

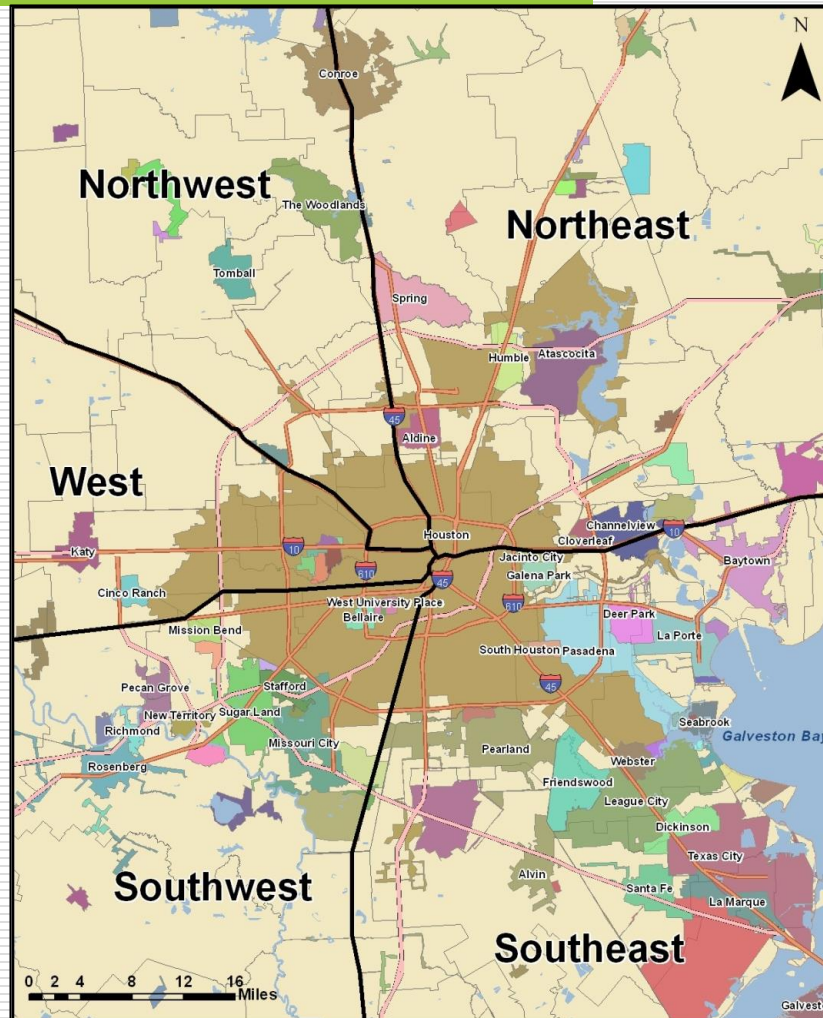
Mid-Year 2022 Lot Price Survey – Key Findings

