An Alternative Development Scenario for San Diego County

A Report Prepared on Behalf of the Cleveland National Forest Foundation

Prepared by Larry Orman, Executive Director

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Contents

Summary

In order to protect natural systems and rural landscapes, as well as to ensure urban growth occurs primarily in incorporated areas, it is reasonable for the County of San Diego to consider a growth alternative in its General Plan process that reduces by approximately two-thirds the number of housing units current proposed for unincorporated areas and to re-allocate these units to cities within the County. Such a scenario would, by 2030, still leave substantial residential capacity in cities for future growth needs.

1. INTRODUCTION

The purpose of this project is to provide an assessment of whether it is reasonable to shift significant anticipated growth from unincorporated areas of San Diego County into existing cities in the County, in order to lessen pressure on important natural resources, reduce sprawl and foster compact and more sustainable development. This memorandum outlines the findings of this assessment.

The San Diego County proposed General Plan Update has been used, in consultation with CNFF, to determine what growth might be redirected. Data from the San Diego Association of Governments (SANDAG), has been used to assess the feasibility of allocating that increment of growth to existing cities.

GreenInfo Network is a non-profit organization founded in 1996 to support other public interest organizations and public agencies with computer mapping and related information technology. Using Geographic Information Systems (GIS) software and other tools, GreenInfo Network aides approximately 80 groups a year on a wide range of projects, covering environmental protection, land use, social justice, public health and other matters. With its twelve professional staff, GreenInfo Network has assisted over 300 organizations and agencies since its founding.

GreenInfo Network has background in the issues described in this report, including extensive work on a recent infill model for the San Francisco Bay Area and the expertise of its Executive Director, Larry Orman, who has considerable experience in local and regional land use planning.

2. KEY INFORMATION ELEMENTS

San Diego County is fortunate to have a large amount of very competent geographic and demographic data to support land use planning. In particular, SANDAG , uses extremely robust GIS data and growth modeling that allow very effective review and assessment of the type conducted for this project. Their data and other sources used include the following:

1. San Diego County Draft General Plan Update: The draft plan provided the numbers of people and dwelling units proposed for each unincorporated community, or planning area, in the County. Cleveland National Forest Foundation (CNFF) has determined that approximately 66 percent of this growth can be redirected to cities from these unincorporated areas, ensuring that substantial gains would be possible in resource protection, sprawl avoidance and urban sustainability. See Appendix 1, CNFF memorandum dated May 27, 2010.

2. SANDAG Population projections: SANDAG maintains population projections for the entire County. Its most recently adopted version is its 2050 series (February 2010), which was used in determining future projected growth in incorporated areas. An explicit reference to the primary data table used is noted in the Appendix title page at the end of this report. Information and data about the 2050 projections is available thru the SANDAG web site:

http://www.sandag.org/index.asp?projectid=355&fuseaction=projects.detail

It should be noted that SANDAG's 2050 projection series and the County's projections differ somewhat by 2030, with SANDAG showing slightly more growth in the unincorporated area . The County General Plan EIR suggests that the SANDAG 2050 series will be closer to the County's estimate (the SANDAG 2050 projections were published mid-way through the development of this report). However, in this project, we use the County data to define the units to be allocated from the unincorporated areas, and SANDAG for the city data, to better match any data on unincorporated areas to what the County itself is using.

3. Residential Land Inventory: The third major source of data used in this assessment was the SANDAG Employment and Residential Land Inventory ("Inventory"), published in September 2009. This Inventory is attached to this report as Appendix 3. This extensive SANDAG project assessed the residential and employment capacity of every parcel ownership in the County, using existing City general plans as the primary factor to determine what each parcel might be capable of holding in the future. Our report relies upon the Inventory's residential capacity data and does not assume any changes in use of land for employment purposes.

The SANDAG Inventory looks only at parcel-based site capacity. Issues of infrastructure, traffic and other factors were not assessed in great detail. However, since the Inventory uses adopted general plans as a key element in defining capacity, it can be reasonably assumed that such constraints and factors have effectively been taken into account.

The Inventory has two major information elements: (a) an estimation of capacity without regard to time frame; and (b) a stratification of that capacity into short, intermediate and longer

term categories based on market timing and related factors. This report does not assess the timing of the growth allocated from the unincorporated areas to the cities (in part because the amount allocated to each city ended up being a relatively small percent of its overall capacity).

The Inventory is extremely detailed and has been extensively reviewed by a muti-interest task force and through map and data review with every city. Most of the future residential capacity the Inventory defines was based on existing City general plans with some adjustments that were agreeable to the cities (information in this paragraph confirmed in phone call with Marney Cox, SANDAG on 2/9/10; see also Page 50 of the Inventory which notes this involvement by local jurisdictions. It is also worth noting that the Employment and Residential Inventory Report was developed by a broadly representative project task force of 37 people from government and the private sector, among them representatives of 13 of the county's 17 cities).

The Inventory was being developed at the same time new projections ("Series 12", the 2050 projections) were being prepared. Because of the many variables involved in both efforts, the Inventory report underscores that its capacity estimates are just that – estimates, and at a particular point in time. The Inventory report also cautions against comparisons of the forecast and the Inventory (page 55), given that different factors are used in each set of numbers. However, the Inventory remains a highly researched data set and is indeed the only resource for any assessment of development capacity in relation to future demands from population growth and change. It is for this reason that the Inventory estimates of future capacity are used in this report to show the approximate scale of how much residential capacity might remain at different growth projections or allocations.

While the Inventory suggests a great deal of capacity for reuse of existing developed areas along with some new, higher densities on vacant land, history shows that many plan-defined densities end up being somewhat reduced when projects are actually built. However, it is also the case that communities generally, and many in San Diego in specific, have been significantly increasing the amount of residential development allowed in many areas in the past few years and it is likely, according to SANDAG staff, that some cities may adopt new plans that allow for even more capacity than indicated in the Inventory. [1]

Finally, it is worth noting that the Inventory report (page 1-2) itself emphasizes the goal of channeling much of the region's future growth into existing incorporated areas:

> The RCP [Regional Comprehensive Plan by SANDAG] contains a long-term vision for the San Diego region, expressed in a malleable framework in which local and regional decisions will be made over time to improve our quality of life. To achieve this goal, the RCP is based on the premise of change; we must plan for our future differently than we have our past for the reasons listed in the elements of the RCP. For example, the vision is to create an urban form comprised of sustainable and balanced communities with a high quality of life.
>
> To help achieve the vision's goals, local jurisdictions, acting together as SANDAG, have endorsed an urban form that channels much of the region's future growth into existing urban (primarily incorporated) communities, preserving and protecting the lifestyle and sensitive environment of our rural (primarily unincorporated) areas. One outcome of this change would be that an increasing

[1] Chula Vista, Oceanside and Vista are a few of the cities that are taking actions to create livable transit oriented communities.

> proportion of our growth will likely occur as redevelopment and urban infill. Thus, the data in this report provides a unique snapshot as well as insight into how prepared the region is today to accommodate the RCP vision of a new urban form.

In addition to this data and these analyses, GreenInfo Network made use of a number of other SANDAG GIS data sets, including the parcel layer, transportation system, community planning area boundaries and others. This data was used for visual display and review; no spatial analysis was performed.

Finally, as part of the project, GreenInfo Network reviewed SANDAG meeting agendas and minutes relating to the San Diego County General Plan Update, the Employment and Residential Land Inventory project, and related information posted on the SANDAG web site.

3. ALTERNATIVE COUNTY GROWTH SCENARIO

Is it reasonable to consider redirecting into cities two-thirds of housing unit growth projected for the unincorporated areas?

This is the key question that this report seeks to answer.

The method used in testing whether this growth scenario is reasonable consisted of the following steps:

1. Identify the residential units to be allocated AWAY from each unincorporated planning area (66% of the proposed number of residential units in the County General Plan Preferred Alternative). This calculation was prepared by CNFF; the methodology and assumptions are described in Appendix 1. *Map 1 shows the location of units to be reallocated to cities.*

2. Identify the 2030 projected NEW residential units for all cities (incorporated areas) from the SANDAG 2050 projections (2030 appears to best correlate with the time horizon of the County's draft General Plan).

3. ASSIGN the units in (1) to each city, proportionate to each city's percent of the total unit capacity as identified in the 2009 Residential and Employment Inventory. Note: this capacity is not time dependent; it is simply the total number of units that could be built under the planning and other conditions operative at the time of the Inventory (2008-09).

4. ADD the 2030 city projections and the assigned units to arrive at each city's total 2030 residential unit allotment.

5. SUBTRACT the 2030 total units from each city's CAPACITY, as defined in the Inventory.

6. Review the REMAINING Inventory capacity for each city, to determine: (a) the share of total unit capacity represented by the allocation of units from county planning areas; and (b) the remaining capacity after this allocation. *See Map 2 which identifies these capacities.*

CONCLUSION: Applying these steps, as indicated in the three tables that follow, shows that almost all cities* in San Diego County have substantially more residential capacity than demand by 2030, even with the additional allocation of units from the County. Removing 47,500 units from the County and redirecting them to cities still leaves the cities of the County with 158,000 units of residential capacity for future growth beyond 2030.

This strongly indicates that a scenario using this approach would be entirely reasonable in the County's process of developing its general plan. See Map 2, later, which illustrates this conclusion.

**The City of Del Mar is an exception, with no units assigned, due to its very small unit capacity.*

RE-ALLOCATING RESIDENTIAL UNITS PROPOSED IN DRAFT COUNTY GENERAL PLAN FROM COUNTY UNINCORPORATED AREAS

PLANNING AREA	Draft GP 2008 Pop	Draft GP 2008 DUs	Draft GP Buildout* Pop	Draft GP Buildout* DUs	Draft GP Pop Increase	Draft GP DU Increase	New Pop Increase	New DU Increase	Alloc. of DUs to cities
Alpine	17,350	6,444	27,390	10,070	10,040	3,626	3,470	1,289	2,337
Bonsall	9,890	3,837	15,940	5,917	6,050	2,080	1,978	767	1,313
Central Mountain	4,646	2,127	6,100	2,869	1,454	742	465	213	529
County Islands	2,098	619	2,500	742	402	123	402	123	0
Crest-Dehesa	10,211	3,530	11,390	4,071	1,179	541	1,021	353	188
Desert	3,520	3,140	17,890	12,377	14,370	9,237	352	314	8,923
Fallbrook	44,378	15,665	61,080	21,211	16,702	5,546	8,876	3,133	2,413
Jamul-Dulzura	9,915	3,167	17,680	5,711	7,765	2,544	992	317	445
Julian	3,049	1,686	4,280	2,300	1,231	614	305	169	0
Lakeside	75,447	27,411	86,720	31,291	11,273	3,880	11,273	3,880	3,147
Mountain Empire	6,472	2,694	14,720	6,110	8,248	3,416	647	269	9,198
North County Metro	42,639	15,970	82,080	29,160	39,441	13,190	10,660	3,993	2,270
North Mountain	2,416	1,515	7,110	3,936	4,694	2,421	242	152	2,243
Otay**	4,690	5	14,780	2,248	10,090	2,243	469	1	2,201
Pala-Pauma	5,618	1,940	12,930	4,335	7,312	2,395	562	194	183
Pendleton-De Luz	43,792	6,667	36,160	7,033	(7,632)	366	(3,816)	183	479
Rainbow	1,815	683	3,640	1,299	1,825	616	363	137	3,809
Ramona	36,753	11,997	55,500	18,205	18,747	6,208	7,351	2,399	0
San Dieguito	30,489	10,854	33,470	12,588	2,981	1,734	2,981	1,734	0
Spring Valley	62,377	20,512	66,990	21,953	4,613	1,441	4,613	1,441	0
Sweetwater	13,187	4,519	15,490	5,275	2,303	756	2,303	756	0
Valle De Oro	42,743	15,477	45,110	16,235	2,367	758	2,367	758	0
Valley Center	18,269	6,513	39,320	13,577	21,051	7,064	3,654	1,303	5,761
TOTAL UNINCORP'D	**491,764**	**166,972**	**678,270**	**238,513**	**186,506**	**71,541**	**61,527**	**23,876**	**47,665**

Source: San Diego County Draft General Plan Draft EIR, pgs 1-43-44, 2.12-22, 27; Cleveland National Forest Foundation ("CNFF")
*The County General Plan does not define a specific date for its projections – in this report, "buildout" is assumed to be approximately 2030. ** 5 DUs in 2008 is from EIR directly, 1-44.

CITY POPULATION AND DWELLING UNIT PROJECTIONS, 2008 and 2030 (from SANDAG 2050 Projections)

							INCREASES, 2008-2030	
CITY	**2008 POP**	**2008 DUs**	**Pop/DU**	**2030 POP**	**2030 DUs**	**Pop/DU**	**Pop Inc 2030**	**DU Inc 2030**
Carlsbad	103,406	43,496	2.4	123,551	49,851	2.5	20,145	6,355
Chula Vista	230,397	77,484	3.0	289,044	94,858	3.0	58,647	17,374
Coronado	23,030	9,543	2.4	26,800	9,637	2.8	3,770	94
Del Mar	4,561	2,535	1.8	4,916	2,606	1.9	355	71
El Cajon	97,555	35,596	2.7	128,547	45,123	2.8	30,992	9,527
Encinitas	63,615	24,805	2.6	73,052	27,882	2.6	9,437	3,077
Escondido	143,259	47,392	3.0	165,267	52,778	3.1	22,008	5,386
Imperial Beach	28,092	9,851	2.9	30,574	10,510	2.9	2,482	659
La Mesa	56,445	25,019	2.3	65,984	28,104	2.3	9,539	3,085
Lemon Grove	25,511	8,820	2.9	28,171	9,381	3.0	2,660	561
National City	56,144	15,773	3.6	69,306	18,804	3.7	13,162	3,031
Oceanside	178,102	64,456	2.8	209,602	73,425	2.9	31,500	8,969
Poway	50,744	16,313	3.1	57,951	18,221	3.2	7,207	1,908
San Diego	1,333,617	508,436	2.6	1,689,254	629,475	2.7	355,637	121,039
San Marcos	82,419	27,556	3.0	101,298	33,095	3.1	18,879	5,539
Santee	55,850	19,538	2.9	69,868	23,798	2.9	14,018	4,260
Solana Beach	13,447	6,509	2.1	14,924	6,869	2.2	1,477	360
Vista	95,400	30,650	3.1	105,062	32,508	3.2	9,662	1,858
TOTAL for CITIES	**2,641,594**	**973,772**	2.7	**3,253,171**	**1,166,925**	2.8	**601,915**	**191,295**
Unincorporated	*489,958*	*166,882*	2.9	*616,829*	*202,882*	3.0	126,871	36,000
TOTAL ALL	**3,131,552**	**1,140,654**	2.7	**3,870,000**	**1,369,807**	2.8	**738,448**	**229,153**

Source: SANDAG, 2050 projections

ALLOCATION OF UNINCORPORATED GROWTH INCREMENT TO CITIES

CITY	2008-2030 Addl. DUs Projected	TOTAL DU CAPACITY from Inventory*	SURPLUS DU Capacity	% *Allocated Among Cities*	DUs from County allocated to cities	% Surplus Used by County Allocation	Remaining DUs	Remaining DU Capacity
Carlsbad	6,355	9,234	2,879	*2%*	1,102	38%	1,777	62%
Chula Vista	17,374	43,410	26,036	*11%*	5,181	20%	20,855	80%
Coronado	94	783	689	*0%*	93	13%	596	87%
Del Mar**	71	56	(15)	*0%*	-	0%	(15)	100%
El Cajon	9,527	11,038	1,511	*3%*	1,103	73%	408	27%
Encinitas	3,077	3,655	578	*1%*	436	75%	142	25%
Escondido	5,386	14,337	8,951	*4%*	1,711	19%	7,240	81%
Imperial Beach	659	3,828	3,169	*1%*	457	14%	2,712	86%
La Mesa	3,085	5,650	2,565	*1%*	674	26%	1,891	74%
Lemon Grove	561	2,220	1,659	*1%*	265	16%	1,394	84%
National City	3,031	8,103	5,072	*2%*	967	19%	4,105	81%
Oceanside	8,969	12,438	3,469	*3%*	1,484	43%	1,985	57%
Poway	1,908	3,041	1,133	*1%*	363	32%	770	68%
San Diego	121,039	252,855	131,816	*63%*	30,399	23%	101,417	77%
San Marcos	5,539	11,510	5,971	*3%*	1,374	23%	4,597	77%
Santee	4,260	6,738	2,478	*2%*	804	32%	1,674	68%
Solana Beach	360	458	98	*0%*	55	56%	43	44%
Vista	1,858	10,043	8,185	*2%*	1,199	15%	6,986	85%
TOTAL for CITIES	193,153	399,393	206,240	*100%*	47,667	23%	158,573	77%

Source: SANDAG 2050 pop. projs., Emply & Res Land Inventory 2009 (*mid-point calculation); **Del Mar showed less capacity than SANDAG projection.

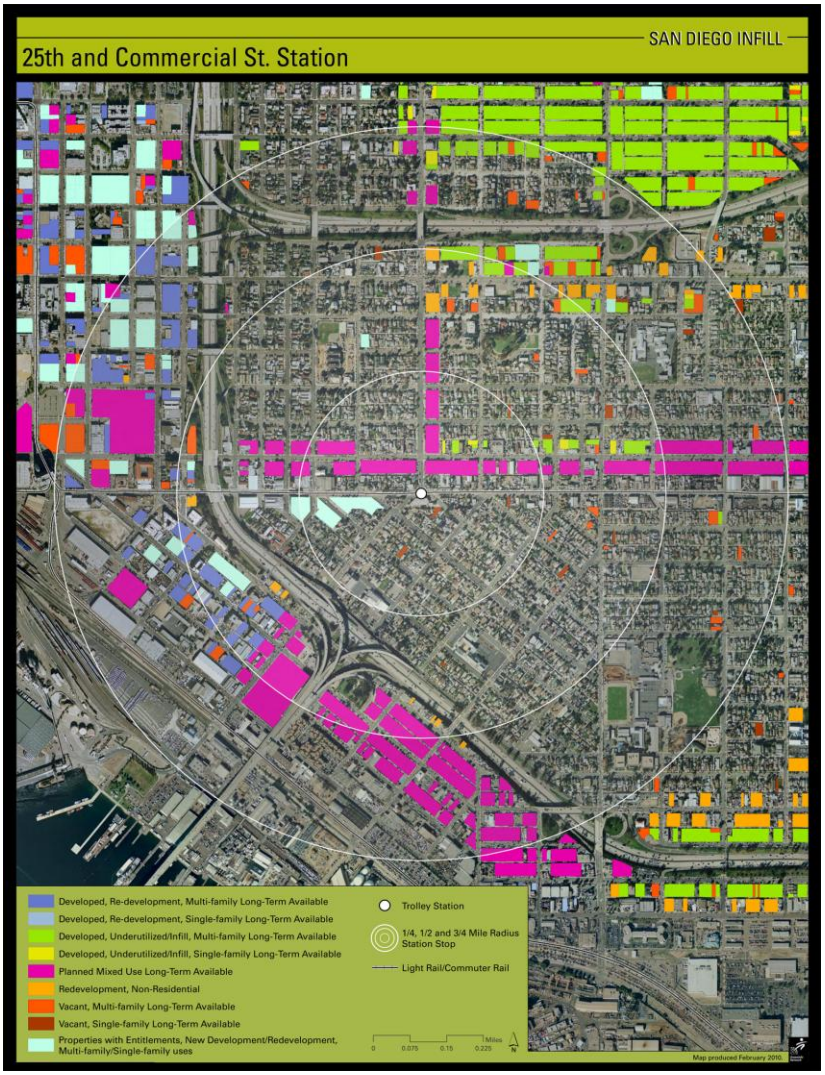
4. VISUALIZING DEVELOPMENT CALLED FOR INFILL SCENARIO

The SANDAG Employment and Residential Inventory defines many types of residential growth in evaluating capacity. The following is a list of five general residential types that applied to the cities of San Diego in this assessment:

- Infill development of some single family and multi-family sites
- Redevelopment/conversion of some single family sites to multi-family units
- Conversion of some mobile home parks to single family or multi-family unit development
- Conversion of some employment sites to residential or mixed uses
- Development of vacant land – single family, multifamily or mixed use development on "greenfield" sites that are currently undeveloped

These types of residential development are all common in San Diego and most California metropolitan areas, where urban housing is being built at rising densities.

