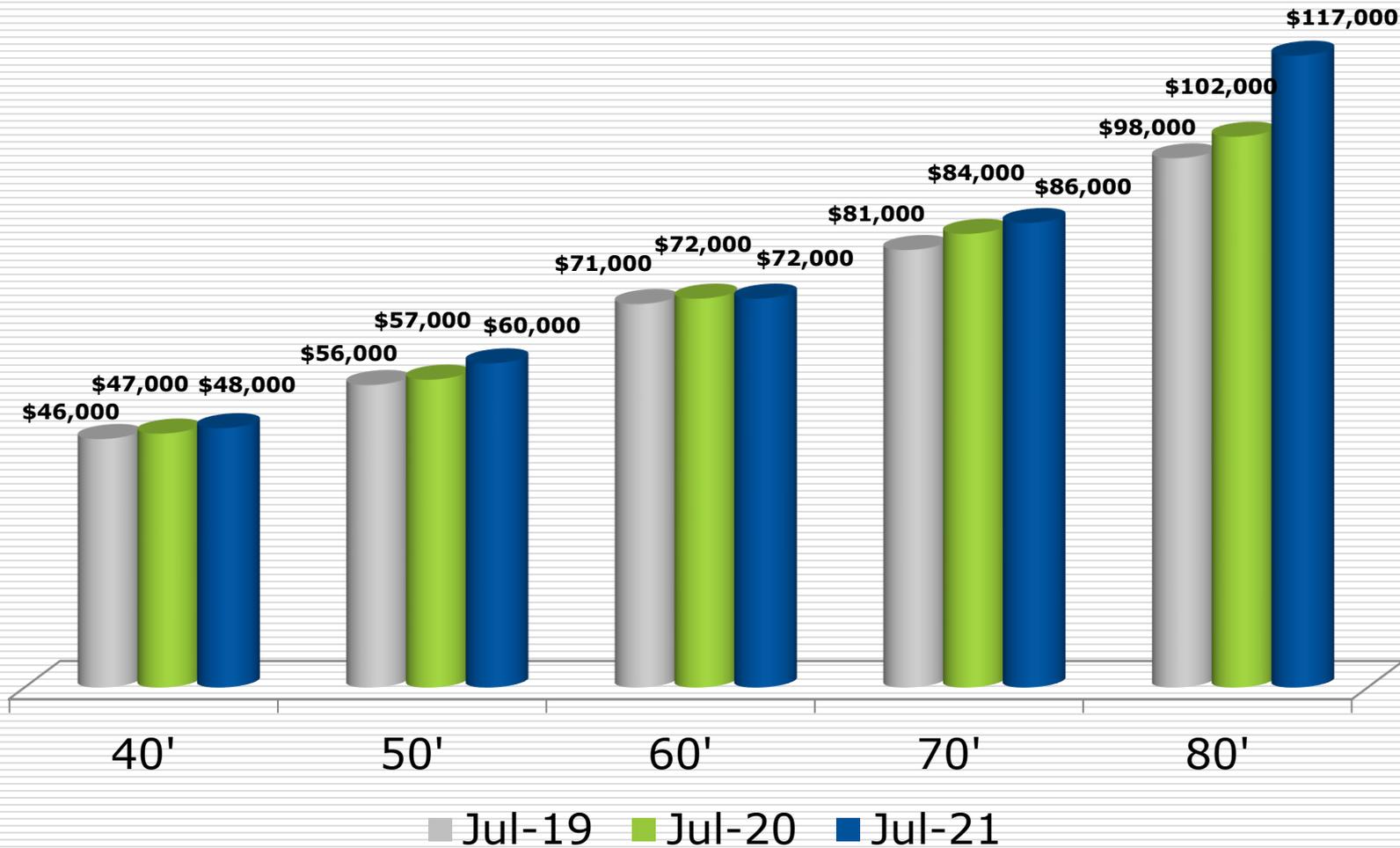
# West Sector Lot Prices



# Lot Prices by Size – Conventional vs. MPC



# Lot Price Changes for MPC



# Lot Price Changes for Conventional Subdivisions



# Observations

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- Impact of new lot development
    - All sectors saw a significant share of new lots added, with just over half of new lots in the survey being located in either the Northeast or Northwest sectors
  
  - Lot pricing facts and trends over the past year
    - MPC lots are 12.8% above conventional on average, largest differences are in 60'-75' lots and 45' lots
    - Largest price increases for conventional subdivisions have been in 45' and 80' lot sizes
    - MPCs saw their largest price increases in 70', 80' and 90' lots
    - Prices have increased in most MPC lot sizes over the past year, while conventional subdivisions saw their prices hold steady
    - 40' lots continue to outperform 45' lots on price per front foot basis in both conventional and MPC subdivisions
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# Observations

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- Differences by sector
    - The West sector saw far and away the strongest average price increases in the past six months
    - The Northwest sector has the highest prices in 6 of the 10 major lots sizes and the highest average prices overall
    - The West and Southwest sectors are close behind with the Southeast and Northeast sectors continuing to have the lowest lot prices on average
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# The Lot Price Survey Site



Microsoft Power BI

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### Subdivisions

118 Subdivisions Selected

Subdivision Name	Sector
Albury Trails Estates	Northwest
Alexander Estates	Northwest
Alana	Southwest
Arcadia Court	West
Artavia	Northeast
Augusta Pines Creek Ridge	Northwest
Avalon at Spring Green	West
Avalon Terrace	Southeast
Balmoral	Northeast
Bay Colony West	Southeast
Bayou Oaks	Southeast
Bonbrook Plantation	Southwest
Bradbury Forest	Northeast
Breckenridge Forest	Northeast
Cambridge Heights	Southwest
Cane Island	West
Chapel Heights	Northwest
Cinco Ranch	West
City Park	Southeast
Country Colony	Northeast
Creekside Ranch	Southwest
Cross Creek Ranch	West
Cypress Creek Lakes	West
Delany Cove	Southeast
Eagle Springs	Northeast
Edgewater	Southeast
Elyson	West
Enclave at Northpointe	Northwest
Estates of Longwood	Northwest
Estteridge	Northeast
Fall Creek	Northeast
Falls at Dry Creek	Northwest
Fieldstone	Southeast
Friendswood Trails	Southeast
Fulshear Lakes	Southwest
Glenn Park	Northwest

118 Subdivisions Selected

**Sectors**

- Northeast
- Northwest
- Southeast
- Southwest
- West

**Counties**

- (Blank)
- Brazoria
- Chambers
- Fort Bend
- Galveston
- Harris
- Montgomery
- Waller

**School Districts**

- (Blank)
- Aldine ISD
- Alief ISD
- Alvin ISD
- Alvin ISD (old)
- Barbers Hill ISD

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# CDS is not just the LPS

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- ❑ Market studies addressing MUD Creations and Bond Applications
- ❑ Market planning studies for acquisition and development planning
- ❑ Third-party feasibility studies for lenders, investors and financial partners
- ❑ Market studies for retail, multifamily, office, industrial and student housing
- ❑ Population and demographic trend analysis
- ❑ Market demand assessments for various lot and housing products





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