CDS Community Development Strategies
Lot Pricing Update Presentation

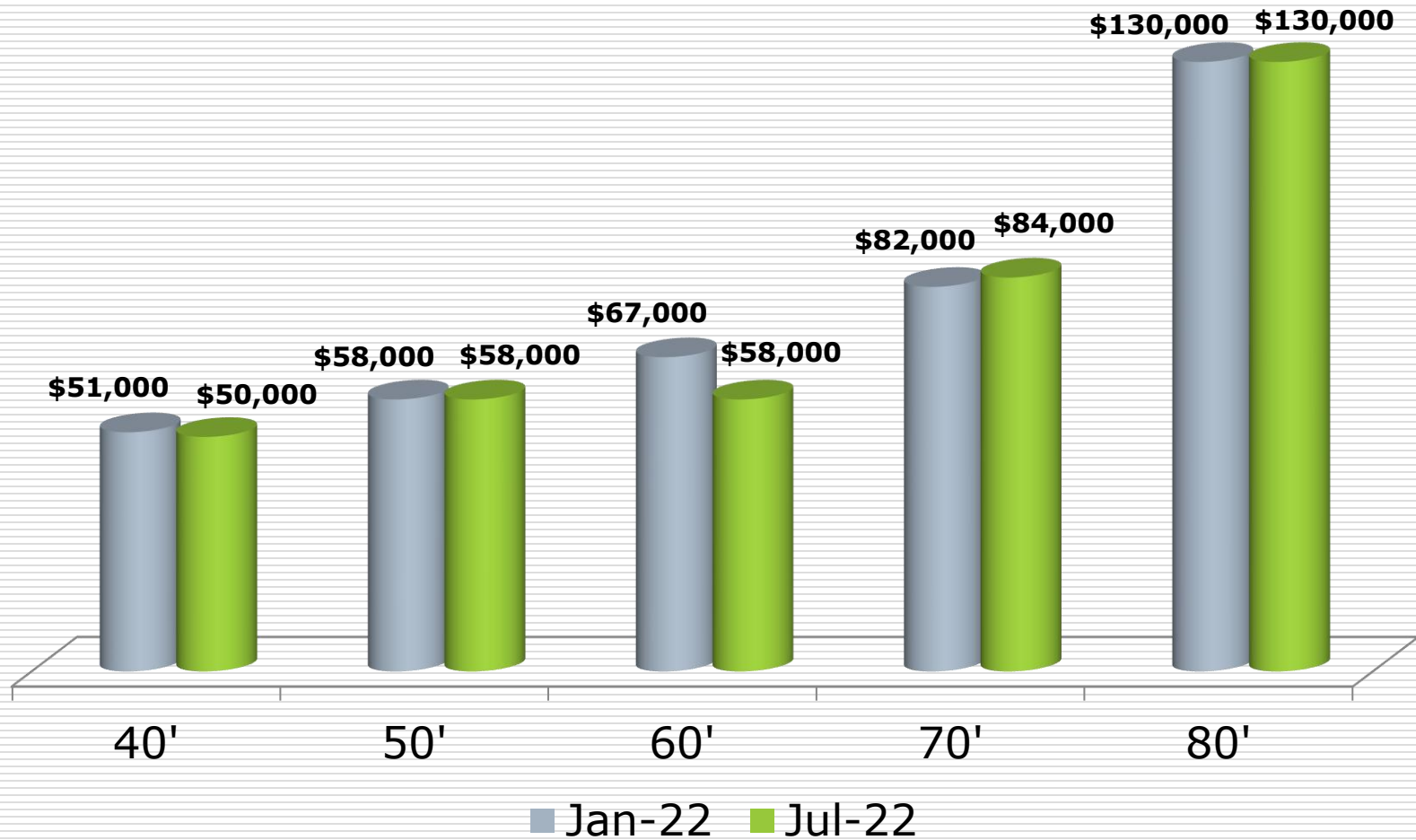