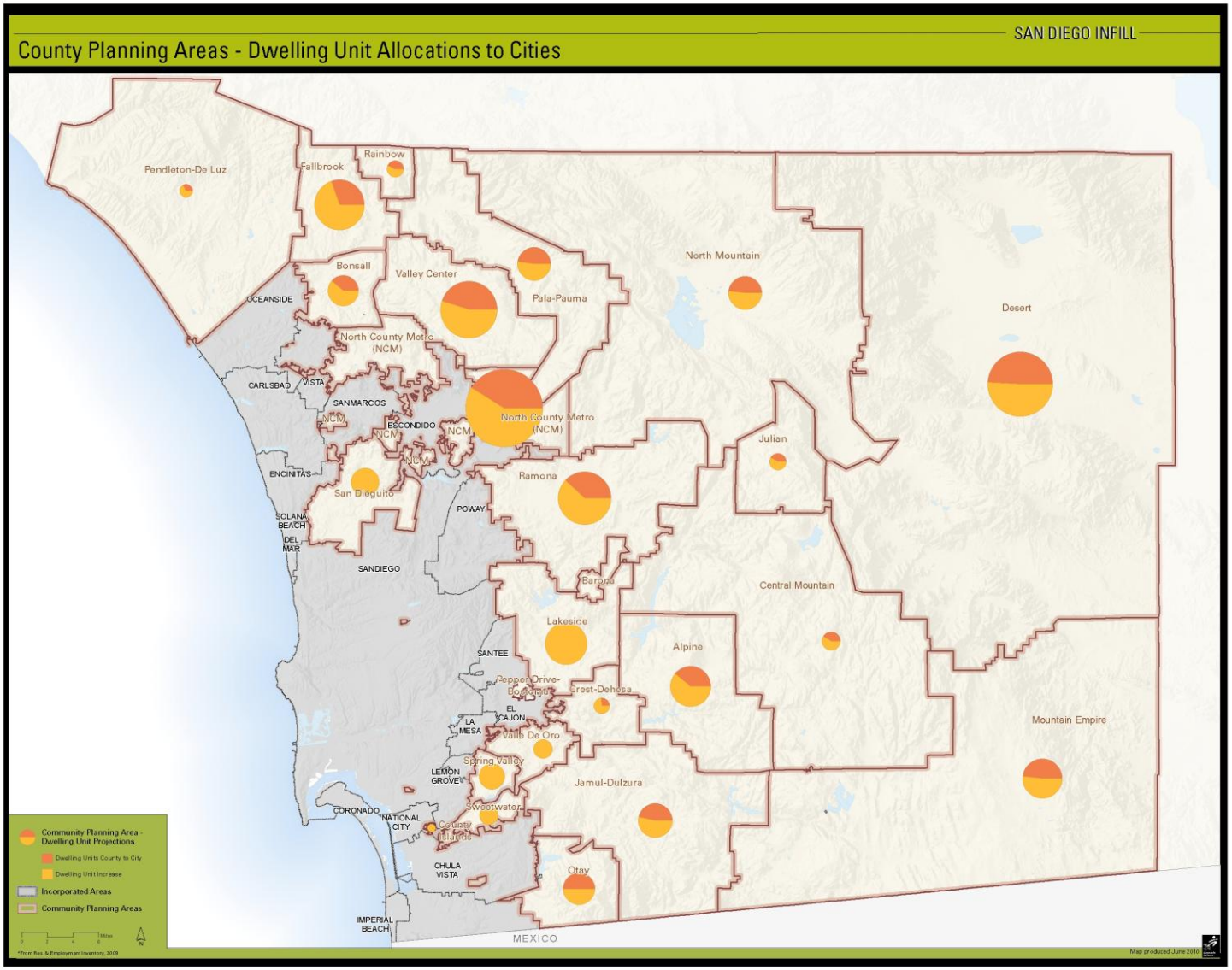
The Alternative Growth Scenario outlined in this report is, like most of the SANDAG Regional Comprehensive Plan, based on these types of housing growth as defined more fully in the Employment and Residential Inventory report. The adjacent figure, entitled 25th and Commercial Street Station, provides a visual representation of this type of infill development. This graphic shows the particular parcels and their residential capacities, around a potential transit station just east of downtown San Diego.



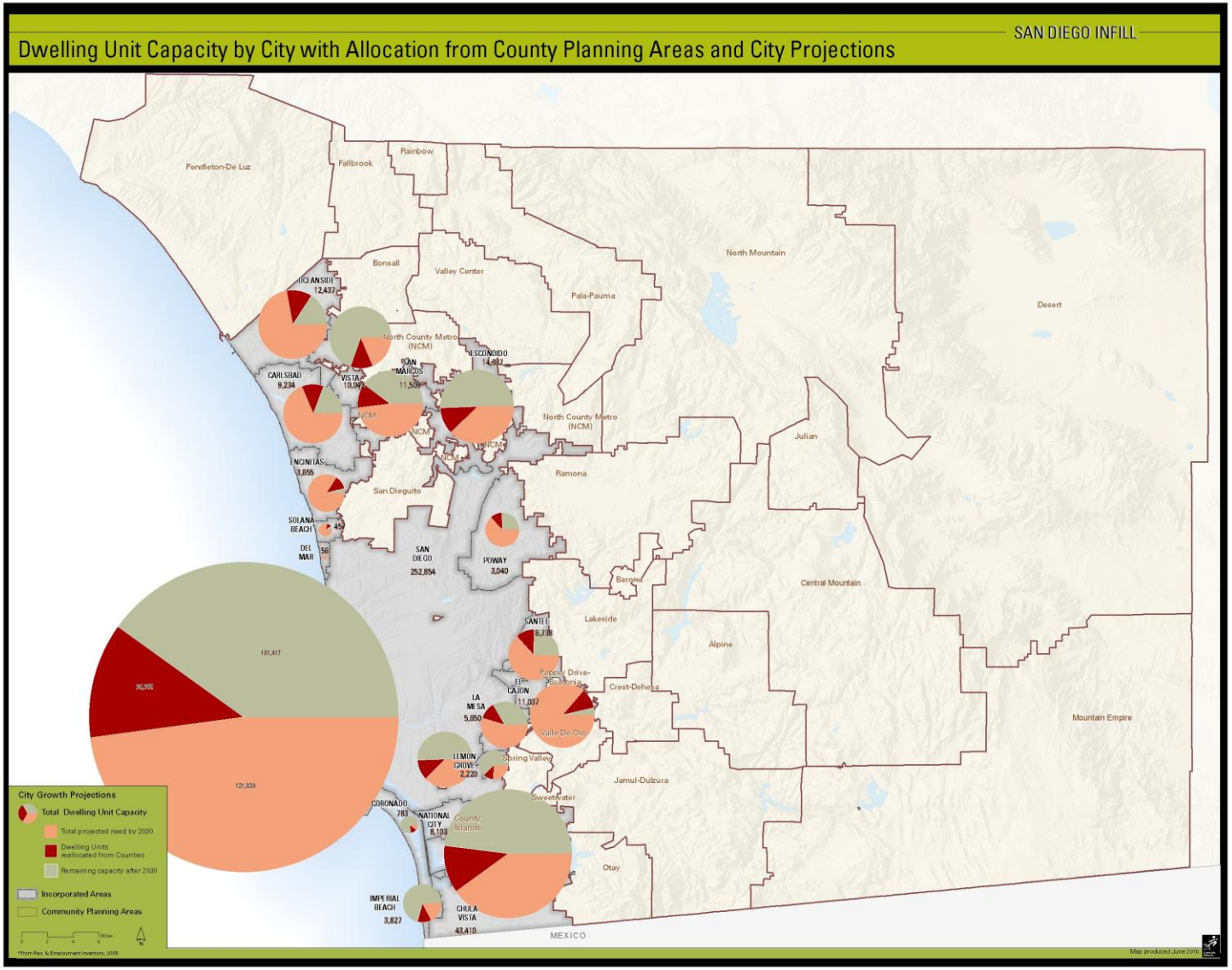
The simulation presented on the following page provides an example of how a typical suburban corridor could be redeveloped with urban scale housing and retail/commercial uses. These simulations are widely used to help policy makers and citizens alike realize the great transformations that can turn currently desolate areas into vibrant urban places.

Simulation of how a commercial street might be developed into an urban center (simulation by Urban Advantage – www.urbanadvantage.com)

MAP 1 – Dwelling Units in County Planning Areas



MAP 2 – Dwelling Unit Capacities in Cities



APPENDICES TO REPORT

Appendix 1:

Method for Re-Allocation of County Residential Units

Prepared by Duncan McFetridge and Crystal Mohr on behalf of the Cleveland National Forest Foundation

May 27, 2010

Appendix 2: (Excel table not included, available for public download as noted)

SANDAG 2050 Growth Projections

Excel data tables from the 2050 projections – available from: http://datawarehouse.sandag.org/

Primary table used: **Cities and the Unincorporated Area.xls**

Prepared by SANDAG staff

February 2010

Appendix 3:

2009 Employment and Residential Land Inventory and Market Analysis

SANDAG

September 30, 2009

Appendix 1

METHOD FOR RE-ALLOCATION OF COUNTY RESIDENTIAL UNITS

Prepared by Duncan McFetridge and Crystal Mohr
on behalf of the Cleveland National Forest Foundation
May 27, 2010

Introduction

The purpose of this memo is to provide the rationale and information that demonstrates how and why the Cleveland National Forest Foundation (CNFF) calculated the amount of dwelling units to be allocated from various unincorporated Planning Areas throughout the County of San Diego (County) and into various incorporated communities. This memo is a supplementary document to the report, "An Alternative Development Scenario for San Diego County," prepared by Larry Orman of GreenInfo Network.

Background

According to the Draft Environmental Impact Report (DEIR) for the County General Plan Update (GPU), one of the objectives for the GPU is to: promote sustainability by locating new development near existing infrastructure, services, and jobs. This is a sound objective however, growth projections outlined within the GPU do not adhere to the objective. The proposed GPU encourages excessive growth in relatively remote areas of the County that do not have sufficient infrastructure and public services. In addition, because these locations are isolated from the County's employment centers (i.e., cities and urbanized suburbs), the GPU's proposed growth would not be located in proximity to jobs. Table 1 demonstrates dwelling unit (DU) buildout projected by the GPU in relation to 2008 DUs. The table also shows the amount of growth predicted east of the County Water Authority boundary (CWA)[1], and compares that growth with the amount of DUs that were present in 2008. As is evident, the growth predicted east of the CWA for the GPU is approximately 68% more dwelling units when compared to existing (2008) dwelling units. Despite this fact, the County makes the following claim:

> The County disagrees with the suggestion that the proposed project (GPU) deviates from its objectives or with the statement that the majority of growth will be in low density designations with scattered development. Approximately 80 percent of the future growth will be accommodated within the County Water Authority boundary, with growth in that area directed to villages. Policies and regulations such as the Conservation Subdivision Program will discourage scattered development.[2]

Although the majority of growth contemplated by the GPU is planned to occur west of the CWA, the amount of growth projected outside of the CWA is excessive. In terms of actual units, if

[1] The County Water Authority boundary is a jurisdictional boundary line. This boundary runs in a north-south direction in San Diego County. It separates the County into two areas: west of the CWA areas are serviced and receive their water supply from the San Diego County Water Authority, east of the CWA are rural areas that receive water supply from independent groundwater wells.

[2] County of San Diego Department of Planning and Land Use. April 2010. Draft Environmental Impact Report Responses to Comments: California Attorney General.

approximately 80% of future growth will be accommodated within the CWA, then approximately 20% or over 47,000 units will be placed east of the CWA, in backcountry San Diego. When considering that in 2008 there were approximately 67,000 units in that area, it is clear that the GPU allocates too much growth in backcountry San Diego.

In addition, allocating growth within the CWA does not guarantee that development will promote sustainability. As is clear within the County's own use of the term "sustainability," which is stated in Objective 2 of the GPU, this term implies development that is near existing infrastructure, services, and jobs. In order for a community to thrive and function as a sustainable community, it is incredibly important that it be located near areas that can be served by transit, because automobile-based transportation is not sustainable. The County itself admits that this is not the case for the development proposed within existing County communities, which are largely within the CWA:

> …The existing communities in the unincorporated County are already "commuter communities" and **are expected to continue to rely on automobiles as their primary form of transportation.**[1]

This explanation demonstrates the fact that with conditions planned under the GPU, true sustainability is not plausible for communities within the CWA, because residents in these communities will rely on the automobile as their primary means of transportation.

Table 1: San Diego County GPU Buildout Projections in Relation to County Water Authority Boundary

Community	2008 DUs	GPU Buildout DUs	2008 DUs East of CWA	GPU Buildout DUs East of CWA	Percentage Increase East of CWA: Comparing 2008 DUs to GPU Buildout DUs
Alpine	17,350	10,070	17,350	5,035	29%
Bonsall	9,890	5,917	0	0	0%
Central Mountain	4,646	2,869	4,646	2,869	62%
County Islands	2,098	742	0	0	0%
Crest-Dehesa	10,211	4,071	10,211	4,071	40%
Desert	3,520	12,377	3,520	12,377	352%
Fallbrook	44,378	21,211	0	0	0%
Jamul-Dulzura	9,915	5,711	9,915	2,856	29%
Julian	3,049	2,300	3,049	2,300	75%
Lakeside	75,447	31,291	0	0	0%
Mountain Empire	6,472	6,110	6,472	6,110	94%
North County Metro	42,639	29,160	0	0	0%
North Mountain	2,416	3,936	2,416	3,936	163%
Otay	4,690	2,248	4,690	2,248	48%
Pala-Pauma	5,618	4,335	5,618	4,335	77%
Pendleton-De Luz	43,792	7,033	0	0	0%
Rainbow	1,815	1,299	0	0	0%
Ramona	36,753	18,205	0	0	0%
San Dieguito	30,489	12,588	0	0	0%
Spring Valley	62,377	21,953	0	0	0%
Sweetwater	13,187	5,275	0	0	0%
Valle De Oro	42,743	16,235	0	0	0%
Valley Center	18,269	13,577	0	0	0%
Total	491,764	238,513	67,887	46,137	68%

Source: Anticipated Increase in Housing Units 2008 – Build-Out under General Plan Update, San Diego County General Plan Update Draft Environmental Impact Report, Page 1-43

Reallocation Rationale

Because the proposed GPU directs too much development to rural areas throughout the County, CNFF sought to undertake a study to determine whether the urbanized areas of the County (i.e., the cities) had sufficient capacity to handle the County's planned growth. To do this, CNFF developed an alternative to the GPU. This alternative reallocates a percentage of growth from the County into incorporated cities throughout the County.

CNFF has extensive knowledge of San Diego's back country and the environmental resource constraints facing these communities. Some locations lack an adequate supply of water while other communities find themselves with contaminated or otherwise degraded water quality. Many backcountry communities have sensitive plant and wildlife habitats and valuable and productive agricultural land. All of these communities lack integrated, efficient transit service and inhabitants are largely automobile dependent. With its knowledge of these constraints, and working from the GPU Buildout Projections (i.e., Table 1), CNFF reallocated dwelling units from backcountry communities to incorporated cities.

CNFF recognizes that backcountry communities should or will experience some amount of growth. A 20% DU growth rate was assumed for communities within the CWA and a 10% growth rate was assumed for communities outside of the CWA. There are various exceptions to this general rule, which are outlined in Table 4, and described in below.

CNFF began its assessment of growth projections for the County by first examining past growth records. Table 2 demonstrates that on average, communities within the CWA grew by 11.68% from 1990 to 1998, by 21.57% from 1998-2008, and 35.74% from 1990-2008. Taking these historical growth trends into account, it seems reasonable that for buildout of the GPU, it would be realistic for these communities to grow by 20% in relation to 2008 values. These communities, despite their location within the CWA, are still rural in nature and are not close to existing infrastructure, particularly transit infrastructure. As such, it does not make sense for these communities to continue to grow at a higher rate than they have in the past.

Table 3 outlines growth that has occurred since 1990 in communities east of the CWA. This table shows that on average, communities east of the CWA grew by 18.91% from 1990 to 1998, by 28.38% from 1998-2008, and 46.56% from 1990-2008. The County is rural by nature, and this is particularly true of communities east of the CWA. The unincorporated communities within the County also have a rich farming history and contain large areas of wilderness and open space. As such, these communities are not amenable to supporting dense populations that are characteristically found in urban or city settings. Due to the lack of infrastructure, public services, water supply, and abundance of natural resources within the rural areas of the County, much of the unincorporated County land cannot support extensive development. For example, the groundwater aquifer within Borrego Springs, a community within the Desert Planning Area, has been in overdraft state for many years, and is expected to be fully depleted within less than 100 years if water consumption in the area continues to occur at the current pace.[3] Given this

[3] County of San Diego Department of Planning and Land Use. November 2008. *Groundwater Investigation Report: Henderson Canyon, Borrego Springs, San Diego County, CA TPM 21058, ER 07-05-001.* http://www.sdcounty.ca.gov/dplu/regulatory/docs/100211/TPM21058-GWIR.pdf

fact, it is incomprehensible that the County plans to increase DU in the Desert Planning Area by over 350% for full build-out of the GPU (refer to Table 1). Development must be immediately curtailed east of the CWA to avoid groundwater overdraft and to prevent other ecological catastrophes.

While the GPU calls for excessive growth in many of the County's Planning Areas, the GPU does provide for responsible growth in other Planning Areas. Table 4 shows the communities that CNFF has determined do not require DU reallocation, because planned growth in these areas is at sustainable levels. As Table 4 shows, the DU increase does not exceed 20% (compared to 2008 DUs) for any of the Planning Areas, and some of the Planning Areas have planned DU increases of less than 10% when compared to 2008 figures.

Open Lots in San Diego County

In rural communities throughout San Diego County there are many vacant lots. A lot, as defined in planning terms, is an area of land held in ownership with definite boundaries. Therefore, these vacant lots represent land that is held by landowners, and could be developed anytime at the will of the landholder(s). Despite the development potential of these vacant lots, the draft GPU makes no mention of these lots or their development potential. Generally speaking, vacant lots in the County are in the form of either singular stand-alone lots, or legal parcels of larger holdings. These vacant lots, no matter their zoning, have a grandfather status of legal parcels with corresponding development potential. For example, in the community of Portrero in eastern San Diego County there are currently 566 Assessor's Parcel Numbers, which correspond to individual lots, yet only 208 of those lots are currently developed, while 358 (approximately 63%) are vacant.[4] These figures clearly demonstrate that land in Portrero does not need to be upzoned, as proposed in the GPU, in order to accommodate additional growth. Given the development potential associated with these vacant lots, it raises the important question: is it necessary to redesignate even more land for development in the County?

[4] Personal correspondence with Eric Lardy. Land Use and Environmental Planner for the County of San Diego Department of Planning and Land Use

Table 2: Growth Projections for Communities within the CWA

		% Change DU 1990-1998	% Change DU 1998-2008	% Change DU 1990-2008
Communities Within CWA (20% Growth Projected)	Alpine*	17.59	20.55	41.75
	Bonsall	7.75	29.34	39.37
	Fallbrook	8.67	28.87	40.05
	Rainbow	10.84	-0.29	10.52
	Ramona*	11.71	17.86	31.66
	Valley Center*	13.52	33.08	51.08
	Average	11.68	21.57	35.74

** These communities do not fall entirely within the boundaries of the CWA, however the majority of their proposed growth is within this area.*

Sources: San Diego County General Plan Update Draft Environmental Impact Report. *Anticipated Increase in Housing Units 2008 – Build-Out under General Plan Update.* Page 1-43. County of San Diego Housing Element 1999-2004, General Plan Part IX. *HOUSEHOLDS*: Unincorporated Area Community Planning Areas and San Diego Region, 1990 and 1998. Page 54, Table 3.