September 27, 2022



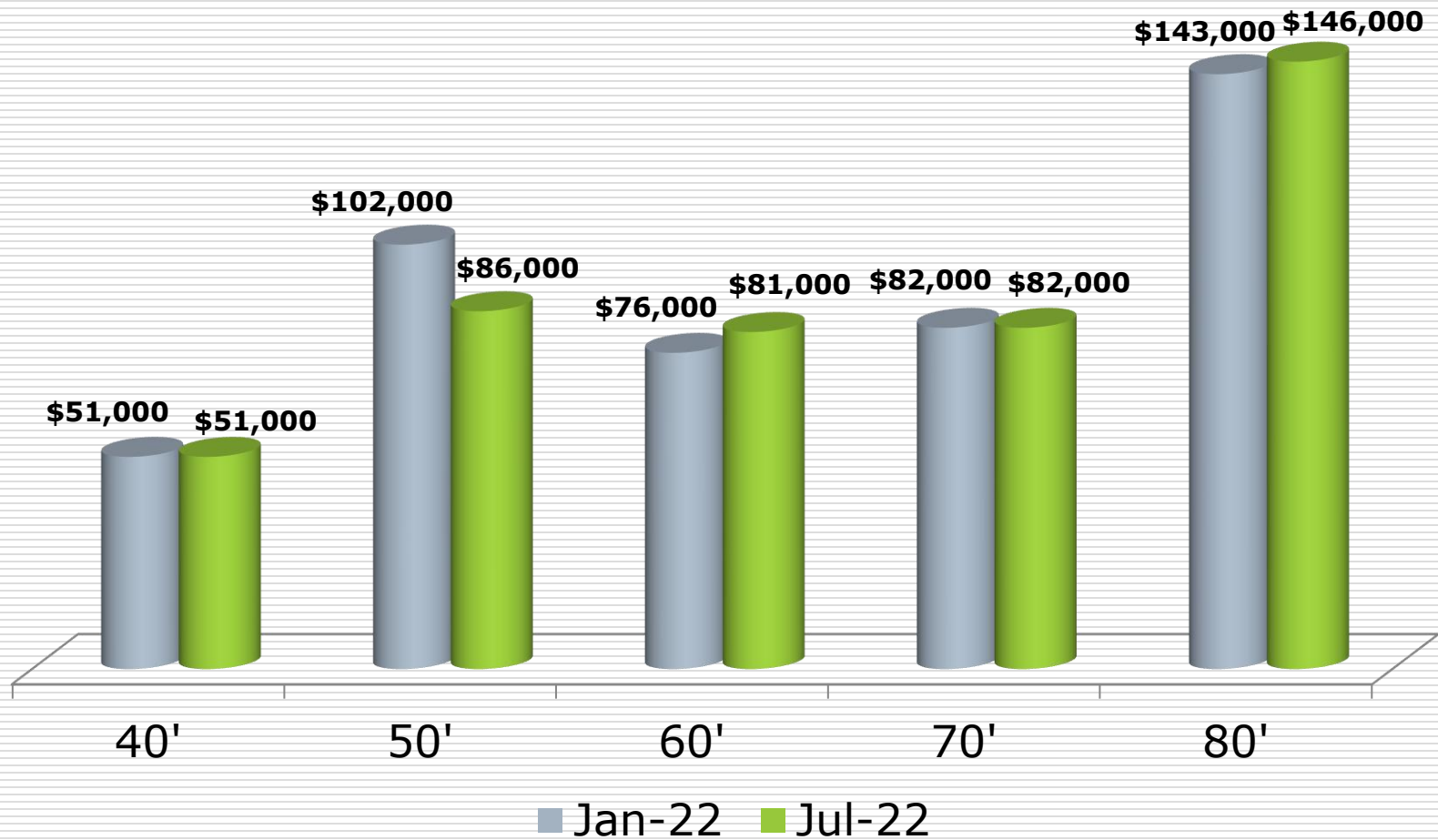
Sector Map



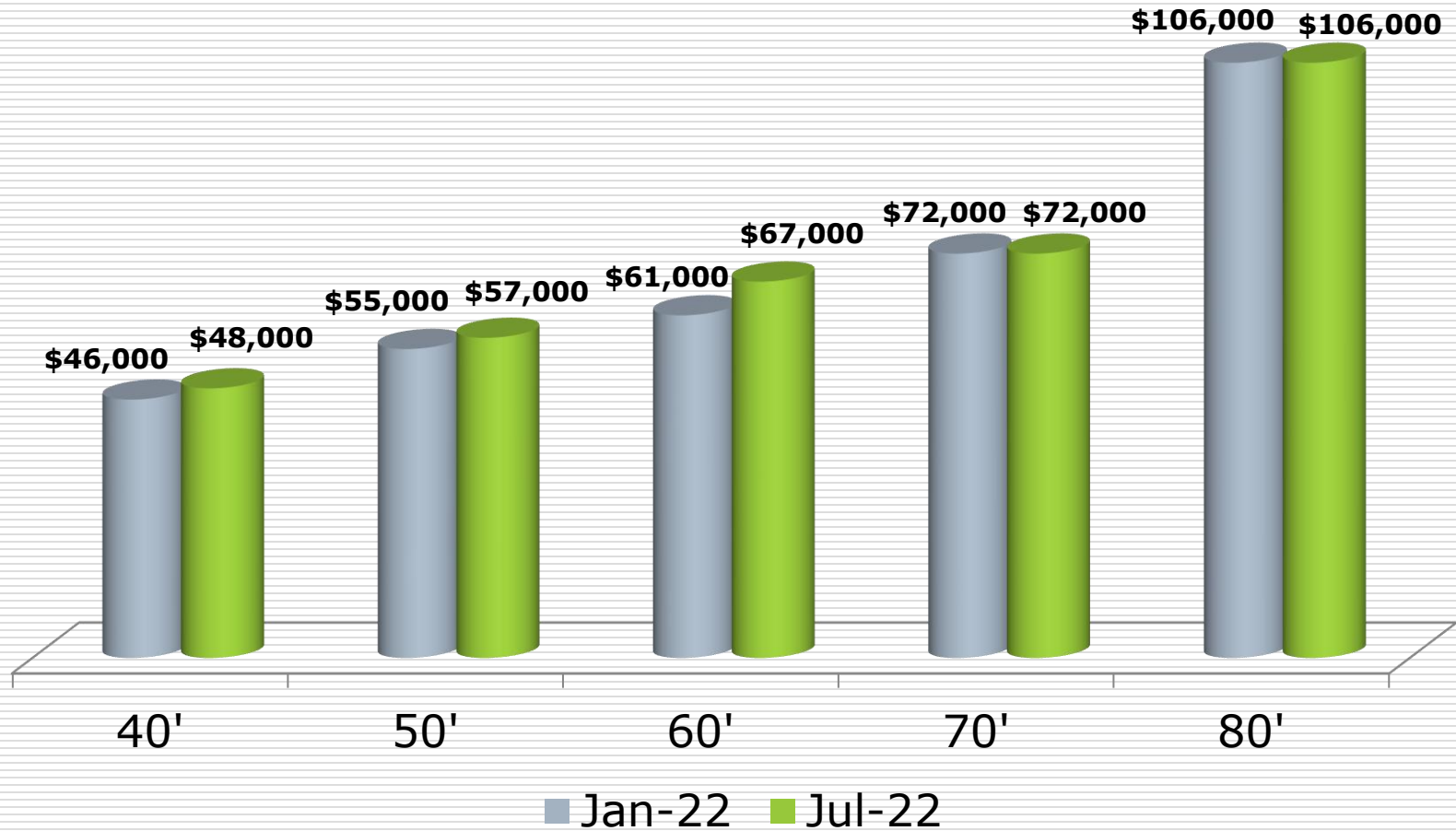
Northeast Sector Lot Prices



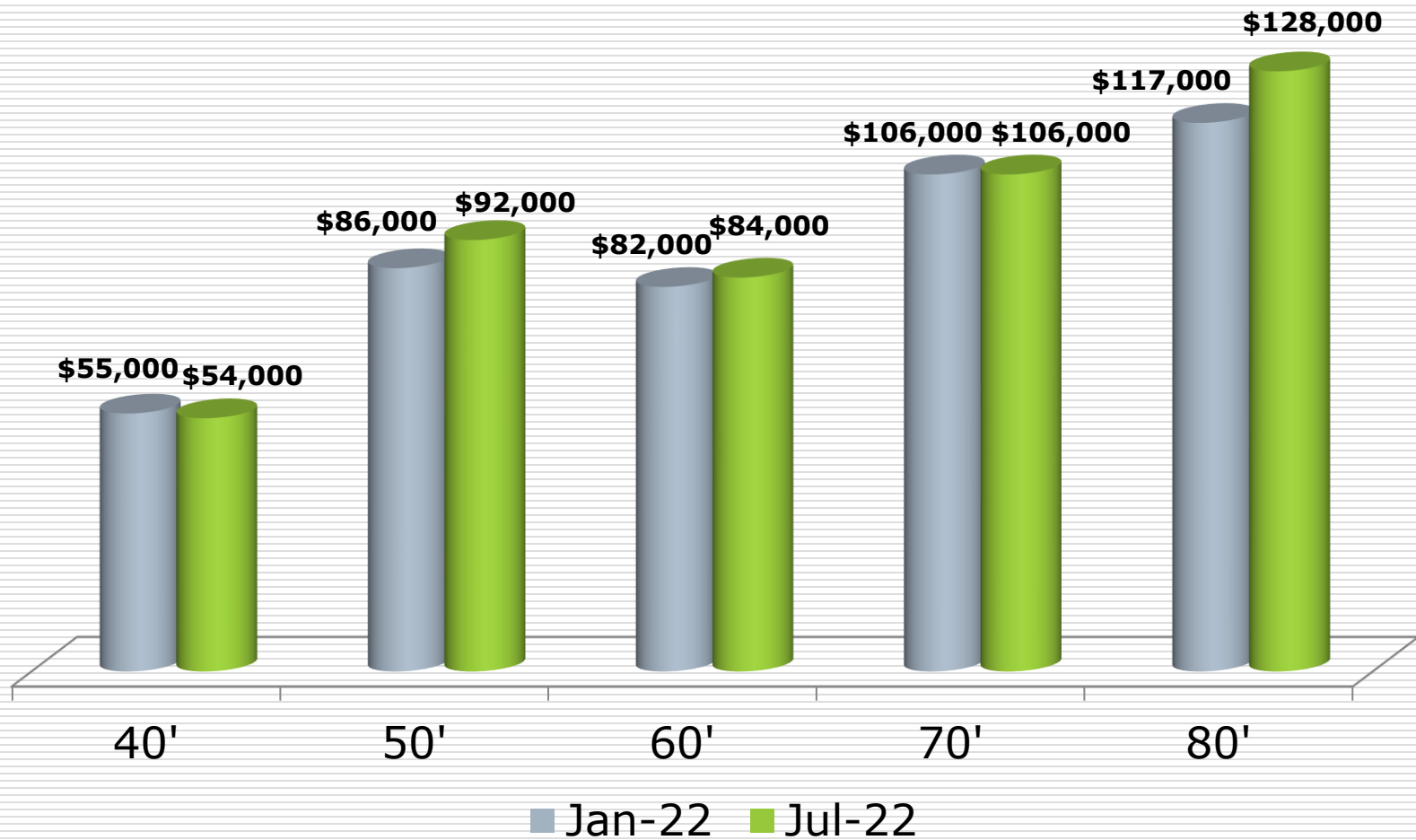