Table 3: Growth Projections for Communities outside of the CWA

		% Change DU 1990-1998	% Change DU 1998-2008	% Change DU 1990-2008
Communities outside of CWA (10% Growth Projected)	Central Mountain	7.62	35.74	46.09
	Crest-Dehesa*	9.17	8.22	18.14
	Desert	16.5	108.93	143.41
	Jamul-Dulzura*	12.61	7.76	21.35
	Mountain Empire	11.12	31.54	46.17
	Otay*	83.33	-54.55	-16.67
	Pala-Pauma*	6.39	25.24	33.24
	Julian	14.21	54.25	76.18
	North Mountain	9.28	38.26	51.1
	Average	18.91	28.38	46.56

** These communities do not fall entirely outside of the boundaries of the CWA, however they are either rural communities or are isolated from infrastructure, and therefore should not have large amounts of growth.*

Sources: San Diego County General Plan Update Draft Environmental Impact Report. *Anticipated Increase in Housing Units 2008 – Build-Out under General Plan Update.* Page 1-43. County of San Diego Housing Element 1999-2004, General Plan Part IX. *HOUSEHOLDS*: Unincorporated Area Community Planning Areas and San Diego Region, 1990 and 1998. Page 54, Table 3.

Table 4: GPU Growth Projections: Communities Left to Grow Consistent with County Forecasts

		2008 Dus	GPU Buildout DUs	% Increase DU 2008-Buildout
Communities left to grow as County Forecasts	County Islands	619	742	19.87
	Lakeside	27,411	31,291	14.15
	Pendleton-De Luz	6,667	7,033	5.5
	San Dieguito	10,854	12,588	15.98
	Spring Valley	20,512	21,953	7.03
	Sweetwater	4,519	5,275	16.73
	Valle De Oro	15,477	16,235	4.9

Sources: San Diego County General Plan Update Draft Environmental Impact Report. *Anticipated Increase in Housing Units 2008 – Build-Out under General Plan Update.* Page 1-43. County of San Diego Housing Element 1999-2004, General Plan Part IX. *HOUSEHOLDS*: Unincorporated Area Community Planning Areas and San Diego Region, 1990 and 1998. Page 54, Table 3.

The San Diego Region

2009 Employment and Residential Land Inventory & Market Analysis

San Diego Regional Economic Development Corporation

SANDAG

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September 30, 2009

Message from the Co-Chairs:

The primary purpose of this study is straightforward: an inventory of developable employment and residential land in the San Diego region. The results from the task force's work show 10,000 acres of developable employment land and 456,740 acres of developable residential land. To be useful, however, these "gross" numbers need to be refined.

For example, for the employment land, a little more than 20 percent can be developed within one year; 60 percent of these "immediately available" acres are concentrated in just four areas; and 90 percent of all parcels are 10 acres or less in size.

For the residential inventory, similar refinements are important. For example, more than 90 percent of the developable land is located in the unincorporated portions of San Diego County and less than 1 percent of the total acres can be developed within one year. Despite the huge acreage difference, the unincorporated communities support densities that average six to eight acres per housing unit; on the other hand, incorporated communities support densities of six to eight housing units per acre.

More analysis performed on the data revealed additional trends. For example, the data portend a change in the character and location of future growth: more multifamily units located in cities, including redevelopment and planned mixed use. Using a database from MarketPointe Reality Advisors, which tracks residential building trends, our research found more than 130,000 housing units in the pipeline at various stages of the development process, and more than 70 percent are planned as multifamily units. In addition to these units in the pipeline, our research found there is significant potential for additional multifamily residential development on 2,480 acres within redevelopment districts and 3,897 acres of planned mixed use (parcels accommodating both residential and employment uses).

The employment and residential land inventory database seems to validate and suggest a changing growth pattern in the region. One outcome to his change would be that an increasing proportion of our growth will likely occur as redevelopment and urban infill, leading to a higher demand for multifamily housing units and require a public infrastructure that can sustain a denser, more urbanized core.

To help disseminate this database, SANDAG is planning to make it available on its Web site under the Regional Economic Development Information System. We hope you find this database as informative and as useful as we do.

Sincerely,

Bob Campbell, Mayor Pro Tem
City of Vista
Co-chair

Julie Meier Wright, President and CEO
San Diego Regional Economic Development Corporation
Co-chair

File Number 2001100

EMPLOYMENT AND RESIDENTIAL LAND INVENTORY AND MARKET ANALYSIS

September 2009

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As of September 3, 2009

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1. INTRODUCTION

One of the primary objectives of this report is to provide an inventory and market analysis of developable employment and residential land in the San Diego region. As the Task Force completes this objective, it will have completed the third update of the Employment Lands Inventory and the first publication of the Residential Lands Inventory. The report maps can be seen using the following link or by contacting SANDAG's Public Information Officer and requesting a copy on CD.

http://www.sandag.org/empreslandinventorymaps

The purpose of compiling the land-based inventory databases is to help address a couple of concerns expressed by land brokers and developers, as well as businesses in our high-technology industry clusters, about the increasing costs, rapid absorption, and pressure to convert existing "industrial" land over to a residential or commercial use. The region has a limited supply of these "prime" industrial sites. In addition, these industrial sites are where a significant portion of our emerging growth high-technology companies are clustered, and these companies and sites provide the best opportunity for future economic growth and expansion. To address the supply concerns, the market analysis from past studies focused on the supply of "immediately available" land (defined as land that can be developed and brought to market in one year or less) and its location within the region. These past studies found that only a small portion of total gross acres could be used to meet the immediate demands of the market, and these immediately available acres are concentrated in a few areas of the region. Although somewhat less severe, these same concerns are identified in this updated report. Also, market pressures have been temporarily reduced because of the national recession that began with steep declines in the construction and financial sectors during December 2007; however, most of the Task Force members believe these issues will surface again once the recession has run its course.

But to view the information solely from these somewhat narrow concerns would miss a broader and essential relationship of the "data" to elements of the San Diego Regional Comprehensive Plan (RCP), developed by SANDAG.

The RCP contains a long-term vision for the San Diego region, expressed in a malleable framework in which local and regional decisions will be made over time to improve our quality of life. To achieve this goal, the RCP is based on the premise of change; we must plan for our future differently than we have our past for the reasons listed in the elements of the RCP. For example, the vision is to create an urban form comprised of sustainable and balanced communities with a high quality of life.

To help achieve the vision's goals, local jurisdictions, acting together as SANDAG, have endorsed an urban form that channels much of the region's future growth into existing urban (primarily incorporated) communities, preserving and protecting the lifestyle and sensitive environment of our rural (primarily unincorporated) areas. One outcome of this change would be that an increasing proportion of our growth will likely occur as redevelopment and urban infill. Thus, the data in this report provides a unique snapshot as well as insight into how prepared the region is today to accommodate the RCP vision of a new urban form. In addition, the Employment and Residential Land Inventory Task Force (Task Force) agreed to review three related issues against the background

of the land use information in this report: the SANDAG-proposed Smart Growth Opportunity Areas, the erosion of prime employment land by nonemployment uses, and urban land use regulations that may make it difficult to achieve the change envisioned in the RCP.

1.1 Organization of the Report

This report provides an inventory of the employment and residential land for selected Planning Areas in the San Diego Region. The report is divided into five major sections, including the Appendix:

- ***Introduction***—This section reviews the primary purpose of the report and discusses the similarities and differences between this report and previous studies. This section also points out a connection between this report and some other regional planning documents developed by SANDAG, such as the RCP.

- ***Findings from the Inventories***—This section summarizes some of the points identified by Task Force members as noteworthy. In addition, this section includes a set of tables that lists the results from the inventory by individual planning area and a set of tables that allows a side-by-side comparison between the inventory of employment and residential land.

- ***Issues Affecting Employment and Residential Land Use and Available Capacity***—This section reviews and analyzes three trends that could have an impact on the existing and future supply of both employment and residential land, as well as the intensity of their use. The section points out that these impacts may make it more difficult to achieve many of the urban form and standard of living goals that have been identified in regionwide planning and strategic documents developed by SANDAG, such as the RCP and the Regional Economic Prosperity Strategy.

- ***Study Background and Technical Approach***—This section discusses the history of the inventory providing some background on its purpose, initial findings, and what has been done to make the database accessible to a broad range of users.

- ***Appendices***—The appendices provides a description and methodology for the inventory, examples of the project procedure, data limitations of the inventory, and a glossary of terms.

2. FINDINGS FROM THE INVENTORIES

2.1. Employment Land Inventory

The 2009 inventory identified 10,000 acres of gross developable employment land in Planning Areas.[1] Of this total available for development, 8,840 acres (88%) are vacant; the remaining acres are located in redevelopment areas.

: ***Nearly 60 percent of the regions gross developable employment land is located in five Planning Areas:*** Otay (2,201 acres or 22%); Otay Mesa (1,343 acres or 13%); Chula Vista (811 acres or 8.1%); Lakeside (792 acres or 7.9%); Carlsbad (454 acres or 4.5%). Two of the top five Planning Areas with the most acres of gross developable employment land are located in the unincorporated County; overall the unincorporated County contains 45 percent of the region's total inventory of developable employment land, the remainder (55%) is located within the incorporated cities.

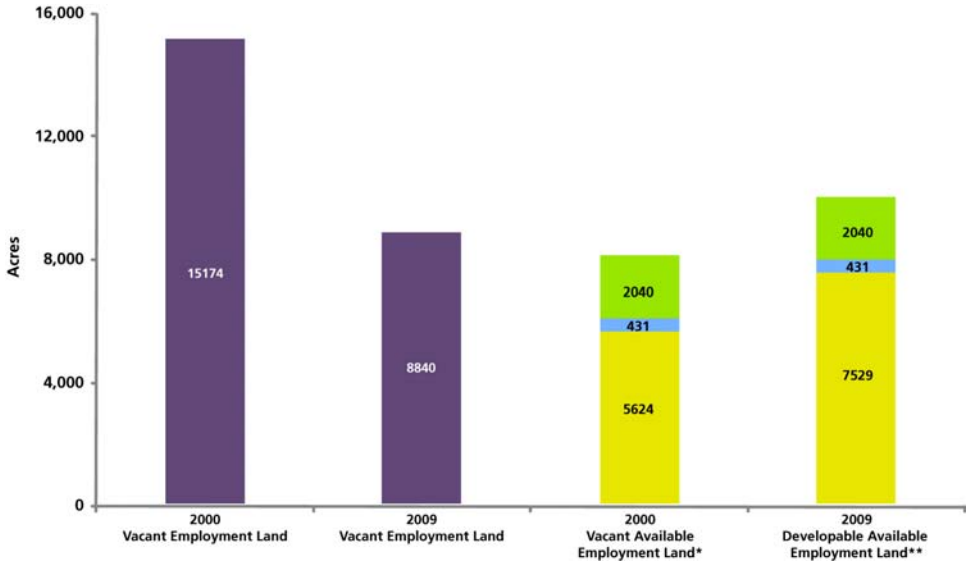
: ***Of the 10,000 gross developable acres, 20 percent (2,040 acres) are immediately available for development*** (can be developed within one year). More than 60 percent of these immediately available acres are located in four Planning Areas: Otay (391 acres or 19.2%); Carlsbad (389 acres or 19.1%); Otay Mesa (343 acres or 16.8%); and Oceanside (169 acres or 8.2%). Over 75 percent (7,529 acres) of the developable acres are categorized as long-term (requiring more than one year to develop), all 1,905 acres of redevelopment are in this long-term category. At the time of the inventory there were 1,423 acres that were classified as under construction, unmarketable, or had the potential to be converted to a nonemployment use.

: ***Between 25 percent and 38 percent of vacant gross developable acres will ultimately not be developed and will be used primarily for support facilities such as roads, walkways, parking, and landscaping.*** Using this range provides an estimate of net developable land of between 5,019 acres and 6,071 acres (estimates exclude 1,905 acres of redevelopment). Applying these net developable factors to the immediately available acres provides a range of between 1,265 acres and 1,530 acres that can be developed within one year to meet market demand.

: ***Four Planning Areas accounted for the majority of the net change between 2000 and 2009:*** Otay Mesa (1,953 acres); Oceanside (865 acres); Chula Vista (611 acres); and Carlsbad (610 acres).

[1] Data Sources: SANDAG, Landcore database for the Series 12 Regional Growth Forecast, 2009 Employment and Residential Land Use Inventory Task Force.

Figure 1
2009 Inventory of Employment Land



** Excludes VPR, VPL, UC, VU*

*** Includes R-ST, R-LT and excludes VPR, VPL, UC, VU*

Figures 2 through 5 on the following pages summarize the total vacant employment land by parcel and contiguous area size and show that 89 percent of the number of available vacant parcels are less than ten acres and account for nearly 40 percent of total available vacant acres. Although parcels in the category of between 21 and 50 acres represent less than 4 percent of all parcels, they account for nearly 25 percent of vacant available acres. There are no single vacant parcels of 200 acres or more, however, there are four areas in the region that offer more than 200 acres of vacant land in contiguous parcels. These contiguous areas of 200 acres or more make up 25 percent of total vacant employment land. Total acres include immediately available, short-term available, and long-term available land.

Figure 2
Total Vacant Single Parcels

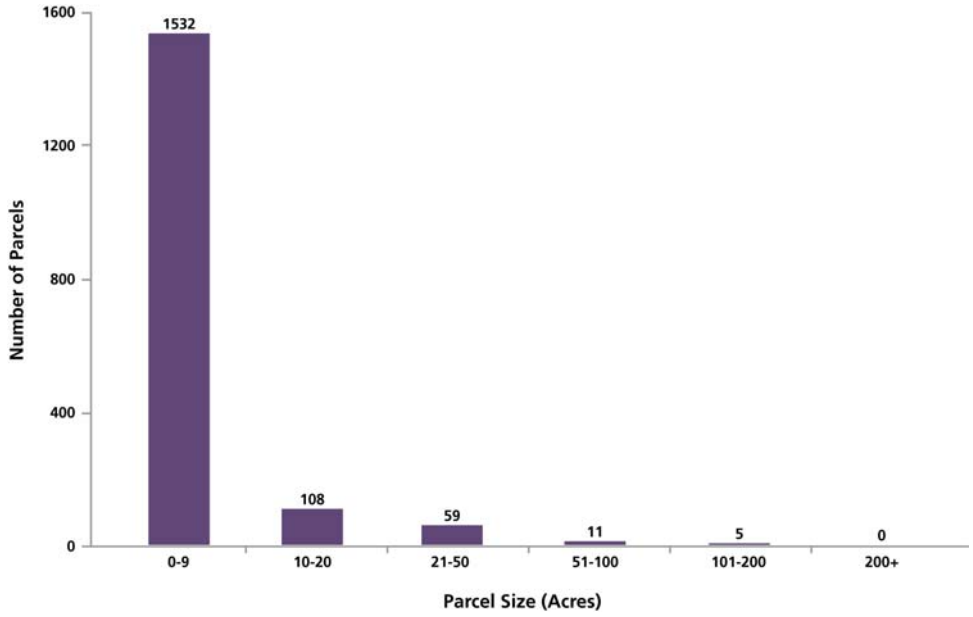


Figure 3
Total Vacant Single Parcels, Percent of Total Vacant Acres by Parcel Size

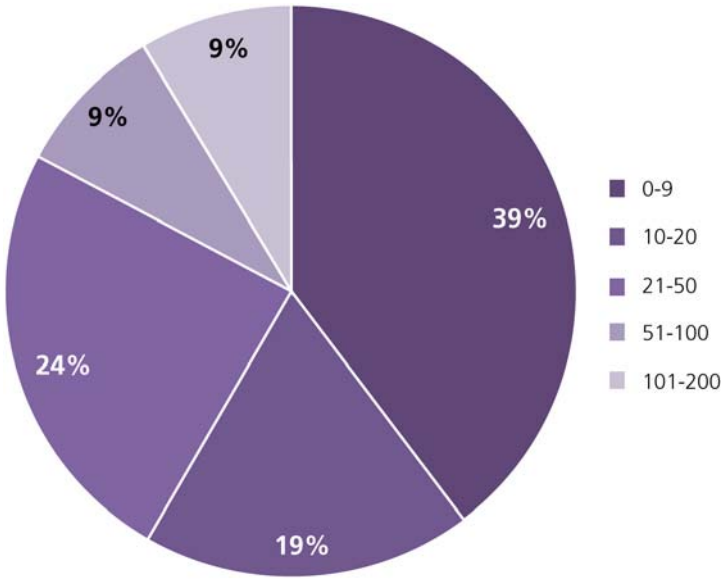


Figure 4
Total Vacant Contiguous Areas

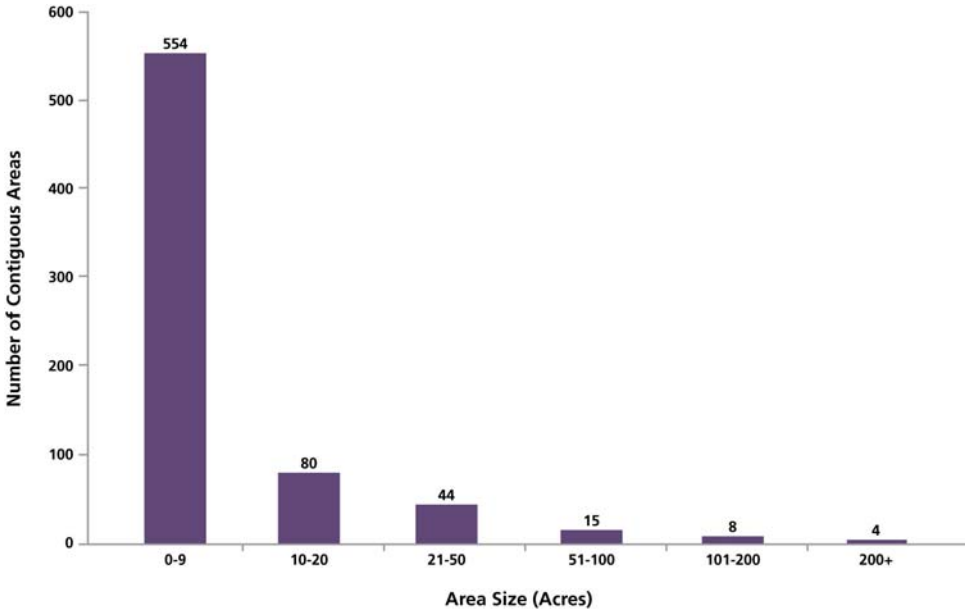
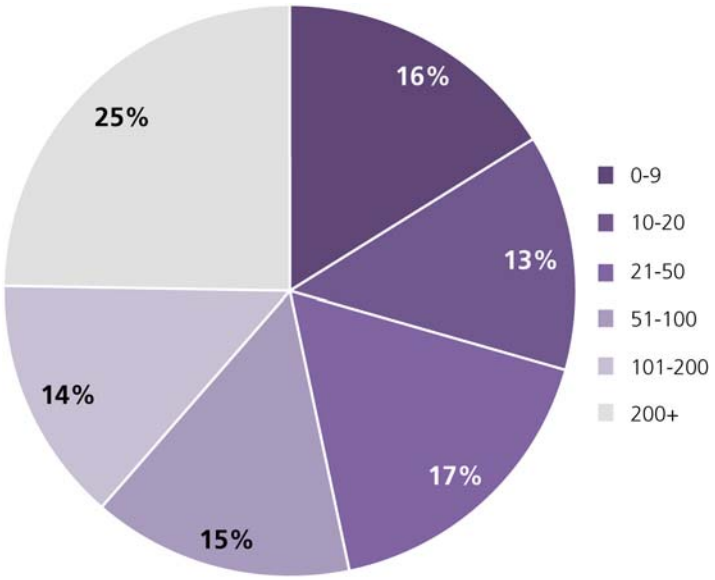


Figure 5
Total Vacant Contiguous Areas, Percent of Total Vacant Acres by Parcel Size



: Figures 6 through 9 summarize the vacant immediately available employment land by parcel size and show that 94 percent of the number of immediately available parcels are less than ten acres and these parcels account for 64 percent of the total immediately available acres. There are no single parcels of immediately available land greater than 200 acres in size; there is one contiguous area between 101 and 200 acres in size. There are two contiguous area in the region of between 51 and 100 acres that account for 6 percent of the total immediately available acres.