Northwest Sector Lot Prices



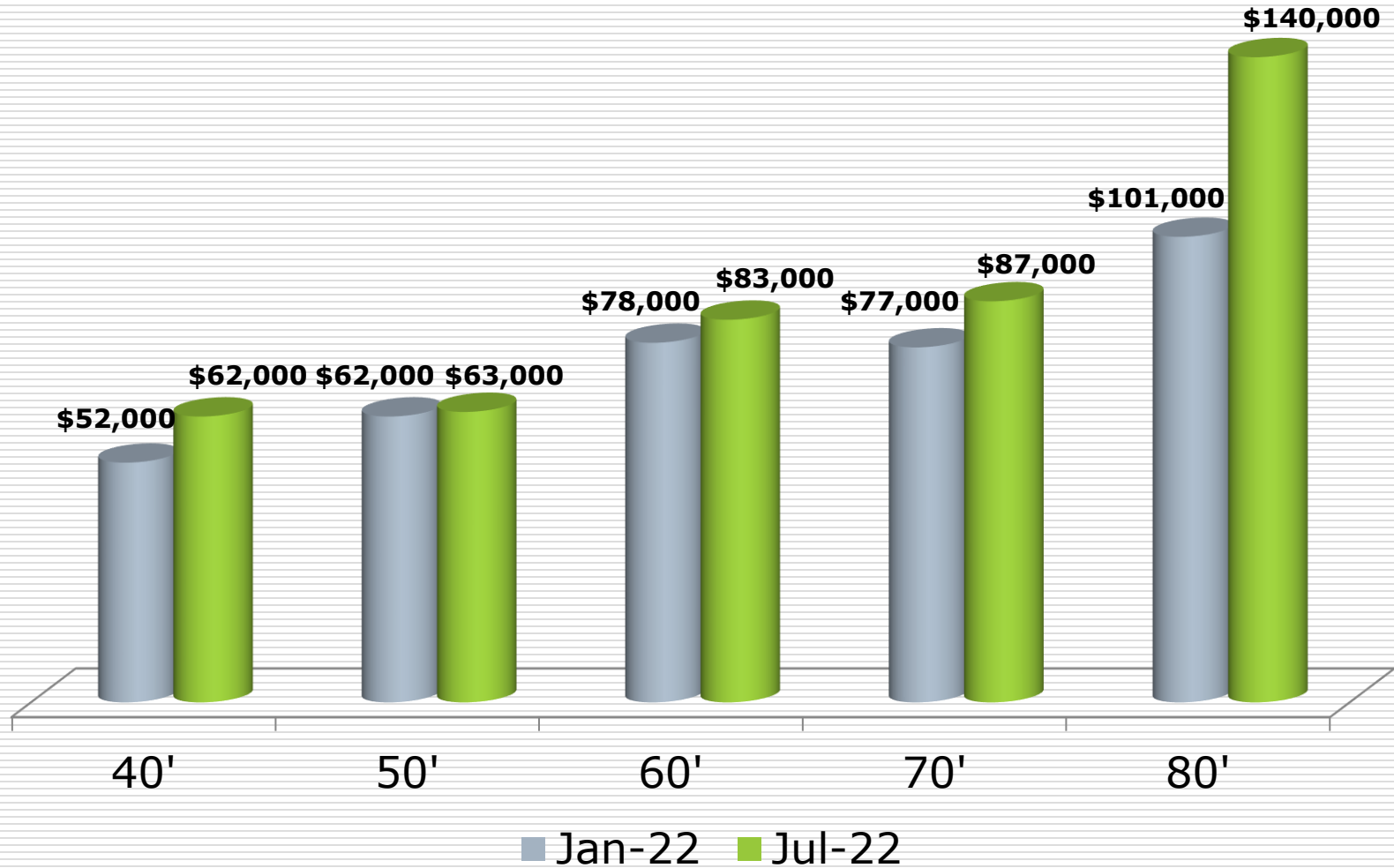
Southeast Sector Lot Prices



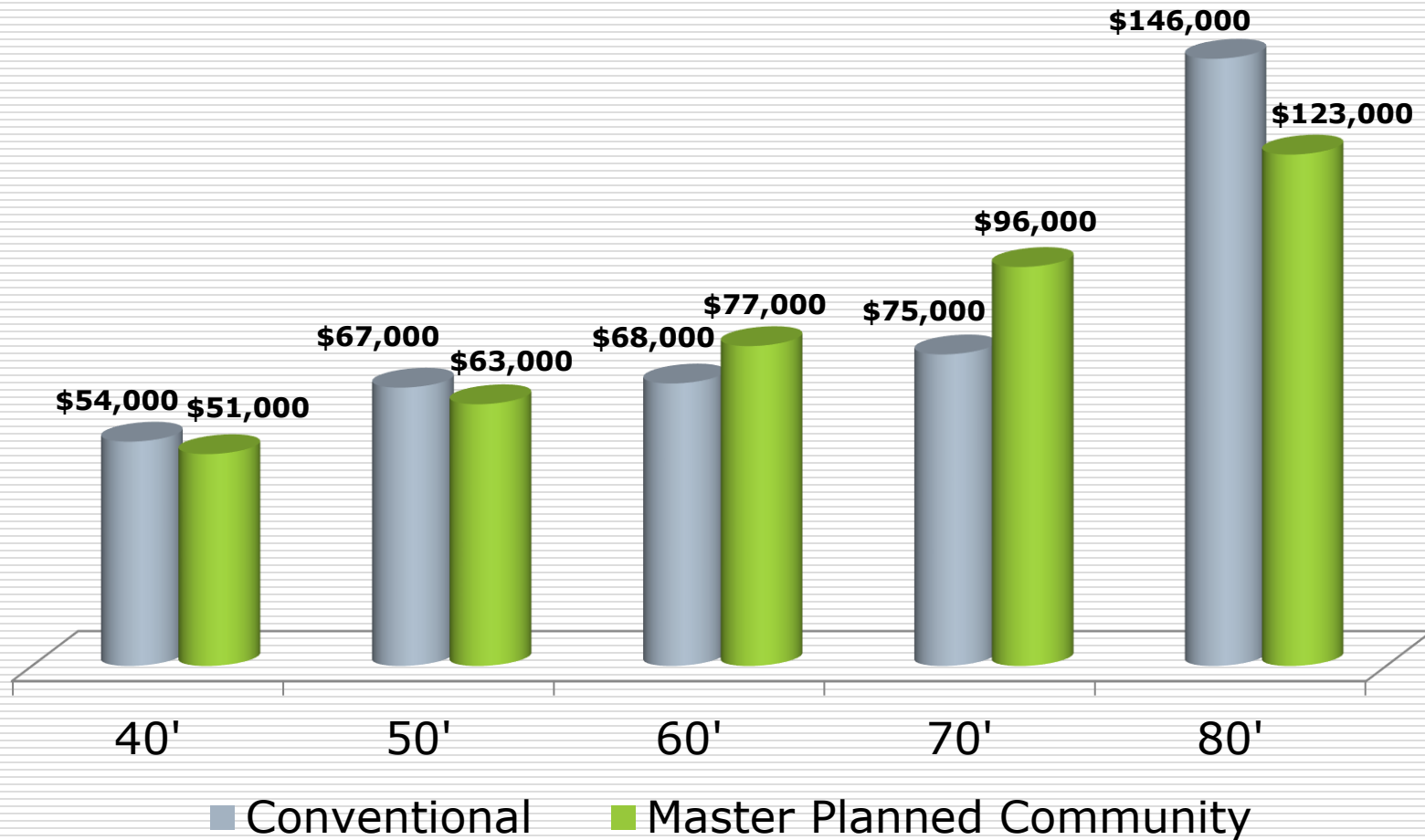
Southwest Sector Lot Prices



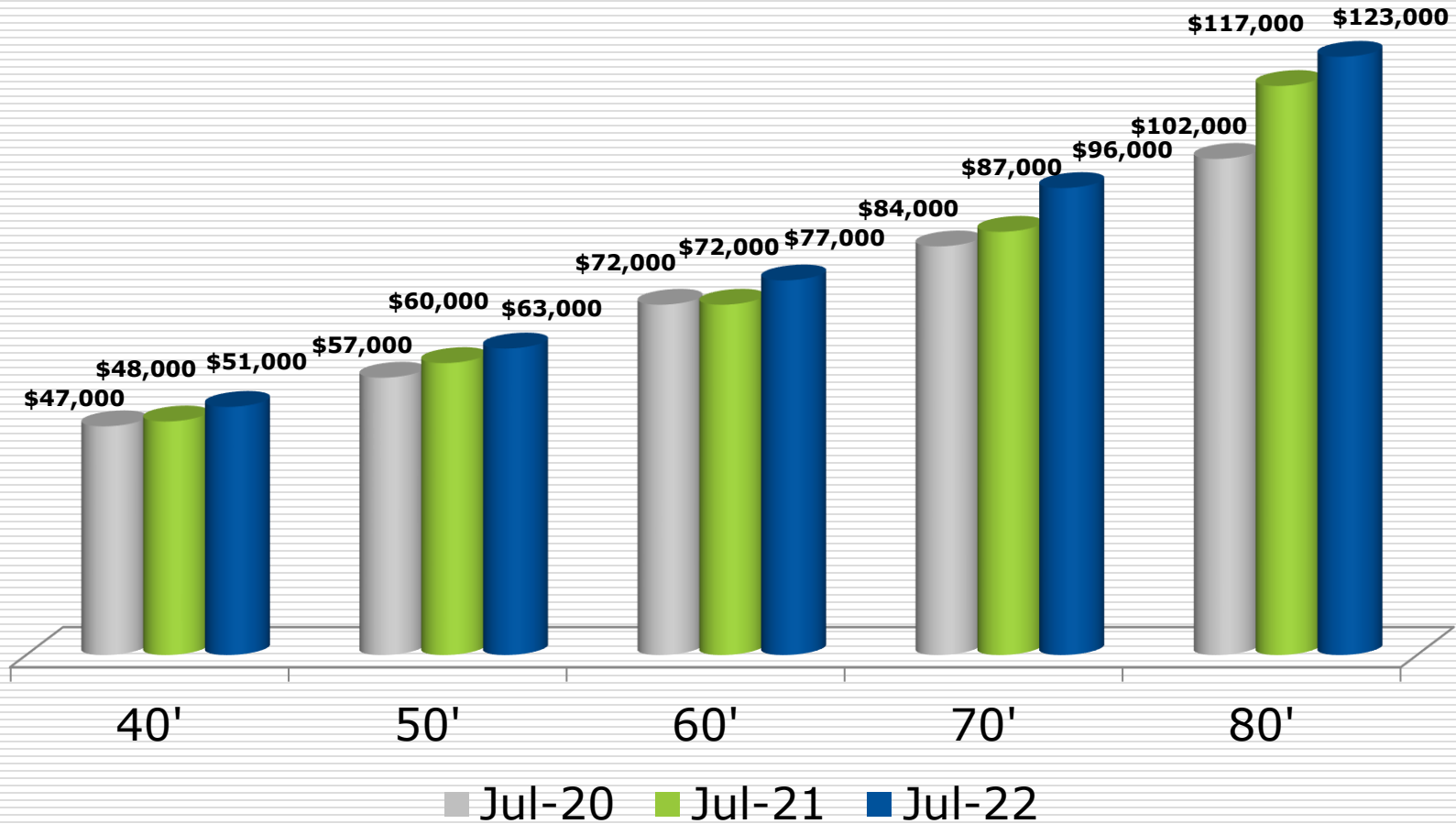