Figure 6
Vacant Immediately Available Single Parcels

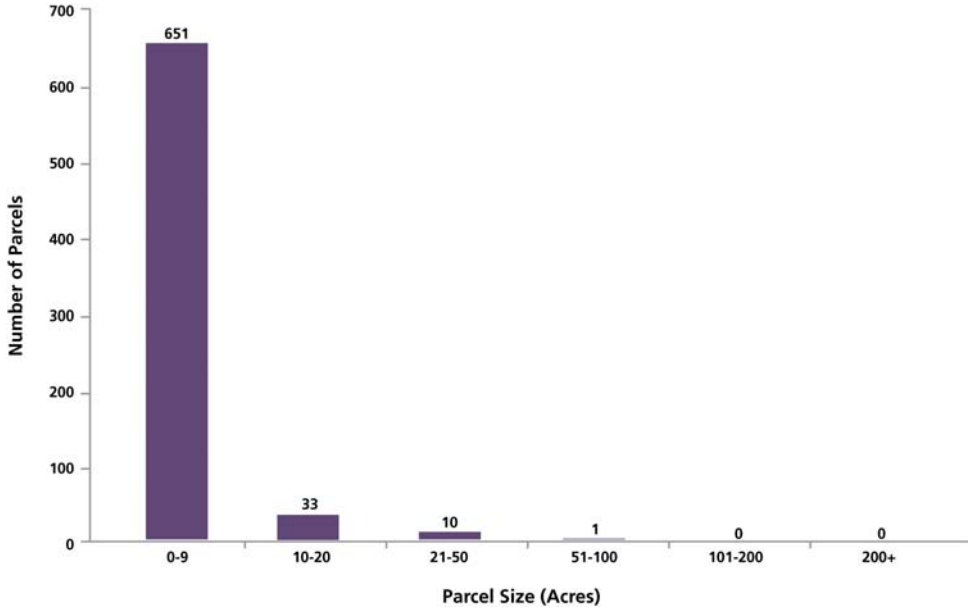


Figure 7
Vacant Immediately Available Single Parcels,
Percent of Total Vacant Immediately Available Acres

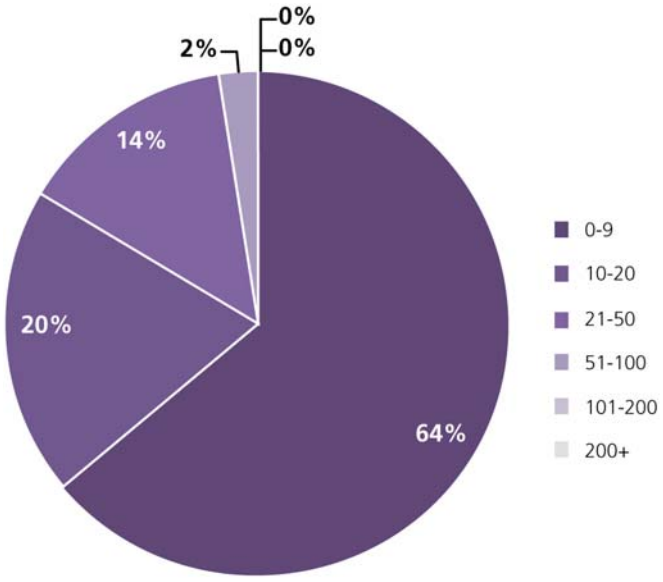


Figure 8
Vacant Immediately Available Contiguous Areas

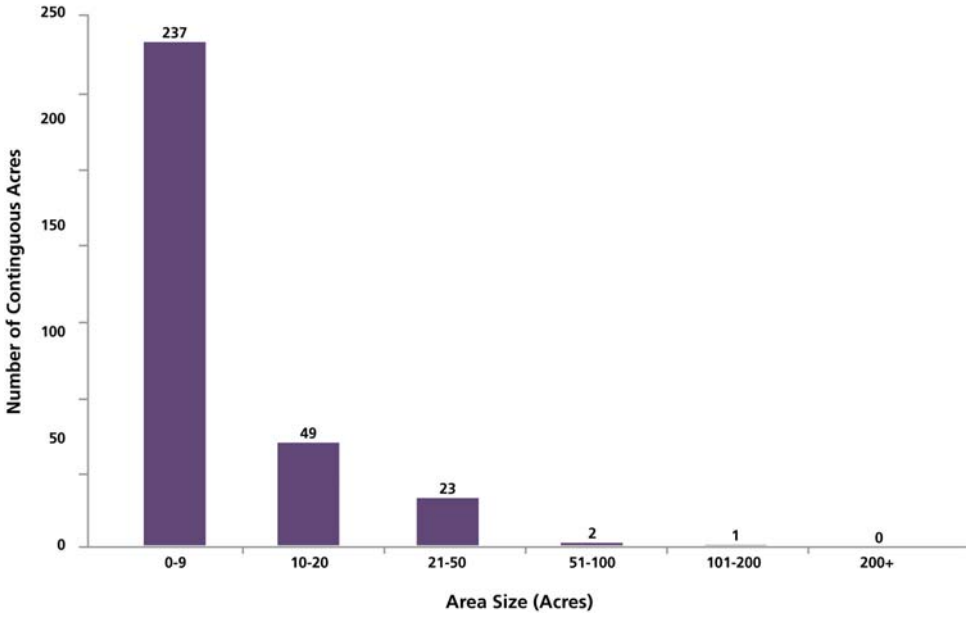


Figure 9
Vacant Immediately Available Contiguous Areas,
Percent of All Vacant Immediately Available Areas

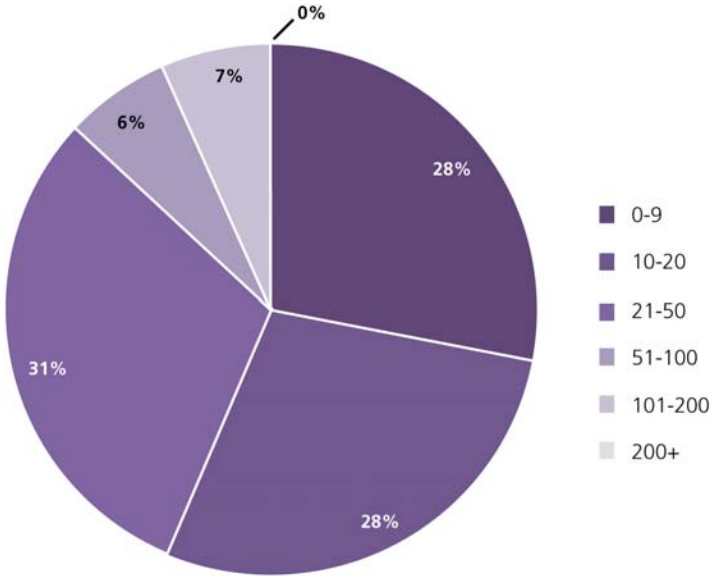


Table 1
2008–2009 Employment Land Inventory Planning Areas in the San Diego Region
Gross Acres

Area Name[5,9]	Employment Land* Gross Acres: Vacant 2000 Emp Acres (1)	Vacant 2009 Emp Acres[1] (2)	2000-2009 Vacant Acres Net Change[11] (3)	Developable 2009 Emp Acres[2] (4)	Net Range - Developable 2009 Emp Acres[3] (5)	All 2009 Emp Acres[4] (6)	Developed 2009 Acres (7)	Market Status Inventory of Employment Land* 2009 Gross Employment Acres by Area: Immediately Available VEI (8)	VPR (9)	VPL (10)	Short-Term Available VENI-ST (11)	R-ST (12)	Long-Term Available VNE (13)	VENI-LT (14)	R-LT (15)	Under Construction UC (16)	Unmarketable VU (17)	Other Redev to Non-Emp (18)
City of Carlsbad	**1,150**	**540**	**(610)**	**454**	**282-341**	**1,876**	**1,332.5**	**240.3**	**148.8**	**-**	**-**	**-**	**59.7**	**5.1**	**0.2**	**18.5**	**68.0**	**3.0**
City of Chula Vista	**1,247**	**636**	**(611)**	**811**	**503-608**	**1,618**	**776.1**	**54.6**	**-**	**-**	**80.3**	**-**	**322.1**	**176.1**	**178.1**	**3.0**	**-**	**27.8**
City of Coronado	**-**	**-**	**-**	**-**	**0-0**	**4**	**3.7**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
City of Del Mar	**-**	**4**	**4**	**4**	**2-3**	**16**	**11.9**	**-**	**-**	**-**	**-**	**-**	**-**	**4.0**	**-**	**-**	**-**	**-**
City of El Cajon	**129**	**120**	**(9)**	**141**	**88-106**	**834**	**677.6**	**0.2**	**35.8**	**-**	**-**	**-**	**83.6**	**-**	**21.8**	**-**	**-**	**15.3**
City of Encinitas	**21**	**9**	**(12)**	**7**	**5-5**	**81**	**70.0**	**-**	**4.1**	**-**	**0.9**	**-**	**2.0**	**-**	**0.3**	**2.2**	**-**	**1.5**
City of Escondido	**337**	**161**	**(176)**	**149**	**92-112**	**913**	**732.8**	**67.9**	**-**	**1.7**	**8.7**	**-**	**66.7**	**0.3**	**3.5**	**14.0**	**2.0**	**15.1**
City of Imperial Beach	**-**	**-**	**-**	**-**	**0-0**	**5**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**4.7**
City of La Mesa	**3**	**1**	**(2)**	**1**	**0-0**	**79**	**60.5**	**0.5**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**18.4**
City of Lemon Grove	**2**	**3**	**1**	**4**	**2-3**	**44**	**33.1**	**1.7**	**-**	**-**	**-**	**-**	**-**	**1.6**	**0.4**	**-**	**-**	**7.5**
City of National City	**19**	**18**	**(1)**	**26**	**16-20**	**537**	**486.6**	**-**	**-**	**-**	**-**	**-**	**5.4**	**12.4**	**8.3**	**-**	**-**	**24.9**
City of Oceanside	**1,263**	**398**	**(865)**	**339**	**210-254**	**1,173**	**756.5**	**162.7**	**-**	**6.6**	**-**	**-**	**113.8**	**37.5**	**18.5**	**75.6**	**1.7**	**-**
City of Poway	**452**	**172**	**(280)**	**172**	**107-129**	**866**	**690.9**	**97.4**	**-**	**-**	**-**	**-**	**2.7**	**71.7**	**-**	**-**	**-**	**3.7**
City of San Diego	**5,305**	**2,075**	**(3,230)**	**2,532**	**1570-1899**	**11,834**	**8,404.6**	**644.3**	**41.2**	**4.6**	**76.7**	**-**	**704.5**	**182.7**	**877.8**	**234.2**	**186.7**	**476.5**
x 32nd Street Naval Station	-	-	-	-	-	13	12.9	-	-	-	-	-	-	-	-	-	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Barrio Logan	39	13	(26)	24	15-18	236	187.5	-	-	-	-	-	13.2	-	11.2	-	-	24.1
Black Mountain Ranch	20	30	10	30	18-22	30	-	-	-	-	-	-	-	29.7	-	-	-	-
Carmel Mountain Ranch	21	3	(18)	0	-	138	134.7	-	-	-	-	-	-	-	-	3.1	-	-
x Carmel Valley	70	-	(70)	-	-	142	141.5	-	-	-	-	-	-	-	-	-	-	-
Centre City	140	21	(119)	31	19-23	163	95.4	-	-	-	-	-	20.7	-	9.9	0.1	-	36.8
City Heights	4	3	(1)	3	2-2	73	56.5	-	-	-	-	-	3.0	0.1	-	-	-	13.7
x Clairemont Mesa	19	-	(19)	-	-	118	113.9	-	-	-	-	-	-	-	-	-	-	3.9
x College Area	-	-	-	-	-	2	-	-	-	-	-	-	-	-	-	-	-	1.8
x Del Mar Mesa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
East Elliott	13	12	(1)	13	8-10	13	-	-	-	-	-	-	-	12.1	1.0	-	-	-
x Eastern Area	-	-	-	-	-	17	-	-	-	-	-	-	-	-	-	-	-	16.9
Encanto Neighborhoods	45	9	(36)	9	5-6	44	27.7	-	-	-	8.6	-	-	-	-	-	-	7.3
x Fairbanks Country Club	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Flower Hill	-	-	-	-	-	6	5.5	-	-	-	-	-	-	-	-	-	-	-
x Golden Hill	-	-	-	-	-	8	1.2	-	-	-	-	-	-	-	-	-	-	6.6
x Harbor	-	-	-	-	-	0	0.1	-	-	-	-	-	-	-	-	-	-	-
Kearny Mesa	255	107	(148)	103	64-77	1,502	1,351.7	48.4	-	-	-	-	0.4	20.2	33.8	37.2	1.2	9.2
x Kensington-Talmadge	-	-	-	-	-	2	-	-	-	-	-	-	-	-	-	-	-	2.0
x La Jolla	-	-	-	-	-	11	3.3	-	-	-	-	-	-	-	-	-	-	7.7
Linda Vista	11	2	(9)	2	1-1	75	54.6	-	-	-	-	-	0.1	1.5	-	-	0.1	18.7
Lindbergh Field	101	1	(100)	-	-	60	46.9	-	-	-	-	-	-	-	-	-	0.7	12.0
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	31	3	(28)	5	3-4	173	117.2	-	-	-	-	-	3.2	0.1	1.6	-	-	51.3
Mira Mesa	401	229	(172)	289	179-217	2,379	2,067.7	91.0	-	-	8.7	-	105.6	11.3	72.6	12.3	0.2	9.4
x Miramar Air Station	-	-	-	-	-	170	170.3	-	-	-	-	-	-	-	-	-	-	-
Miramar Ranch North	68	34	(34)	29	18-22	72	38.7	29.1	-	-	-	-	-	0.0	-	4.7	-	-
x Mission Bay Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Mission Beach	-	-	-	-	-	0	0.2	-	-	-	-	-	-	-	-	-	-	-
Mission Valley	79	30	(49)	35	22-27	342	288.0	4.8	-	-	-	-	21.3	-	9.3	-	3.8	14.6
Navajo	189	89	(100)	124	77-93	358	84.5	1.6	-	-	-	-	82.5	-	40.3	-	4.6	145.0
x NCFUA Reserve	-	-	-	-	-	2	2.1	-	-	-	-	-	-	-	-	-	-	-
x NCFUA Subarea 2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Normal Heights	-	-	-	-	-	0	-	-	-	-	-	-	-	-	-	-	-	0.5
x North Park	-	-	-	-	-	7	1.5	-	-	-	-	-	-	-	-	-	-	5.4
x Ocean Beach	-	-	-	-	-	1	0.1	-	-	-	-	-	-	-	-	-	-	1.0
x Old San Diego	1	1	0	1	1-1	17	14.7	1.3	-	-	-	-	-	-	-	-	0.1	0.9
Otay Mesa[6,7]	2,888	935	(1,953)	1,343	833-1007	2,543	965.0	306.8	31.9	4.6	26.1	-	280.1	65.8	627.7	93.3	126.5	15.2
x Otay Mesa-Nestor	53	4	(49)	24	15-18	93	60.8	-	-	-	-	-	1.2	-	23.1	-	2.5	5.8
x Pacific Beach	-	0	0	-	-	9	4.5	-	-	-	-	-	-	-	-	-	0.1	4.7
Pacific Highlands Ranch	20	22	2	-	-	22	-	-	-	-	-	-	-	-	-	22.0	-	-
x Peninsula	1	8	7	1	1-1	41	25.7	-	-	-	-	-	1.2	-	-	7.0	-	7.6
Rancho Bernardo	145	94	(51)	76	47-57	624	519.1	32.6	-	-	22.7	-	0.9	9.1	10.8	28.9	-	-
x Rancho Encantada	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Rancho Penasquitos	-	-	-	-	-	5	4.9	-	-	-	-	-	-	-	-	-	-	-
Sabre Springs	36	7	(29)	5	3-3	83	74.5	-	-	-	-	-	-	3.6	0.9	3.8	-	-
x San Pasqual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
San Ysidro	46	47	1	16	10-12	89	34.5	-	-	-	-	-	11.0	-	5.4	-	36.2	1.9

: *Table 1*
2008–2009 Employment Land Inventory Planning Areas in the San Diego Region
Gross Acres (cont'd)