West Sector Lot Prices



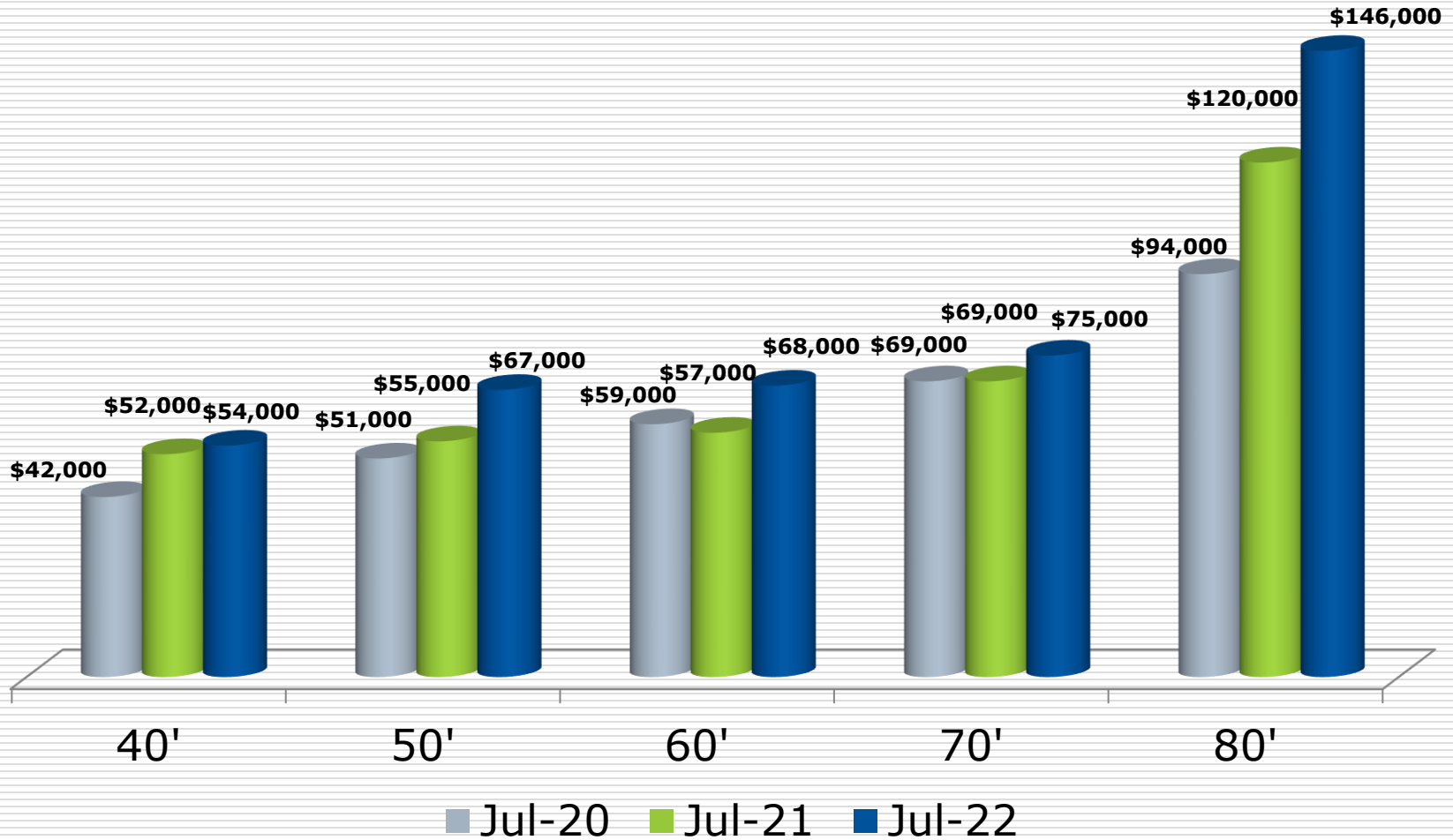
Lot Prices by Size – Conventional vs. MPC



Lot Price Changes for MPC



Lot Price Changes for Conventional Subdivisions



Observations

- Impact of new lot development
 - Increased share of new lots in the survey are in West and Northwest with a decreased share of new lots developed in the Northeast, Southeast, and Southwest sectors

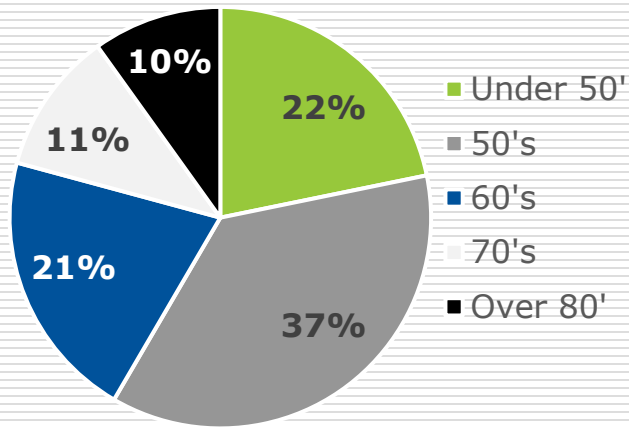
 - Lot pricing facts and trends over the past year
 - MPC lots are 11.3% above conventional on average, largest differences are in 65'-75' lots and 45' lots
 - Largest price increases for conventional subdivisions have been in 60' and 80' lot sizes
 - MPCs saw their largest price increases in 75' lots
 - Prices have increased in most lot sizes over the past year, the largest increases in conventional subdivisions are in large lot sizes, while MPCs saw larger increases across the board
 - 40' lots outperformed 45' lots on price per front foot basis in conventional subdivisions
-

Observations

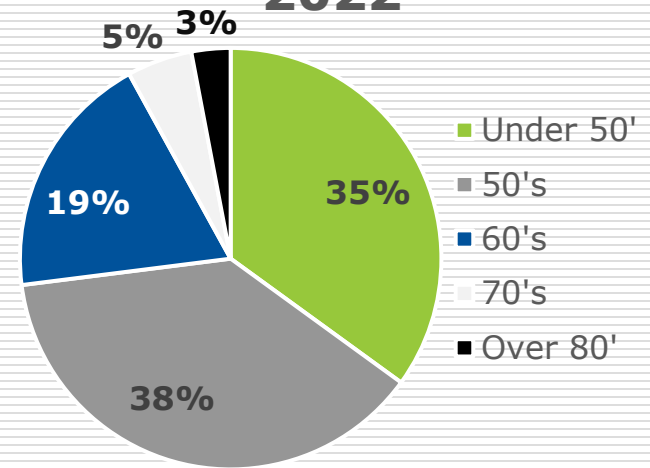
- Differences by sector
 - The highest lot prices are now seen in the Southwest sector, with the Northwest and West sectors just behind
 - The Southeast, Southwest, and West sectors saw the strongest price increases in the past six months
 - The West sector's long-held price premium began narrowing in 2015 and disappeared in 2019. The prices in the Southwest and Northwest are now slightly higher than in the West.
 - The strongest increases across all sectors are seen in the medium lot sizes, between 55'-75'.
-

Changing Lot Size Mix

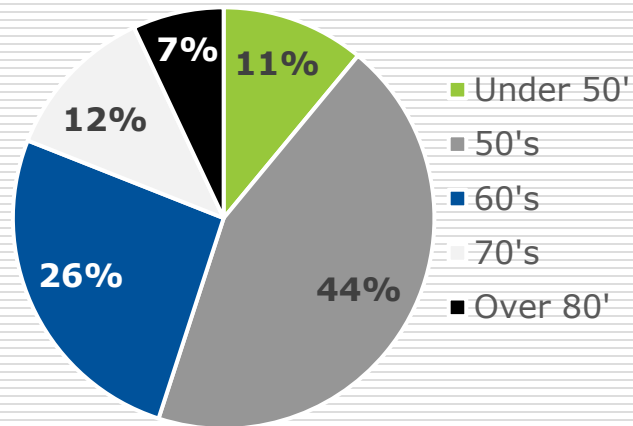
2012



2022



2017



The Lot Price Survey Website



Microsoft Power BI

1 of 8

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CDS COMMUNITY DEVELOPMENT STRATEGIES

HOME WHO WE ARE SERVICES NEWSWORTHY LOT PRICE SURVEY CONTACT

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
Creskide 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

CDS is not just the LPS

- ❑ 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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