	Employment Land* Gross Acres							Market Status Inventory of Employment Land* 2009 Gross Employment Acres by Area									
								Immediately Available			Short-Term Available		Long-Term Available			Under Construction	Unmarketable	Other
Area Name[5,9]	Vacant 2000 Emp Acres	Vacant 2009 Emp Acres [1]	2000-2009 Vacant Acres Net Change[11]	Developable 2009 Emp Acres [2]	Net Range - Developable 2009 Emp Acres [3]	All 2009 Emp Acres [4]	Developed 2009 Acres	VEI	VPR	VPL	VENI-ST	R-ST	VNE	VENI-LT	R-LT	UC	VU	Redev to Non-Emp
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)
Scripps Miramar Ranch	72	56	(16)	44	28-33	262	202.2	31.7	9.3	-	-	-	-	-	3.4	15.2	-	-
x Scripps Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Serra Mesa	-	-	-	-	-	3	3.2	-	-	-	-	-	-	-	-	-	-	-
x Skyline-Paradise Hills	-	-	-	-	-	7	7.5	-	-	-	-	-	-	-	-	-	-	-
Southeastern San Diego	16	6	(10)	27	17-20	143	110.5	-	-	-	4.1	-	1.5	-	21.4	-	-	5.8
x Tierrasanta	4	88	84	87	54-65	98	9.8	-	-	-	-	-	74.2	12.3	-	-	1.8	-
x Tijuana River Valley	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Torrey Highlands	29	21	(8)	21	13-16	32	10.8	20.8	-	-	-	-	-	-	-	-	-	-
Torrey Hills	40	10	(30)	10	6-7	71	61.5	9.9	-	-	-	-	-	-	-	-	-	-
Torrey Pines	79	38	(41)	38	23-28	339	300.7	4.0	-	-	-	-	33.9	-	-	-	0.1	-
University	369	150	(219)	134	83-101	1,138	988.6	62.1	-	-	6.6	-	48.9	16.8	-	6.6	8.9	-
x Uptown	-	2	2	7	5-5	57	2.5	0.2	-	-	-	-	1.8	-	5.3	-	-	47.1
x Via De La Valle	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
City of San Marcos	**468**	**377**	**(91)**	**391**	**243-294**	**1,241**	**787.2**	**32.6**	**-**	**-**	**21.3**	**-**	**1.9**	**285.3**	**50.3**	**34.8**	**0.7**	**26.5**
City of Santee	**124**	**141**	**17**	**270**	**167-202**	**507**	**219.9**	**12.1**	**19.1**	**-**	**64.5**	**-**	**16.0**	**26.2**	**131.9**	**2.9**	**-**	**13.9**
City of Solana Beach	**15**	**1**	**(14)**	**1**	**1-1**	**53**	**51.8**	**-**	**-**	**-**	**-**	**-**	**-**	**1.3**	**-**	**-**	**-**	**0.2**
City of Vista	**399**	**122**	**(277)**	**160**	**99-120**	**1,226**	**1,047.8**	**70.6**	**-**	**-**	**-**	**-**	**20.2**	**25.5**	**43.9**	**4.7**	**0.8**	**12.1**
Uncorporated[8]	**4,240**	**4,063**	**(178)**	**4,538**	**2813-3403**	**5,785**	**1,124.4**	**238.2**	**155.2**	**-**	**178.8**	**-**	**2,595.3**	**800.0**	**570.3**	**2.1**	**93.0**	**27.5**
Alpine	83	218	135	236	146-177	258	20.8	-	-	-	-	-	217.8	-	18.1	-	-	1.6
x Barona	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Bonsall	3	6	3	8	5-6	8	-	-	-	-	-	-	5.7	-	2.5	-	-	-
x Central Mountain	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x County Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Desert	180	197	17	217	135-163	221	3.7	-	-	-	-	-	197.3	-	20.2	-	-	-
Fallbrook	88	252	164	260	161-195	332	53.3	-	-	-	-	-	242.9	9.3	8.0	-	-	18.4
x Jamul-Dulzura	2	2	-	2	1-2	10	8.2	-	-	-	-	-	2.2	-	-	-	-	-
x Julian	21	0	(21)	8	5-6	18	9.7	-	-	-	-	-	0.2	-	7.9	-	-	-
Lakeside	702	668	(34)	792	491-594	1,045	250.7	-	-	-	155.7	-	52.7	457.7	126.0	2.1	0.2	-
x Mountain Empire	194	223	29	359	223-270	400	40.7	-	-	-	-	-	222.9	-	136.5	-	-	-
x North County Metro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x North Mountain	-	-	-	1	-	3	2.1	-	-	-	-	-	-	-	0.6	-	-	-
Otay[10]	2,357	2,205	(152)	2,201	1365-1651	2,294	-	236.1	155.2	-	-	-	1,459.6	261.4	89.2	-	92.8	-
x Pala-Pauma	-	-	-	-	-	10	10.0	-	-	-	-	-	-	-	-	-	-	-
x Pendleton-De Luz	-	-	-	-	-	267	266.8	-	-	-	-	-	-	-	-	-	-	-
x Rainbow	-	11	10.8	11	7-8	16	5.0	-	-	-	-	-	10.8	-	-	-	-	-
Ramona	499	156	(343)	259	161-194	354	90.6	-	-	-	-	-	110.0	46.3	102.8	-	-	4.2
San Dieguito	23	7	(16)	7	5-6	163	153.3	-	-	-	-	-	1.4	6.0	-	-	-	2.5
Spring Valley	53	49	(4)	63	39-48	244	180.6	2.2	-	-	23.1	-	5.0	19.2	14.0	-	-	-
x Sweetwater	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Valle De Oro	12	12	-	24	15-18	30	6.7	-	-	-	-	-	12.1	-	11.4	-	-	-
x Valley Center	23	55	32	88	54-66	111	22.1	-	-	-	-	-	54.7	-	33.1	-	-	0.7
Regional Total	15,174	8,840	(6,334)	10,000	6200-7500	28,692	17,268	1,623	404	13	431	-	3,994	1,630	1,905	392	353	679

[1] Includes VNE, VENI-LT, VEI, VENI-ST, VPR, VPL, UC, VU

[2] Includes VNE, VENI-LT, R-LT, VEI, VENI-ST, R-ST, VPR, and VPL

[3] To calculate net figures, a range of 62%-75% was applied to the "Developable 2009 Emp Acres" column.

[4] Includes developed acres, VNE, VENI-LT, R-LT, VEI, VENI-ST, R-ST, VPR, VPL, UC, VU, and Redev to Non-Emp

[5] The areas represent Spheres of Influence, rather than City boundaries.

[6] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.

[7] Vernal pool litigatin in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels.

[8] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for furthe details on their General Plan Update.

[9] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.

[10] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.

[11] Net change reflects the sum of the acres added and absorbed over the period. More acres added than absorbed results in an acreage gain over the period; more acres absorbed than added results in an acreage loss over the period. For further detail on net change, see the Glossary.

x The area is not reflected on a map or summary sheet in this report.

* Employment Land does not include land designated as retail.

: ***Table 2***
2008–2009 Employment Land Inventory Planning Areas in the San Diego Region
Percent of Gross Acres

	Employment Land* Gross Acres							Market Status Inventory of Employment Land* Percent of Regional Totals by Code and Area									
								Immediately Available			Short-Term Available		Long-Term Available			Under Construction	Unmarketable	Other
Area Name[5,9]	Vacant 2000 Emp Acres	Vacant 2009 Emp Acres [1]	2000-2009 Vacant Acres Net Change[11]	Developable 2009 Emp Acres [2]	Net Range - Developable 2009 Emp Acres [3]	All 2009 Emp Acres [4]	Developed 2009 Acres	VEI	VPR	VPL	VENI-ST	R-ST	VNE	VENI-LT	R-LT	UC	VU	Redev to Non-Emp
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)
City of Carlsbad	**1,150**	**540**	**(610)**	**454**	**282-341**	**1,876**	**1,332.5**	**14.8%**	**36.8%**	**-**	**-**	**-**	**1.5%**	**0.3%**	**0.0%**	**4.7%**	**19.3%**	**0.4%**
City of Chula Vista	**1,247**	**636**	**(611)**	**811**	**503-608**	**1,618**	**776.1**	**3.4%**	**-**	**-**	**18.6%**	**-**	**8.1%**	**10.8%**	**9.3%**	**0.8%**	**-**	**4.1%**
City of Coronado	**-**	**-**	**-**	**-**	**0-0**	**4**	**3.7**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
City of Del Mar	**-**	**4**	**4**	**4**	**2-3**	**16**	**11.9**	**-**	**-**	**-**	**-**	**-**	**-**	**0.2%**	**-**	**-**	**-**	**-**
City of El Cajon	**129**	**120**	**(9)**	**141**	**88-106**	**834**	**677.6**	**0.0%**	**8.8%**	**-**	**-**	**-**	**2.1%**	**-**	**1.1%**	**-**	**-**	**2.3%**
City of Encinitas	**21**	**9**	**(12)**	**7**	**5-5**	**81**	**70.0**	**-**	**1.0%**	**-**	**0.2%**	**-**	**0.0%**	**-**	**0.0%**	**0.5%**	**-**	**0.2%**
City of Escondido	**337**	**161**	**(176)**	**149**	**92-112**	**913**	**732.8**	**4.2%**	**-**	**12.9%**	**2.0%**	**-**	**1.7%**	**0.0%**	**0.2%**	**3.6%**	**0.6%**	**2.2%**
City of Imperial Beach	**-**	**-**	**-**	**-**	**0-0**	**5**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.7%**
City of La Mesa	**3**	**1**	**(2)**	**1**	**0-0**	**79**	**60.5**	**0.0%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**2.7%**
City of Lemon Grove	**2**	**3**	**1**	**4**	**2-3**	**44**	**33.1**	**0.1%**	**-**	**-**	**-**	**-**	**-**	**0.1%**	**0.0%**	**-**	**-**	**1.1%**
City of National City	**19**	**18**	**(1)**	**26**	**16-20**	**537**	**486.6**	**-**	**-**	**-**	**-**	**-**	**0.1%**	**0.8%**	**0.4%**	**-**	**-**	**3.7%**
City of Oceanside	**1,263**	**398**	**(865)**	**339**	**210-254**	**1,173**	**756.5**	**10.0%**	**-**	**51.1%**	**-**	**-**	**2.8%**	**2.3%**	**1.0%**	**19.3%**	**0.5%**	**-**
City of Poway	**452**	**172**	**(280)**	**172**	**107-129**	**866**	**690.9**	**6.0%**	**-**	**-**	**-**	**-**	**0.1%**	**4.4%**	**-**	**-**	**-**	**0.5%**
City of San Diego	**5,305**	**2,075**	**(3,230)**	**2,532**	**1570-1899**	**11,834**	**8,404.6**	**39.7%**	**10.2%**	**36.1%**	**17.8%**	**-**	**17.6%**	**11.2%**	**46.1%**	**59.8%**	**52.9%**	**70.2%**
x 32nd Street Naval Station	-	-	-	-	-	13	12.9	-	-	-	-	-	-	-	-	-	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Barrio Logan	39	13	(26)	24	15-18	236	187.5	-	-	-	-	-	0.3%	-	0.6%	-	-	3.6%
Black Mountain Ranch	20	30	10	30	18-22	30	-	-	-	-	-	-	-	1.8%	-	-	-	-
Carmel Mountain Ranch	21	3	(18)	0	-	138	134.7	-	-	-	-	-	-	-	-	0.8%	-	-
x Carmel Valley	70	-	(70)	-	-	142	141.5	-	-	-	-	-	-	-	-	-	-	-
Centre City	140	21	(119)	31	19-23	163	95.4	-	-	-	-	-	0.5%	-	0.5%	0.0%	-	5.4%
City Heights	4	3	(1)	3	2-2	73	56.5	-	-	-	-	-	0.1%	0.0%	-	-	-	2.0%
x Clairemont Mesa	19	-	(19)	-	-	118	113.9	-	-	-	-	-	-	-	-	-	-	0.6%
x College Area	-	-	-	-	-	2	-	-	-	-	-	-	-	-	-	-	-	0.3%
x Del Mar Mesa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
East Elliott	13	12	(1)	13	8-10	13	-	-	-	-	-	-	-	0.7%	0.1%	-	-	-
x Eastern Area	-	-	-	-	-	17	-	-	-	-	-	-	-	-	-	-	-	2.5%
Encanto Neighborhoods	45	9	(36)	9	5-6	44	27.7	-	-	-	2.0%	-	-	-	-	-	-	1.1%
x Fairbanks Country Club	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Flower Hill	-	-	-	-	-	6	5.5	-	-	-	-	-	-	-	-	-	-	-
x Golden Hill	-	-	-	-	-	8	1.2	-	-	-	-	-	-	-	-	-	-	1.0%
x Harbor	-	-	-	-	-	0	0.1	-	-	-	-	-	-	-	-	-	-	-
Kearny Mesa	255	107	(148)	103	64-77	1,502	1,351.7	3.0%	-	-	-	-	0.0%	1.2%	1.8%	9.5%	0.3%	1.3%
x Kensington-Talmadge	-	-	-	-	-	2	-	-	-	-	-	-	-	-	-	-	-	0.3%
x La Jolla	-	-	-	-	-	11	3.3	-	-	-	-	-	-	-	-	-	-	1.1%
Linda Vista	11	2	(9)	2	1-1	75	54.6	-	-	-	-	-	0.0%	0.1%	-	-	0.0%	2.8%
Lindbergh Field	101	1	(100)	-	-	60	46.9	-	-	-	-	-	-	-	-	-	0.2%	1.8%
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	31	3	(28)	5	3-4	173	117.2	-	-	-	-	-	0.1%	0.0%	0.1%	-	-	7.6%
Mira Mesa	401	229	(172)	289	179-217	2,379	2,067.7	5.6%	-	-	2.0%	-	2.6%	0.7%	3.8%	3.1%	0.1%	1.4%
x Miramar Air Station	-	-	-	-	-	170	170.3	-	-	-	-	-	-	-	-	-	-	-
Miramar Ranch North	68	34	(34)	29	18-22	72	38.7	1.8%	-	-	-	-	-	0.0%	-	1.2%	-	-
x Mission Bay Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Mission Beach	-	-	-	-	-	0	0.2	-	-	-	-	-	-	-	-	-	-	-
Mission Valley	79	30	(49)	35	22-27	342	288.0	0.3%	-	-	-	-	0.5%	-	0.5%	-	1.1%	2.1%
Navajo	189	89	(100)	124	77-93	358	84.5	0.1%	-	-	-	-	2.1%	-	2.1%	-	1.3%	21.4%
x NCFUA Reserve	-	-	-	-	-	2	2.1	-	-	-	-	-	-	-	-	-	-	-
x NCFUA Subarea 2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Normal Heights	-	-	-	-	-	0	-	-	-	-	-	-	-	-	-	-	-	0.1%
x North Park	-	-	-	-	-	7	1.5	-	-	-	-	-	-	-	-	-	-	0.8%
x Ocean Beach	-	-	-	-	-	1	0.1	-	-	-	-	-	-	-	-	-	-	0.1%
x Old San Diego	1	1	0	1	1-1	17	14.7	0.1%	-	-	-	-	-	-	-	-	0.0%	0.1%
Otay Mesa[6,7]	2,888	935	(1,953)	1,343	833-1007	2,543	965.0	18.9%	7.9%	36.1%	6.1%	-	7.0%	4.0%	32.9%	23.8%	35.9%	2.2%
x Otay Mesa-Nestor	53	4	(49)	24	15-18	93	60.8	-	-	-	-	-	0.0%	-	1.2%	-	0.7%	0.8%
x Pacific Beach	-	0	0	-	-	9	4.5	-	-	-	-	-	-	-	-	-	0.0%	0.7%
Pacific Highlands Ranch	20	22	2	-	-	22	-	-	-	-	-	-	-	-	-	5.6%	-	-
x Peninsula	1	8	7	1	1-1	41	25.7	-	-	-	-	-	0.0%	-	-	1.8%	-	1.1%
Rancho Bernardo	145	94	(51)	76	47-57	624	519.1	2.0%	-	-	5.3%	-	0.0%	0.6%	0.6%	7.4%	-	-
x Rancho Encantada	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Rancho Penasquitos	-	-	-	-	-	5	4.9	-	-	-	-	-	-	-	-	-	-	-
Sabre Springs	36	7	(29)	5	3-3	83	74.5	-	-	-	-	-	-	0.2%	0.0%	1.0%	-	-
x San Pasqual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
San Ysidro	46	47	1	16	10-12	89	34.5	-	-	-	-	-	0.3%	-	0.3%	-	10.3%	0.3%

: ***Table 2***
2008–2009 Employment Land Inventory Planning Areas in the San Diego Region
Percent of Gross Acres (cont'd)

	Employment Land* Gross Acres							Market Status Inventory of Employment Land* Percent of Regional Totals by Code and Area									
								Immediately Available			Short-Term Available		Long-Term Available			Under Construction	Unmarketable	Other
Area Name[5,9]	Vacant 2000 Emp Acres	Vacant 2009 Emp Acres [1]	2000-2009 Vacant Acres Net Change[11]	Developable 2009 Emp Acres [2]	Net Range - Developable 2009 Emp Acres [3]	All 2009 Emp Acres [4]	Developed 2009 Acres	VEI	VPR	VPL	VENI-ST	R-ST	VNE	VENI-LT	R-LT	UC	VU	Redev to Non-Emp
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)
Scripps Miramar Ranch	72	56	(16)	44	28-33	262	202.2	2.0%	2.3%	-	-	-	-	-	0.2%	3.9%	-	-
x Scripps Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Serra Mesa	-	-	-	-	-	3	3.2	-	-	-	-	-	-	-	-	-	-	-
x Skyline-Paradise Hills	-	-	-	-	-	7	7.5	-	-	-	-	-	-	-	-	-	-	-
Southeastern San Diego	16	6	(10)	27	17-20	143	110.5	-	-	-	0.9%	-	0.0%	-	1.1%	-	-	0.9%
x Tierrasanta	4	88	84	87	54-65	98	9.8	-	-	-	-	-	1.9%	0.8%	-	-	0.5%	-
x Tijuana River Valley	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Torrey Highlands	29	21	(8)	21	13-16	32	10.8	1.3%	-	-	-	-	-	-	-	-	-	-
Torrey Hills	40	10	(30)	10	6-7	71	61.5	0.6%	-	-	-	-	-	-	-	-	-	-
Torrey Pines	79	38	(41)	38	23-28	339	300.7	0.2%	-	-	-	-	0.8%	-	-	-	0.0%	-
University	369	150	(219)	134	83-101	1,138	988.6	3.8%	-	-	1.5%	-	1.2%	1.0%	-	1.7%	2.5%	-
x Uptown	-	2	2	7	5-5	57	2.5	0.0%	-	-	-	-	0.0%	-	0.3%	-	-	6.9%
x Via De La Valle	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
City of San Marcos	**468**	**377**	**(91)**	**391**	**243-294**	**1,241**	**787.2**	**2.0%**	**-**	**-**	**4.9%**	**-**	**0.0%**	**17.5%**	**2.6%**	**8.9%**	**0.2%**	**3.9%**
City of Santee	**124**	**141**	**17**	**270**	**167-202**	**507**	**219.9**	**0.7%**	**4.7%**	**-**	**15.0%**	**-**	**0.4%**	**1.6%**	**6.9%**	**0.7%**	**-**	**2.0%**
City of Solana Beach	**15**	**1**	**(14)**	**1**	**1-1**	**53**	**51.8**	**-**	**-**	**-**	**-**	**-**	**-**	**0.1%**	**-**	**-**	**-**	**0.0%**
City of Vista	**399**	**122**	**(277)**	**160**	**99-120**	**1,226**	**1,047.8**	**4.4%**	**-**	**-**	**-**	**-**	**0.5%**	**1.6%**	**2.3%**	**1.2%**	**0.2%**	**1.8%**
Uncorporated[8]	**4,240**	**4,063**	**(178)**	**4,538**	**2813-3403**	**5,785**	**1,124.4**	**14.7%**	**38.4%**	**-**	**41.5%**	**-**	**65.0%**	**49.1%**	**29.9%**	**0.5%**	**26.3%**	**4.1%**
Alpine	83	218	135	236	146-177	258	20.8	-	-	-	-	-	5.5%	-	1.0%	-	-	0.2%
x Barona	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Bonsall	3	6	3	8	5-6	8	-	-	-	-	-	-	0.1%	-	0.1%	-	-	-
x Central Mountain	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x County Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Desert	180	197	17	217	135-163	221	3.7	-	-	-	-	-	4.9%	-	1.1%	-	-	-
Fallbrook	88	252	164	260	161-195	332	53.3	-	-	-	-	-	6.1%	0.6%	0.4%	-	-	2.7%
x Jamul-Dulzura	2	2	-	2	1-2	10	8.2	-	-	-	-	-	0.1%	-	-	-	-	-
x Julian	21	0	(21)	8	5-6	18	9.7	-	-	-	-	-	0.0%	-	0.4%	-	-	-
Lakeside	702	668	(34)	792	491-594	1,045	250.7	-	-	-	36.1%	-	1.3%	28.1%	6.6%	0.5%	0.1%	-
x Mountain Empire	194	223	29	359	223-270	400	40.7	-	-	-	-	-	5.6%	-	7.2%	-	-	-
x North County Metro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x North Mountain	-	-	-	1	-	3	2.1	-	-	-	-	-	-	-	0.0%	-	-	-
Otay[10]	2,357	2,205	(152)	2,201	1365-1651	2,294	-	14.5%	38.4%	-	-	-	36.5%	16.0%	4.7%	-	26.3%	-
x Pala-Pauma	-	-	-	-	-	10	10.0	-	-	-	-	-	-	-	-	-	-	-
x Pendleton-De Luz	-	-	-	-	-	267	266.8	-	-	-	-	-	-	-	-	-	-	-
x Rainbow	-	11	10.8	11	7-8	16	5.0	-	-	-	-	-	0.3%	-	-	-	-	-
Ramona	499	156	(343)	259	161-194	354	90.6	-	-	-	-	-	2.8%	2.8%	5.4%	-	-	0.6%
San Dieguito	23	7	(16)	7	5-6	163	153.3	-	-	-	-	-	0.0%	0.4%	-	-	-	0.4%
Spring Valley	53	49	(4)	63	39-48	244	180.6	0.1%	-	-	5.4%	-	0.1%	1.2%	0.7%	-	-	-
x Sweetwater	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Valle De Oro	12	12	-	24	15-18	30	6.7	-	-	-	-	-	0.3%	-	0.6%	-	-	-
x Valley Center	23	55	32	88	54-66	111	22.1	-	-	-	-	-	1.4%	-	1.7%	-	-	0.1%
															-			
Regional Total	15,174	8,840	(6,334)	10,000	6200-7500	28,692	17,268	100.0%	100.0%	100.0%	100.0%	-	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

[1] Includes VNE, VENI-LT, VEI, VENI-ST, VPR, VPL, UC, VU
[2] Includes VNE, VENI-LT, R-LT, VEI, VENI-ST, R-ST, VPR, and VPL
[3] To calculate net figures, a range of 62%-75% was applied to the "Developable 2009 Empl Acres" column.
[4] Includes developed acres, VNE, VENI-LT, R-LT, VEI, VENI-ST, R-ST, VPR, VPL, UC, VU, and Redev to Non-Emp
[5] The areas represent Spheres of Influence, rather than City boundaries.
[6] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.
[7] Vernal pool litigatin in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels in the area.
[8] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for furthe details on their General Plan Update.
[9] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.
[10] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.
[11] Net change reflects the sum of the acres added and absorbed over the period. More acres added than absorbed results in an acreage gain over the period; more acres absorbed than added results in an acreage loss over the period. For further detail on net change, see the Glossary.
x The area is not reflected on a map or summary sheet in this report.
* Employment Land does not include land designated as retail.

2.2. Residential Land Inventory

: ***The 2009 inventory identified 456,740 acres of developable residential land in the Planning Areas.*** Using a combination of factors, such as development proposals, general plan densities and information from jurisdictions, these developable acres could support between 331,378 units and 486,336 units.[2]

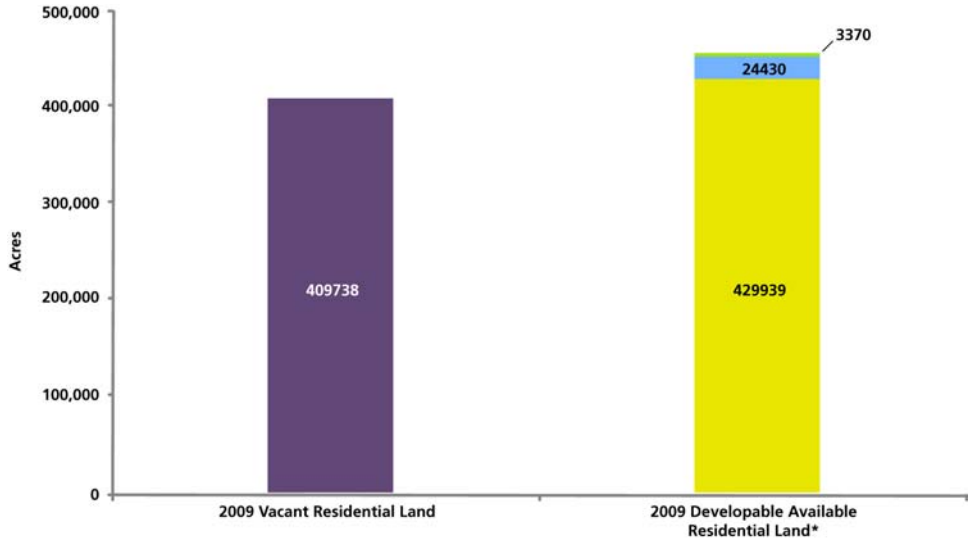
: ***The Planning Areas in the unincorporated County contain 406,582 acres of developable residential land, representing nearly 90 percent of the total inventory.*** However, because of relatively lower planned development densities, the unincorporated Planning Areas could support between 51,520 units and 69,240 units, or one housing unit per 6 to 8 acres. The Planning Areas that make up the incorporated cities contain 50,157 acres that could accommodate between 279,858 units and 417,096 units, or nearly 6 to 8 housing units per acre.

: ***Nearly 60 percent of the inventory of developable land in the unincorporated County is contained in five Planning Areas: Desert (71,017 acres or 17%); Mountain Empire (62,578 acres or 15%); North Mountain (39,639 acres or 10%); Pala-Pauma (35,197 acres or 9%); and Ramona (30,150 acres or 7%).***

: ***The inventory identified 3,370 acres of immediately available residential land (could be developed within one year), nearly 46 percent of this land is located in the unincorporated County and concentrated in five Planning Areas (Bonsall, Jamul-Delzura, Ramona, Fallbrook and Valley Center).*** The remainder of the immediately available residential land (1,806 acres) is located in the incorporated cities' Sphere of Influence. Figure 10 on the following page illustrates the acres in the above statements.

[2] This report used both the SANDAG Series 12 Regional Growth Forecast and the MarketPointe Reality Advisors databases to estimate existing and future housing units. For this reason the unit ranges should not be compared against SANDAG's Series 12 Regional Growth Forecast. Also, the Task Force urges caution when using the estimates of future housing unit numbers shown in the tables. History has shown that many changes affecting land use and markets can influence the number of units. For this reason a wide range is provided, hopefully the range is wide enough. For more details, see the Appendix.

Figure 10
2009 Inventory of Residential Land



** Excludes R-NR*

: ***Using a residential land inventory database provided by MarketPointe Reality Advisors, the study identified 130,016 units in the development pipeline; if completed as proposed these units would absorb an estimated 34,267 acres.*** For units within the pipeline there is a sharp difference in the proposed development densities in the unincorporated and incorporated Planning Areas. As currently proposed, the Planning Areas in the unincorporated County would require 23,262 acres and accommodate 22,763 units, or nearly 1 unit per acre. The Planning Areas that make up the incorporated cities require 11,005 acres to accommodate 107,253 units or 9.8 units per acre. The development pipeline is a parcel level database tracking the progress of residential projects at various stages in the development process. In some cases, the information on the number of units in the pipeline represents the initial estimate by the developers which may or may not be the number of units ultimately constructed.

: ***Of these units in the development pipeline, 7,163 units (5.5%) could be made available in one year or less*** and would absorb 3,370 acres; 63 percent of these units are multifamily.

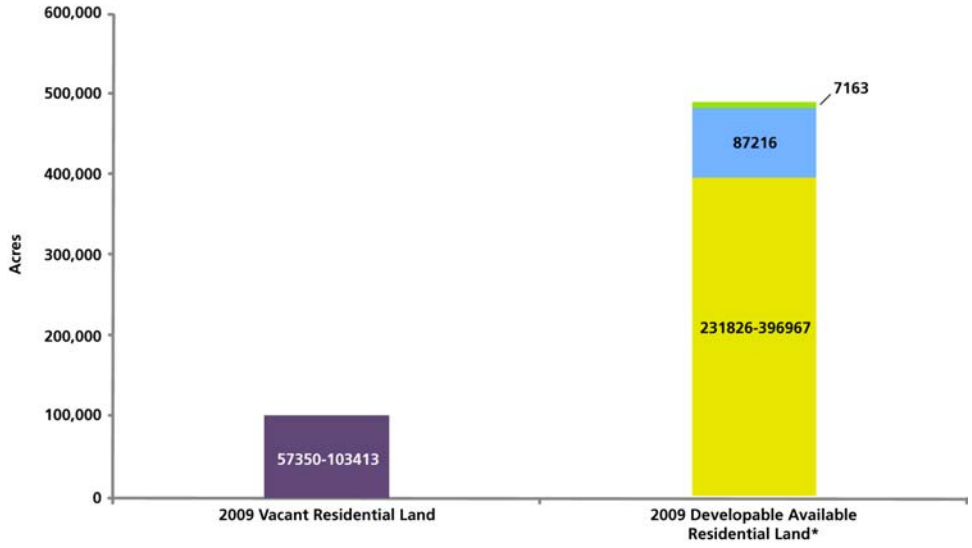
: ***87,216 units (67%) could be made available between one and three years*** and would absorb 23,430 acres; 77 percent of these units are multifamily.

: ***35,637 units (27%) could be made available after three years***, 9,215 are within Master Planned communities, and would absorb 7,466 acres; 54% of these units are multifamily.

: ***The inventory identified 2,480 redevelopment acres that could accommodate between 41,946 units and 54,903 units.*** More than 90 percent of these units are expected to be multifamily and accommodated at between 19 to 25 units per acre.

: ***The inventory identified 3,897 acres of planned mixed use (parcels accommodating both residential and employment) that could accommodate between 56,639 units and 110,104 units with densities between 15 and 28 units per acre; all of these units are expected to be multifamily.***

Figure 11
2009 Inventory of Residential Land (Potential Units)



** Excludes R-NR*

: Table 3
2008–2009 Residential Land Inventory Planning Areas in the San Diego Region
Gross Acres

	Residential Land Gross Acres					Market Status Inventory of Residential Land 2009 Gross Residential Acres by Area																
						Immediately Available				Short-Term Available						Long-Term Available						
						Development Pipeline[5]										Developed [4]				Vacant [4]		Planned Mixed Use[4]	Other[4]
Area Name[6,11]	Vacant 2009 Res Acres [1]	Develop-able 2009 Res Acres [2]	All 2009 Res Acres [3]	Fully Developed 2009 Acres[4]	Total Acres in the Develop-ment Pipeline[5]	ENAS	ENAM	ERAS	ERAM	ENPS	ENPM	ERPS	ERPM	ENAT1[7]	ENAT2[7]	ENPT1[7]	ENPT2[7]	DRS	DRM	DUIS	DUIM	VSF	VMF	PMU	Redev to Non-Res
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)
City of Carlsbad	**504.5**	**1,303.1**	**8,192.7**	**6,887.6**	**687**	**17.8**	**14.4**	**-**	**0.7**	**263.5**	**82.5**	**2.9**	**9.3**	**189.6**	**11.6**	**77.8**	**17.0**	**2.5**	**22.6**	**-**	**23.4**	**484.2**	**20.3**	**63.1**	**2.0**
City of Chula Vista	**1,199.0**	**3,283.8**	**14,385.0**	**11,073.5**	**841**	**41.4**	**5.3**	**-**	**1.7**	**28.5**	**29.0**	**3.5**	**54.9**	**65.7**	**40.9**	**327.4**	**242.7**	**26.9**	**6.8**	**335.6**	**138.9**	**1,029.9**	**169.1**	**735.6**	**27.7**
City of Coronado	**1.8**	**43.3**	**809.3**	**766.1**	**2**	**1.3**	**0.5**	**-**	**0.4**	**-**	**-**	**-**	**0.2**	**-**	**-**	**-**	**-**	**4.5**	**34.5**	**-**	**-**	**1.2**	**0.6**	**-**	**-**
City of Del Mar	**25.2**	**26.7**	**451.6**	**424.9**	**1**	**0.5**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.5**	**-**	**24.7**	**0.5**	**0.5**	**-**
City of El Cajon	**122.7**	**746.4**	**6,166.8**	**5,392.1**	**123**	**10.5**	**1.7**	**0.6**	**12.3**	**18.9**	**3.4**	**8.7**	**65.5**	**-**	**-**	**1.7**	**-**	**17.8**	**111.7**	**192.3**	**106.1**	**115.4**	**7.3**	**72.7**	**28.3**
City of Encinitas	**1,074.0**	**1,532.2**	**7,210.2**	**5,674.2**	**250**	**43.0**	**6.8**	**-**	**0.8**	**186.8**	**-**	**9.0**	**2.1**	**-**	**-**	**-**	**1.4**	**-**	**-**	**107.8**	**35.9**	**1,064.5**	**9.5**	**64.5**	**3.8**
City of Escondido	**8,502.8**	**10,531.5**	**26,477.4**	**15,939.0**	**1,671**	**865.0**	**12.4**	**17.3**	**1.6**	**537.4**	**13.3**	**4.5**	**46.4**	**-**	**-**	**119.8**	**52.9**	**1.2**	**60.2**	**233.0**	**43.1**	**8,495.6**	**7.2**	**20.3**	**6.9**
City of Imperial Beach	**7.6**	**231.2**	**922.6**	**686.6**	**10**	**-**	**0.1**	**-**	**-**	**-**	**4.9**	**0.6**	**4.4**	**-**	**-**	**-**	**-**	**131.2**	**31.4**	**4.3**	**1.0**	**6.6**	**0.9**	**45.8**	**4.8**
City of La Mesa	**91.7**	**267.1**	**3,315.4**	**3,048.4**	**17**	**10.2**	**7.3**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.2**	**0.2**	**85.4**	**6.4**	**157.4**	**-**
City of Lemon Grove	**45.7**	**351.4**	**1,834.4**	**1,459.7**	**17**	**0.9**	**0.2**	**-**	**-**	**15.5**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**1.9**	**2.9**	**234.1**	**28.2**	**42.0**	**3.7**	**21.8**	**23.4**
City of National City	**55.9**	**404.8**	**1,895.2**	**1,480.2**	**56**	**2.9**	**12.2**	**0.7**	**4.5**	**-**	**24.6**	**-**	**11.5**	**-**	**-**	**-**	**-**	**38.3**	**56.4**	**55.8**	**2.6**	**47.2**	**8.7**	**139.4**	**10.2**
City of Oceanside	**883.2**	**1,690.8**	**10,820.7**	**9,121.0**	**546**	**28.2**	**47.4**	**-**	**0.4**	**259.7**	**69.7**	**3.1**	**37.5**	**-**	**1.7**	**93.2**	**4.6**	**0.1**	**1.9**	**191.7**	**52.5**	**780.6**	**102.5**	**15.9**	**8.8**
City of Poway	**6,905.4**	**8,129.4**	**16,890.7**	**8,760.3**	**1,196**	**145.6**	**-**	**-**	**-**	**1,050.5**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.3**	**-**	**9.9**	**-**	**6,903.3**	**2.2**	**17.7**	**1.0**
City of San Diego	**3,205.0**	**12,351.7**	**63,083.3**	**50,610.3**	**2,653**	**108.1**	**46.2**	**0.1**	**5.7**	**153.5**	**407.2**	**1.6**	**387.6**	**80.4**	**-**	**678.8**	**783.7**	**10.3**	**948.5**	**129.9**	**3,119.3**	**2,183.7**	**1,021.3**	**2,285.8**	**121.3**
x 32nd Street Naval Station	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Barrio Logan	1.5	54.8	78.2	20.4	3	-	0.2	-	-	-	2.8	-	-	-	-	-	-	0.4	7.5	-	5.1	-	1.5	37.3	3.0
Black Mountain Ranch	515.6	998.9	1,584.4	585.5	432	2.1	4.2	-	-	-	-	-	-	1.1	-	137.5	287.2	-	-	44.6	-	491.6	24.0	6.5	-
Carmel Mountain Ranch	-	27.1	456.7	429.6	27	-	-	-	-	-	27.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Carmel Valley	63.0	125.5	1,660.7	1,535.2	61	19.3	-	-	-	-	6.9	-	16.5	-	-	6.4	11.8	-	-	-	1.6	62.3	0.7	-	-
Centre City	30.0	181.8	337.2	154.0	50	-	1.6	-	-	-	40.5	-	8.0	-	-	-	-	1.3	49.0	-	-	-	30.0	51.4	1.3
City Heights	34.0	545.9	1,780.7	1,232.5	21	0.4	-	-	-	-	7.9	-	13.1	-	-	-	-	-	288.8	-	33.7	24.9	9.1	168.0	2.3
Clairemont Mesa	84.1	456.1	4,649.9	4,193.9	19	0.5	-	-	-	-	3.0	-	15.1	-	-	-	-	-	-	-	231.3	80.9	3.2	122.1	-
College Area	13.3	212.4	1,279.0	1,066.0	14	-	-	-	-	-	3.7	-	10.1	-	-	-	-	-	59.6	-	71.5	9.1	4.2	54.3	0.6
Del Mar Mesa	158.4	349.1	583.4	234.2	181	-	-	-	-	5.0	-	-	-	-	-	176.5	-	-	-	9.2	-	158.4	-	-	-
x East Elliott	118.0	118.0	118.0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	118.0	-	-	-
Eastern Area	18.2	274.8	1,809.8	1,535.0	16	-	7.5	-	4.1	0.7	-	-	3.9	-	-	-	-	-	34.1	-	27.0	11.6	6.7	179.2	-
Encanto Neighborhoods	171.1	472.9	2,563.7	2,090.8	18	0.5	-	-	-	8.7	1.9	-	7.1	-	-	-	-	3.2	56.2	2.5	204.5	146.7	24.3	17.3	-
x Fairbanks Country Club	-	-	133.1	133.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Flower Hill	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Golden Hill	11.7	110.6	463.8	352.4	4	-	-	-	-	-	2.0	-	2.1	-	-	-	-	-	-	8.5	80.2	3.6	8.1	6.1	0.8
x Harbor	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kearny Mesa	-	33.7	180.1	146.4	19	-	-	-	-	-	6.1	-	-	-	-	-	12.5	-	-	-	-	-	-	15.1	-
Kensington-Talmadge	3.5	129.8	736.7	606.9	4	-	-	-	-	-	-	-	4.5	-	-	-	-	-	52.7	-	34.1	2.8	0.7	35.1	-
La Jolla	84.1	322.7	3,339.5	3,016.8	5	1.5	1.1	-	-	-	-	-	2.3	-	-	-	0.2	-	-	-	156.4	76.2	7.9	77.1	-
Linda Vista	4.8	276.1	1,264.2	988.1	27	-	6.6	-	-	-	12.6	-	8.2	-	-	-	-	-	-	-	168.5	0.6	4.2	75.5	-
x Lindbergh Field	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	-	116.8	218.8	101.9	1	-	-	-	-	-	0.9	-	0.2	-	-	-	-	-	33.6	-	0.2	-	-	81.9	-
Mira Mesa	77.7	403.5	3,008.3	2,604.8	251	-	-	-	-	16.0	152.4	-	40.6	-	-	-	41.8	-	-	-	42.4	9.7	68.0	32.6	-
x Miramar Air Station	141.7	141.7	216.8	75.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	141.7	-	-
x Miramar Ranch North	-	-	545.3	545.3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Mission Bay Park	-	0.5	80.4	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.1	-	-	0.5	79.8
Mission Beach	0.8	96.5	188.1	91.6	0	-	-	-	-	-	-	-	0.3	-	-	-	-	-	-	-	90.3	-	0.8	5.0	-
Mission Valley	2.8	470.2	823.1	352.9	278	-	3.9	-	-	-	16.5	-	33.6	-	-	8.6	215.3	-	-	-	-	-	2.8	189.5	-
Navajo	102.5	310.4	3,470.9	3,160.5	44	2.2	-	-	-	-	17.2	-	24.5	-	-	-	-	0.9	7.7	-	81.8	15.2	87.3	73.7	-
x NCFUA Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NCFUA Subarea 2	119.5	201.2	212.0	10.8	82	-	-	-	-	81.7	-	-	-	-	-	-	-	-	-	-	-	119.5	-	-	-
Normal Heights	3.9	173.3	558.5	385.2	8	-	-	-	-	-	5.0	-	2.7	-	-	-	-	-	17.0	-	105.7	3.7	0.2	38.9	-
North Park	12.6	565.7	1,684.6	1,118.9	18	-	0.4	-	0.8	-	3.6	-	13.2	-	-	-	-	-	143.1	-	263.7	6.7	5.9	128.4	-
Ocean Beach	1.4	190.9	499.5	308.6	2	-	-	-	-	-	-	-	1.9	-	-	-	-	-	-	-	143.3	0.1	1.3	44.3	-
Old San Diego	1.7	7.7	25.6	16.7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2.4	-	1.7	3.6	1.2
Otay Mesa[8,9]	505.1	1,047.7	1,462.5	413.9	168	3.5	-	-	-	-	25.3	-	15.0	-	-	48.9	75.2	-	-	-	4.7	35.8	469.3	369.9	0.9
Otay Mesa-Nestor	17.4	321.0	2,194.8	1,873.4	38	-	-	-	-	8.6	-	1.6	28.0	-	-	-	-	-	-	28.4	197.2	16.9	0.5	39.8	0.3
Pacific Beach	9.0	601.1	1,926.1	1,320.4	7	-	-	-	0.9	-	0.5	-	5.4	-	-	-	-	-	-	-	465.4	5.6	3.4	120.0	4.6
Pacific Highlands Ranch	211.4	576.4	898.3	321.9	327	1.9	-	0.1	-	-	-	-	-	-	-	206.3	119.1	-	-	-	-	187.4	23.9	37.6	-
Peninsula	24.4	185.1	2,070.1	1,885.0	12	1.1	0.2	-	-	-	1.7	-	8.5	-	-	-	-	-	21.9	0.1	88.6	18.1	6.3	38.5	-
Rancho Bernardo	202.9	229.7	2,871.4	2,641.7	27	0.5	-	-	-	-	5.9	-	20.5	-	-	-	-	-	-	-	-	202.9	-	-	-
Rancho Encantada	74.2	218.8	383.0	164.2	145	72.9	-	-	-	-	-	-	-	71.7	-	-	-	-	-	-	-	74.2	-	-	-
Rancho Penasquitos	69.1	177.7	2,632.1	2,454.4	10	-	-	-	-	-	-	-	10.2	-	-	-	-	-	-	-	98.5	61.0	8.1	-	-
x Sabre Springs	-	-	418.8	418.8	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x San Pasqual	0.2	1.5	29.0	27.5	1	1.3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.2	-	-	-

Table 3
2008–2009 Residential Land Inventory Planning Areas in the San Diego Region
Gross Acres (cont'd)

Area Name[6,11]	Residential Land Gross Acres: Vacant 2009 Res Acres [1] (1)	Develop-able 2009 Res Acres [2] (2)	All 2009 Res Acres [3] (3)	Fully Developed 2009 Acres[4] (4)	Total Acres in the Develop-ment Pipeline[5] (5)	Market Status Inventory of Residential Land 2009 Gross Residential Acres by Area: Immediately Available — Development Pipeline[5]: ENAS (6)	ENAM (7)	ERAS (8)	ERAM (9)	Short-Term Available — Development Pipeline[5]: ENPS (10)	ENPM (11)	ERPS (12)	ERPM (13)	ENAT1[7] (14)	ENAT2[7] (15)	Long-Term Available — Development Pipeline[5]: ENPT1[7] (16)	ENPT2[7] (17)	Developed [4]: DRS (18)	DRM (19)	DUIS (20)	DUIM (21)	Vacant [4]: VSF (22)	VMF (23)	Planned Mixed Use[4] (24)	Other[4] Redev to Non-Res (25)
San Ysidro	63.2	264.3	838.4	567.7	11	-	0.2	-	-	-	8.7	-	2.2	-	-	-	-	4.5	121.9	10.6	37.8	45.9	17.3	15.2	6.4
x Scripps Miramar Ranch	3.0	39.4	1,333.5	1,294.1	17	-	-	-	-	10.3	4.0	-	2.4	-	-	-	-	-	-	19.6	-	3.0	-	-	-
x Scripps Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Serra Mesa	2.9	55.4	999.3	943.2	43	-	6.4	-	-	16.5	0.3	-	20.1	-	-	-	-	-	-	-	4.2	2.3	0.6	5.0	0.8
x Skyline-Paradise Hills	40.1	62.5	2,867.4	2,804.8	14	-	-	-	-	3.6	-	-	10.1	-	-	-	-	-	-	5.6	2.8	34.7	5.4	0.3	-
Southeastern San Diego	54.4	218.6	1,315.8	1,078.5	9	0.1	-	-	-	2.3	3.4	-	2.8	-	-	-	-	-	46.8	0.8	77.0	21.7	32.7	31.1	18.7
Tierrasanta	58.4	61.6	1,383.1	1,321.4	3	-	-	-	-	-	3.2	-	-	-	-	-	-	-	-	-	-	58.4	-	-	-
x Tijuana River Valley	-	-	11.0	11.0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Torrey Highlands	46.9	156.0	523.2	367.3	109	-	-	-	-	-	-	-	-	7.6	-	94.6	6.8	-	-	-	-	40.1	6.9	-	-
Torrey Hills	1.7	15.4	253.9	238.5	14	-	-	-	-	-	-	-	-	-	-	-	13.7	-	-	-	-	1.7	-	-	-
x Torrey Pines	11.5	11.5	468.7	457.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	11.5	-	-	-
University	5.6	214.0	1,993.9	1,779.9	89	-	13.3	-	-	-	36.7	-	39.3	-	-	-	-	-	-	-	82.7	4.1	1.4	36.5	-
Uptown	24.1	521.6	1,601.2	1,078.9	24	0.4	0.7	-	-	-	7.3	-	15.1	-	-	-	-	-	8.5	-	316.6	13.2	10.9	148.8	0.7
x Via De La Valle	3.5	3.5	57.0	53.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3.5	-	-	-
City of San Marcos	**3,475.5**	**5,206.3**	**12,106.9**	**6,872.0**	**1,485**	**113.9**	**12.7**	**14.2**	**4.6**	**462.0**	**12.2**	**3.0**	**11.1**	**171.4**	**5.7**	**-**	**673.9**	**66.6**	**23.9**	**110.4**	**3.2**	**3,449.5**	**26.1**	**41.8**	**28.6**
City of Santee	**667.9**	**1,993.1**	**4,768.8**	**2,775.7**	**1,234**	**107.9**	**23.7**	**2.0**	**8.1**	**133.0**	**12.3**	**8.8**	**33.1**	**904.9**	**-**	**-**	**-**	**9.7**	**7.4**	**57.0**	**17.3**	**608.5**	**59.4**	**-**	**-**
City of Solana Beach	**18.6**	**33.6**	**1,201.5**	**1,167.9**	**4**	**1.4**	**-**	**-**	**-**	**-**	**2.3**	**-**	**0.5**	**-**	**-**	**-**	**-**	**-**	**-**	**0.3**	**-**	**16.4**	**2.2**	**10.6**	**-**
City of Vista	**1,273.3**	**2,030.9**	**11,034.9**	**8,938.8**	**212**	**24.0**	**1.4**	**13.5**	**0.7**	**116.1**	**40.1**	**10.5**	**5.8**	**-**	**-**	**-**	**-**	**-**	**1.8**	**469.9**	**26.1**	**1,241.9**	**31.4**	**47.6**	**65.2**
Uncorporated[10]	**381,678.2**	**406,582.4**	**597,947.1**	**190,902.3**	**23,262**	**1,533.7**	**27.9**	**2.1**	**1.3**	**15,881.9**	**1,118.5**	**16.5**	**11.6**	**193.7**	**83.1**	**2,447.9**	**1,943.9**	**10.9**	**-**	**1,393.2**	**82.2**	**381,392.5**	**285.7**	**155.9**	**462.4**
Alpine	9,624.8	10,418.7	22,033.4	11,602.7	626	4.9	3.2	-	-	618.4	-	-	-	-	-	-	-	-	-	130.0	2.3	9,585.9	38.9	35.1	12.1
x Barona	-	-	26.7	26.7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Bonsall	8,405.8	9,992.9	16,253.4	6,257.5	1,587	351.2	-	-	-	952.7	51.8	-	-	-	-	-	231.4	-	-	-	-	8,403.6	2.2	-	3.0
x Central Mountain	13,441.3	13,808.1	19,905.2	6,096.2	351	47.0	-	-	-	303.8	-	-	-	-	-	-	-	-	-	16.1	-	13,441.3	-	-	0.8
x County Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	6,673.9	6,811.2	12,206.1	5,394.2	125	13.9	-	-	-	110.7	-	-	-	-	-	-	-	-	-	12.8	-	6,673.9	-	-	0.7
x Desert	69,153.2	71,017.4	75,991.0	4,934.7	1,834	-	-	-	-	1,834.2	-	-	-	-	-	-	-	-	-	21.8	8.1	69,098.1	55.1	-	38.9
Fallbrook	10,229.7	12,927.8	28,885.8	15,922.5	2,057	193.1	-	-	-	765.2	834.4	-	1.6	-	-	129.7	133.0	-	-	580.5	0.9	10,224.6	5.1	59.6	35.4
Jamul-Dulzura	25,690.1	27,932.9	41,850.0	13,901.9	2,233	256.2	-	-	-	949.4	-	-	-	-	-	1,027.5	-	-	-	9.7	-	25,690.1	-	-	15.2
x Julian	9,793.3	10,487.1	15,612.3	5,119.5	689	-	-	-	-	688.6	-	-	-	-	-	-	-	-	-	5.2	-	9,792.5	0.8	-	5.8
Lakeside	9,974.4	11,290.9	22,911.8	11,561.3	1,049	37.8	-	-	-	980.0	8.8	16.3	5.8	-	-	-	-	10.9	-	224.7	32.2	9,951.1	23.3	-	59.5
x Mountain Empire	60,123.3	62,577.8	81,936.3	19,311.5	2,445	58.7	-	-	-	1,556.9	-	-	-	-	-	-	829.0	-	-	1.8	8.2	60,123.3	-	-	47.0
North County Metro	13,328.4	15,544.2	19,062.4	3,470.4	2,183	73.4	19.0	-	-	289.6	-	-	-	-	-	1,103.3	697.1	-	-	33.2	-	13,328.4	-	-	47.8
x North Mountain	39,638.5	39,639.1	50,284.0	10,641.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.6	-	39,624.1	14.4	-	3.5
Otay[12]	835.4	859.5	859.5	-	24	-	-	-	-	-	-	-	-	-	-	-	24.1	-	-	-	-	731.0	104.5	-	-
Pala-Pauma	34,162.3	35,196.8	41,299.3	6,080.6	1,028	23.8	-	-	-	1,004.7	-	-	-	-	-	-	-	-	-	6.1	-	34,162.3	-	-	21.9
x Pendleton-De Luz	11,282.6	11,282.6	16,319.7	5,037.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	11,282.6	-	-	-
x Rainbow	5,632.6	5,632.6	8,234.0	2,596.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,632.6	-	-	5.2
Ramona	26,688.9	30,150.2	52,043.8	21,841.2	3,341	194.3	-	-	-	3,147.1	-	-	-	-	-	-	-	-	-	109.3	10.6	26,674.5	14.4	-	52.4
San Dieguito	5,909.3	7,309.2	18,153.9	10,844.0	1,392	112.3	-	1.8	-	888.8	2.2	0.1	-	193.7	5.9	187.4	-	-	-	2.1	-	5,909.1	0.2	5.6	0.7
Spring Valley	405.9	580.6	3,985.6	3,377.6	79	0.2	5.7	-	1.3	46.5	21.3	-	3.6	-	-	-	-	-	-	94.4	1.7	384.6	21.3	-	27.3
x Sweetwater	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Valle De Oro	687.9	899.7	7,365.7	6,461.8	80	19.2	-	0.3	-	30.6	0.3	-	0.6	-	-	-	29.3	-	-	113.2	18.2	682.5	5.4	-	4.1
Valley Center	19,996.6	22,223.2	42,727.2	20,423.2	2,139	147.8	-	-	-	1,714.8	199.7	-	-	-	77.2	-	-	-	-	31.6	-	19,996.6	-	55.5	80.9
Regional Total	409,738	456,740	789,515	331,981	34,267	3,056	220	51	43	19,107	1,820	73	681	1,606	143	3,746	3,720	322	1,310	3,526	3,680	407,973	1,765	3,897	794

[1] Includes VSF, VMF.

[2] Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, and VMF, and PMU.

[3] Includes Fully Developed Acres, ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, VMF, PMU, and Redev to Non-Res.

[4] Data in these columns are from SANDAG's Series 12 Regional Growth Forecast update, which reflects January 1, 2008. All Series 12 inputs received by SANDAG before June 25, 2009 are incorporated into this report.

[5] Data in these columns were obtained from MarketPointe Realty Advisors' LandTracker information for 4Q 2008. Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, and ENPT2. In some cases, the information on the number of units in the pipeline represents the initial estimate by the developers which may or may not be the number of units ultimately constructed.

[6] The areas represent Spheres of Influence, rather than City boundaries.

[7] Where possible, information about the types of units planned for Master Planned Communities are reflected in the appropriate column (single- or multi-family). If a Master Planned Community is planned to include both single- and multi-family units, the acreage may not be reflected in the same category if the parcels have not been subdivided.

[8] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.

[9] Vernal pool litigatin in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels in the area.

[10] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for furthe details on their General Plan Update.

[11] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.

[12] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.

x The area is not reflected on a map or summary sheet in this report.

Table 4
2008–2009 Residential Land Inventory Planning Areas in the San Diego Region
Percent of Gross Acres

Area Name[6,11]	Residential Land Gross Acres: Vacant 2009 Res Acres[1] (1)	Develop-able 2009 Res Acres[2] (2)	All 2009 Res Acres[3] (3)	Fully Developed 2009 Acres[4] (4)	Total Acres in the Develop-ment Pipeline[5] (5)	Market Status Inventory of Residential Land, Percent of Regional Totals by Code and Area: Immediately Available — Development Pipeline[5] ENAS (5)	ENAM (6)	ERAS (7)	ERAM (8)	Short-Term Available — Development Pipeline[5] ENPS (9)	ENPM (10)	ERPS (11)	ERPM (12)	ENAT17 (13)	ENAT27 (14)	Long-Term Available — Development Pipeline[5] ENPT17 (15)	ENPT27 (16)	Developed[4] DRS (17)	DRM (18)	DUIS (19)	DUIM (20)	Vacant[4] VSF (21)	VMF (22)	Planned Mixed Use[4] PMU (23)	Other[4] Redev to Non-Res (24)
City of Carlsbad	**504.5**	**1,303.1**	**8,192.7**	**6,887.6**	**687**	**0.6%**	**6.5%**	**-**	**1.7%**	**1.4%**	**4.5%**	**4.0%**	**1.4%**	**11.8%**	**8.1%**	**2.1%**	**0.5%**	**0.8%**	**1.7%**	**-**	**0.6%**	**0.1%**	**1.1%**	**1.6%**	**0.3%**
City of Chula Vista	**1,199.0**	**3,283.8**	**14,385.0**	**11,073.5**	**841**	**1.4%**	**2.4%**	**-**	**3.9%**	**0.1%**	**1.6%**	**4.8%**	**8.1%**	**4.1%**	**28.6%**	**8.7%**	**6.5%**	**8.3%**	**0.5%**	**9.5%**	**3.8%**	**0.3%**	**9.6%**	**18.9%**	**3.5%**
City of Coronado	**1.8**	**43.3**	**809.3**	**766.1**	**2**	**0.0%**	**0.2%**	**-**	**0.9%**	**-**	**-**	**-**	**0.0%**	**-**	**-**	**-**	**-**	**1.4%**	**2.6%**	**-**	**-**	**0.0%**	**0.0%**	**-**	**-**
City of Del Mar	**25.2**	**26.7**	**451.6**	**424.9**	**1**	**0.0%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.0%**	**-**	**0.0%**	**0.0%**	**0.0%**	**-**
City of El Cajon	**122.7**	**746.4**	**6,166.8**	**5,392.1**	**123**	**0.3%**	**0.8%**	**1.2%**	**28.5%**	**0.1%**	**0.2%**	**12.0%**	**9.6%**	**-**	**-**	**0.0%**	**-**	**5.5%**	**8.5%**	**5.5%**	**2.9%**	**0.0%**	**0.4%**	**1.9%**	**3.6%**
City of Encinitas	**1,074.0**	**1,532.2**	**7,210.2**	**5,674.2**	**250**	**1.4%**	**3.1%**	**-**	**1.9%**	**1.0%**	**-**	**12.4%**	**0.3%**	**-**	**-**	**-**	**0.0%**	**-**	**-**	**3.1%**	**1.0%**	**0.3%**	**0.5%**	**1.7%**	**0.5%**
City of Escondido	**8,502.8**	**10,531.5**	**26,477.4**	**15,939.0**	**1,671**	**28.3%**	**5.6%**	**34.2%**	**3.8%**	**2.8%**	**0.7%**	**6.2%**	**6.8%**	**-**	**-**	**3.2%**	**1.4%**	**0.4%**	**4.6%**	**6.6%**	**1.2%**	**2.1%**	**0.4%**	**0.5%**	**0.9%**
City of Imperial Beach	**7.6**	**231.2**	**922.6**	**686.6**	**10**	**0.0%**	**0.0%**	**-**	**-**	**-**	**0.3%**	**0.8%**	**0.6%**	**-**	**-**	**-**	**-**	**40.7%**	**2.4%**	**0.1%**	**0.0%**	**0.0%**	**0.1%**	**1.2%**	**0.6%**
City of La Mesa	**91.7**	**267.1**	**3,315.4**	**3,048.4**	**17**	**0.3%**	**3.3%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.0%**	**0.0%**	**0.0%**	**0.4%**	**4.0%**	**-**
City of Lemon Grove	**45.7**	**351.4**	**1,834.4**	**1,459.7**	**17**	**0.0%**	**0.1%**	**-**	**-**	**0.1%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.6%**	**0.2%**	**6.6%**	**0.8%**	**0.0%**	**0.2%**	**0.6%**	**2.9%**
City of National City	**55.9**	**404.8**	**1,895.2**	**1,480.2**	**56**	**0.1%**	**5.5%**	**1.5%**	**10.5%**	**-**	**1.3%**	**-**	**1.7%**	**-**	**-**	**-**	**-**	**11.9%**	**4.3%**	**1.6%**	**0.1%**	**0.0%**	**0.5%**	**3.6%**	**1.3%**
City of Oceanside	**883.2**	**1,690.8**	**10,820.7**	**9,121.0**	**546**	**0.9%**	**21.5%**	**-**	**1.0%**	**1.4%**	**3.8%**	**4.3%**	**5.5%**	**-**	**1.2%**	**2.5%**	**0.1%**	**0.0%**	**0.1%**	**5.4%**	**1.4%**	**0.2%**	**5.8%**	**0.4%**	**1.1%**
City of Poway	**6,905.4**	**8,129.4**	**16,890.7**	**8,760.3**	**1,196**	**4.8%**	**-**	**-**	**-**	**5.5%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0.1%**	**-**	**0.3%**	**-**	**1.7%**	**0.1%**	**0.5%**	**0.1%**
City of San Diego	**3,205.0**	**12,351.7**	**63,083.3**	**50,610.3**	**2,653**	**3.5%**	**21.0%**	**0.3%**	**13.3%**	**0.8%**	**22.4%**	**2.2%**	**56.9%**	**5.0%**	**-**	**18.1%**	**21.1%**	**3.2%**	**72.4%**	**3.7%**	**84.8%**	**0.5%**	**57.9%**	**58.7%**	**15.3%**
x 32nd Street Naval Station	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Barrio Logan	1.5	54.8	78.2	20.4	3	-	0.1%	-	-	-	0.2%	-	-	-	-	-	-	0.1%	0.6%	-	0.1%	-	0.1%	1.0%	0.4%
Black Mountain Ranch	515.6	998.9	1,584.4	585.5	432	0.1%	1.9%	-	-	-	-	-	-	0.1%	-	3.7%	7.7%	-	-	1.3%	-	0.1%	1.4%	0.2%	-
Carmel Mountain Ranch	-	27.1	456.7	429.6	27	-	-	-	-	-	1.5%	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Carmel Valley	63.0	125.5	1,660.7	1,535.2	61	0.6%	-	-	-	-	0.4%	-	2.4%	-	-	0.2%	0.3%	-	-	-	0.0%	0.0%	0.0%	-	-
Centre City	30.0	181.8	337.2	154.0	50	-	0.7%	-	-	-	2.2%	-	1.2%	-	-	-	-	0.4%	3.7%	-	-	-	1.7%	1.3%	0.2%
City Heights	34.0	545.9	1,780.7	1,232.5	21	0.0%	-	-	-	-	0.4%	-	1.9%	-	-	-	-	-	22.0%	-	0.9%	0.0%	0.5%	4.3%	0.3%
Clairemont Mesa	84.1	456.1	4,649.9	4,193.9	19	0.0%	-	-	-	-	0.2%	-	2.2%	-	-	-	-	-	-	-	6.3%	0.0%	0.2%	3.1%	-
College Area	13.3	212.4	1,279.0	1,066.0	14	-	-	-	-	-	0.2%	-	1.5%	-	-	-	-	-	4.5%	-	1.9%	0.0%	0.2%	1.4%	0.1%
Del Mar Mesa	158.4	349.1	583.4	234.2	181	-	-	-	-	0.0%	-	-	-	-	-	4.7%	-	-	-	0.3%	-	0.0%	-	-	-
x East Elliott	118.0	118.0	118.0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	-
Eastern Area	18.2	274.8	1,809.8	1,535.0	16	-	3.4%	-	9.5%	0.0%	-	-	0.6%	-	-	-	-	-	2.6%	-	0.7%	0.0%	0.4%	4.6%	-
Encanto Neighborhoods	171.1	472.9	2,563.7	2,090.8	18	0.0%	-	-	-	0.0%	0.1%	-	1.0%	-	-	-	-	1.0%	4.3%	0.1%	5.6%	0.0%	1.4%	0.4%	-
x Fairbanks Country Club	-	-	133.1	133.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Flower Hill	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Golden Hill	11.7	110.6	463.8	352.4	4	-	-	-	-	-	0.1%	-	0.3%	-	-	-	-	-	-	0.2%	2.2%	0.0%	0.5%	0.2%	0.1%
x Harbor	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kearny Mesa	-	33.7	180.1	146.4	19	-	-	-	-	-	0.3%	-	-	-	-	-	0.3%	-	-	-	-	-	-	0.4%	-
Kensington-Talmadge	3.5	129.8	736.7	606.9	4	-	-	-	-	-	-	-	0.7%	-	-	-	-	-	4.0%	-	0.9%	0.0%	0.0%	0.9%	-
La Jolla	84.1	322.7	3,339.5	3,016.8	5	0.0%	0.5%	-	-	-	-	-	0.3%	-	-	-	0.0%	-	-	-	4.3%	0.0%	0.5%	2.0%	-
Linda Vista	4.8	276.1	1,264.2	988.1	27	-	3.0%	-	-	-	0.7%	-	1.2%	-	-	-	-	-	-	-	4.6%	0.0%	0.2%	1.9%	-
x Lindbergh Field	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	-	116.8	218.8	101.9	1	-	-	-	-	-	0.1%	-	0.0%	-	-	-	-	-	2.6%	-	0.0%	-	-	2.1%	-
Mira Mesa	77.7	403.5	3,008.3	2,604.8	251	-	-	-	-	0.1%	8.4%	-	6.0%	-	-	-	1.1%	-	-	-	1.2%	0.0%	3.9%	0.8%	-
x Miramar Air Station	141.7	141.7	216.8	75.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	8.0%	-	-
x Miramar Ranch North	-	-	545.3	545.3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Mission Bay Park	-	0.5	80.4	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	0.0%	10.0%
Mission Beach	0.8	96.5	188.1	91.6	0	-	-	-	-	-	-	-	0.0%	-	-	-	-	-	-	-	2.5%	-	0.0%	0.1%	-
Mission Valley	2.8	470.2	823.1	352.9	278	-	1.8%	-	-	-	0.9%	-	4.9%	-	-	0.2%	5.8%	-	-	-	-	-	0.2%	4.9%	-
Navajo	102.5	310.4	3,470.9	3,160.5	44	0.1%	-	-	-	-	0.9%	-	3.6%	-	-	-	-	0.3%	0.6%	-	2.2%	0.0%	4.9%	1.9%	-
x NCFUA Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NCFUA Subarea 2	119.5	201.2	212.0	10.8	82	-	-	-	-	0.4%	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	-
Normal Heights	3.9	173.3	558.5	385.2	8	-	-	-	-	-	0.3%	-	0.4%	-	-	-	-	-	1.3%	-	2.9%	0.0%	0.0%	1.0%	-
North Park	12.6	565.7	1,684.6	1,118.9	18	-	0.2%	-	1.8%	-	0.2%	-	1.9%	-	-	-	-	-	10.9%	-	7.2%	0.0%	0.3%	3.3%	-
Ocean Beach	1.4	190.9	499.5	308.6	2	-	-	-	-	-	-	-	0.3%	-	-	-	-	-	-	-	3.9%	0.0%	0.1%	1.1%	-
Old San Diego	1.7	7.7	25.6	16.7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.1%	-	0.1%	0.1%	0.1%
Otay Mesa[8,9]	505.1	1,047.7	1,462.5	413.9	168	0.1%	-	-	-	-	1.4%	-	2.2%	-	-	1.3%	2.0%	-	-	-	0.1%	0.0%	26.6%	9.5%	0.1%
Otay Mesa-Nestor	17.4	321.0	2,194.8	1,873.4	38	-	-	-	-	0.0%	-	2.2%	4.1%	-	-	-	-	-	-	0.8%	5.4%	0.0%	0.0%	1.0%	0.0%
Pacific Beach	9.0	601.1	1,926.1	1,320.4	7	-	-	-	2.0%	-	0.0%	-	0.8%	-	-	-	-	-	-	-	12.6%	0.0%	0.2%	3.1%	0.6%
Pacific Highlands Ranch	211.4	576.4	898.3	321.9	327	0.1%	-	0.3%	-	-	-	-	-	-	-	5.5%	3.2%	-	-	-	-	0.0%	1.4%	1.0%	-
Peninsula	24.4	185.1	2,070.1	1,885.0	12	0.0%	0.1%	-	-	-	0.1%	-	1.3%	-	-	-	-	-	1.7%	0.0%	2.4%	0.0%	0.4%	1.0%	-
Rancho Bernardo	202.9	229.7	2,871.4	2,641.7	27	0.0%	-	-	-	-	0.3%	-	3.0%	-	-	-	-	-	-	-	-	0.0%	-	-	-
Rancho Encantada	74.2	218.8	383.0	164.2	145	2.4%	-	-	-	-	-	-	-	4.5%	-	-	-	-	-	-	-	0.0%	-	-	-
Rancho Penasquitos	69.1	177.7	2,632.1	2,454.4	10	-	-	-	-	-	-	-	1.5%	-	-	-	-	-	-	-	2.7%	0.0%	0.5%	-	-

Table 4
2008–2009 Residential Land Inventory Planning Areas in the San Diego Region
Percent of Gross Acres (cont'd)

Area Name[6,11]	Residential Land Gross Acres: Vacant 2009 Res Acres [1] (1)	Develop-able 2009 Res Acres [2] (2)	All 2009 Res Acres [3] (3)	Fully Developed 2009 Acres[4] (4)	Total Acres in the Develop-ment Pipeline[5] (5)	Market Status Inventory of Residential Land, Percent of Regional Totals by Code and Area: Immediately Available — Development Pipeline[5] ENAS (5)	ENAM (6)	ERAS (7)	ERAM (8)	Short-Term Available — Development Pipeline[5] ENPS (9)	ENPM (10)	ERPS (11)	ERPM (12)	ENAT17 (13)	ENAT27 (14)	Long-Term Available — Development Pipeline[5] ENPT17 (15)	ENPT27 (16)	Developed [4] DRS (17)	DRM (18)	DUIS (19)	DUIM (20)	Vacant [4] VSF (21)	VMF (22)	Planned Mixed Use[4] PMU (23)	Other[4] Redev to Non-Res (24)
x Sabre Springs	-	-	418.8	418.8	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x San Pasqual	0.2	1.5	29.0	27.5	1	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	-
San Ysidro	63.2	264.3	838.4	567.7	11	-	0.1%	-	-	-	0.5%	-	0.3%	-	-	-	-	1.4%	9.3%	0.3%	1.0%	0.0%	1.0%	0.4%	0.8%
x Scripps Miramar Ranch	3.0	39.4	1,333.5	1,294.1	17	-	-	-	-	0.1%	0.2%	-	0.4%	-	-	-	-	-	-	0.6%	-	0.0%	-	-	-
x Scripps Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Serra Mesa	2.9	55.4	999.3	943.2	43	-	2.9%	-	-	0.1%	0.0%	-	2.9%	-	-	-	-	-	-	-	0.1%	0.0%	0.0%	0.1%	0.1%
x Skyline-Paradise Hills	40.1	62.5	2,867.4	2,804.8	14	-	-	-	-	0.0%	-	-	1.5%	-	-	-	-	-	-	0.2%	0.1%	0.0%	0.3%	0.0%	-
Southeastern San Diego	54.4	218.6	1,315.8	1,078.5	9	0.0%	-	-	-	0.0%	0.2%	-	0.4%	-	-	-	-	-	3.6%	0.0%	2.1%	0.0%	1.9%	0.8%	2.3%
Tierrasanta	58.4	61.6	1,383.1	1,321.4	3	-	-	-	-	-	0.2%	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	-
x Tijuana River Valley	-	-	11.0	11.0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Torrey Highlands	46.9	156.0	523.2	367.3	109	-	-	-	-	-	-	-	-	0.5%	-	2.5%	0.2%	-	-	-	-	0.0%	0.4%	-	-
Torrey Hills	1.7	15.4	253.9	238.5	14	-	-	-	-	-	-	-	-	-	-	-	0.4%	-	-	-	-	0.0%	-	-	-
x Torrey Pines	11.5	11.5	468.7	457.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	-
University	5.6	214.0	1,993.9	1,779.9	89	-	6.0%	-	-	-	2.0%	-	5.8%	-	-	-	-	-	-	-	2.2%	0.0%	0.1%	0.9%	-
Uptown	24.1	521.6	1,601.2	1,078.9	24	0.0%	0.3%	-	-	-	0.4%	-	2.2%	-	-	-	-	-	0.7%	-	8.6%	0.0%	0.6%	3.8%	0.1%
x Via De La Valle	3.5	3.5	57.0	53.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	-	-
City of San Marcos	**3,475.5**	**5,206.3**	**12,106.9**	**6,872.0**	**1,485**	**3.7%**	**5.8%**	**28.1%**	**10.8%**	**2.4%**	**0.7%**	**4.1%**	**1.6%**	**10.7%**	**4.0%**	**-**	**18.1%**	**20.7%**	**1.8%**	**3.1%**	**0.1%**	**0.8%**	**1.5%**	**1.1%**	**3.6%**
City of Santee	**667.9**	**1,993.1**	**4,768.8**	**2,775.7**	**1,234**	**3.5%**	**10.8%**	**4.0%**	**18.9%**	**0.7%**	**0.7%**	**12.1%**	**4.9%**	**56.4%**	**-**	**-**	**-**	**3.0%**	**0.6%**	**1.6%**	**0.5%**	**0.1%**	**3.4%**	**-**	**-**
City of Solana Beach	**18.6**	**33.6**	**1,201.5**	**1,167.9**	**4**	**0.0%**	**-**	**-**	**-**	**-**	**0.1%**	**-**	**0.1%**	**-**	**-**	**-**	**-**	**-**	**-**	**0.0%**	**-**	**0.0%**	**0.1%**	**0.3%**	**-**
City of Vista	**1,273.3**	**2,030.9**	**11,034.9**	**8,938.8**	**212**	**0.8%**	**0.7%**	**26.7%**	**1.7%**	**0.6%**	**2.2%**	**14.5%**	**0.8%**	**-**	**-**	**-**	**-**	**-**	**0.1%**	**13.3%**	**0.7%**	**0.3%**	**1.8%**	**1.2%**	**8.2%**
Uncorporated[10]	**381,678.2**	**406,582.4**	**597,947.1**	**190,902.3**	**23,262**	**50.2%**	**12.7%**	**4.1%**	**3.1%**	**83.1%**	**61.5%**	**22.7%**	**1.7%**	**12.1%**	**58.1%**	**65.3%**	**52.3%**	**3.4%**	**-**	**39.5%**	**2.2%**	**93.5%**	**16.2%**	**4.0%**	**58.2%**
Alpine	9,624.8	10,418.7	22,033.4	11,602.7	626	0.2%	1.4%	-	-	3.2%	-	-	-	-	-	-	-	-	-	3.7%	0.1%	2.3%	2.2%	0.9%	1.5%
x Barona	-	-	26.7	26.7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Bonsall	8,405.8	9,992.9	16,253.4	6,257.5	1,587	11.5%	-	-	-	5.0%	2.8%	-	-	-	-	-	6.2%	-	-	-	-	2.1%	0.1%	-	0.4%
x Central Mountain	13,441.3	13,808.1	19,905.2	6,096.2	351	1.5%	-	-	-	1.6%	-	-	-	-	-	-	-	-	-	0.5%	-	3.3%	-	-	0.1%
x County Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	6,673.9	6,811.2	12,206.1	5,394.2	125	0.5%	-	-	-	0.6%	-	-	-	-	-	-	-	-	-	0.4%	-	1.6%	-	-	0.1%
x Desert	69,153.2	71,017.4	75,991.0	4,934.7	1,834	-	-	-	-	9.6%	-	-	-	-	-	-	-	-	-	0.6%	0.2%	16.9%	3.1%	-	4.9%
Fallbrook	10,229.7	12,927.8	28,885.8	15,922.5	2,057	6.3%	-	-	-	4.0%	45.8%	-	0.2%	-	-	3.5%	3.6%	-	-	16.5%	0.0%	2.5%	0.3%	1.5%	4.5%
Jamul-Dulzura	25,690.1	27,932.9	41,850.0	13,901.9	2,233	8.4%	-	-	-	5.0%	-	-	-	-	-	27.4%	-	-	-	0.3%	-	6.3%	-	-	1.9%
x Julian	9,793.3	10,487.1	15,612.3	5,119.5	689	-	-	-	-	3.6%	-	-	-	-	-	-	-	-	-	0.1%	-	2.4%	0.0%	-	0.7%
Lakeside	9,974.4	11,290.9	22,911.8	11,561.3	1,049	1.2%	-	-	-	5.1%	0.5%	22.5%	0.9%	-	-	-	-	3.4%	-	6.4%	0.9%	2.4%	1.3%	-	7.5%
x Mountain Empire	60,123.3	62,577.8	81,936.3	19,311.5	2,445	1.9%	-	-	-	8.1%	-	-	-	-	-	-	22.3%	-	-	0.1%	0.2%	14.7%	-	-	5.9%
North County Metro	13,328.4	15,544.2	19,062.4	3,470.4	2,183	2.4%	8.6%	-	-	1.5%	-	-	-	-	-	29.5%	18.7%	-	-	0.9%	-	3.3%	-	-	6.0%
x North Mountain	39,638.5	39,639.1	50,284.0	10,641.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	9.7%	0.8%	-	0.4%
Otay[12]	835.4	859.5	859.5	-	24	-	-	-	-	-	-	-	-	-	-	-	0.6%	-	-	-	-	0.2%	5.9%	-	-
Pala-Pauma	34,162.3	35,196.8	41,299.3	6,080.6	1,028	0.8%	-	-	-	5.3%	-	-	-	-	-	-	-	-	-	0.2%	-	8.4%	-	-	2.8%
x Pendleton-De Luz	11,282.6	11,282.6	16,319.7	5,037.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2.8%	-	-	-
x Rainbow	5,632.6	5,632.6	8,234.0	2,596.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1.4%	-	-	0.7%
Ramona	26,688.9	30,150.2	52,043.8	21,841.2	3,341	6.4%	-	-	-	16.5%	-	-	-	-	-	-	-	-	-	3.1%	0.3%	6.5%	0.8%	-	6.6%
San Dieguito	5,909.3	7,309.2	18,153.9	10,844.0	1,392	3.7%	-	3.5%	-	4.7%	0.1%	0.2%	-	12.1%	4.2%	5.0%	-	-	-	0.1%	-	1.4%	0.0%	0.1%	0.1%
Spring Valley	405.9	580.6	3,985.6	3,377.6	79	0.0%	2.6%	-	3.1%	0.2%	1.2%	-	0.5%	-	-	-	-	-	-	2.7%	0.0%	0.1%	1.2%	-	3.4%
x Sweetwater	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Valle De Oro	687.9	899.7	7,365.7	6,461.8	80	0.6%	-	0.6%	-	0.2%	0.0%	-	0.1%	-	-	-	0.8%	-	-	3.2%	0.5%	0.2%	0.3%	-	0.5%
Valley Center	19,996.6	22,223.2	42,727.2	20,423.2	2,139	4.8%	-	-	-	9.0%	11.0%	-	-	-	53.9%	-	-	-	-	0.9%	-	4.9%	-	1.4%	10.2%
Regional Total	409,738	456,740	789,515	331,981	34,267	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

[1] Includes VSF, VMF.

[2] Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, and VMF, and PMU.

[3] Includes Developed Acres, ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, VMF, PMU, and Redev to Non-Res.

[4] Data in these columns are from SANDAG's Series 12 Regional Growth Forecast update, which reflects January 1, 2008. All Series 12 inputs received by SANDAG before June 25, 2009 are incorporated into this report.

[5] Data in these columns were obtained from MarketPointe Realty Advisors' LandTracker information for 4Q 2008. Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, and ENPT2. In some cases, the information on the number of units in the pipeline represents the initial estimate by the developers which may or may not be the number of units ultimately constructed.

[6] The areas represent Spheres of Influence, rather than City boundaries.

[7] Where possible, information about the types of units planned for Master Planned Communities are reflected in the appropriate column (single- or multi-family). If a Master Planned Community is planned to include both single- and multi-family units, the acreage may not be reflected in the same category if the parcels have not been subdivided.

[8] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.

[9] Vernal pool litigatin in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels in the area.

[10] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for furthe details on their General Plan Update.

[11] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.

[12] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.

x The area is not reflected on a map or summary sheet in this report.

Table 5
2008–2009 Residential Land Inventory Planning Areas in the San Diego Region
Units

	Residential Land Units					Market Status Inventory of Residential Land 2009 Residential Units by Area																	
						Immediately Available				Short-Term Available						Long-Term Available							Other[4]
						Development Pipeline[5]										Developed[4]				Vacant[4]		Planned Mixed Use[4]	
Area Name[6,11]	Potential Units on Vacant 2009 Res Acres[1]	Potential Units on Developable 2009 Res Acres[2]	Existing & Potential Units on All 2009 Res Acres[3]	Existing Units on Fully Developed 2009 Acres[4]	Total Units in the Develop-ment Pipeline[5]	ENAS	ENAM	ERAS	ERAM	ENPS	ENPM	ERPS	ERPM	ENAT1[7]	ENAT2[7]	ENPT1[7]	ENPT2[7]	DRS	DRM	DUIS	DUIM	VSF	VMF	PMU	Redev to Non-Res
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)
City of Carlsbad	**2261-2265**	**6042-7900**	**48970-50828**	**42,903**	**3,257**	**39**	**134**	**-**	**-**	**680**	**564**	**5**	**59**	**810**	**133**	**791**	**42**	**9-55**	**60-297**	**-**	**267-267**	**1956-1956**	**305-309**	**188-1759**	**25**
City of Chula Vista	**5599-8388**	**34148-38685**	**107353-111890**	**73,205**	**15,933**	**183**	**61**	**-**	**24**	**178**	**5,752**	**10**	**834**	**296**	**735**	**4,064**	**3,796**	**27-122**	**107-163**	**511-999**	**3392-4092**	**1743-3914**	**3856-4474**	**8579-8988**	**444**
City of Coronado	**7-20**	**444-1095**	**8970-9621**	**8,526**	**42**	**7**	**13**	**-**	**10**	**-**	**12**	**-**	**-**	**-**	**-**	**-**	**-**	**37-110**	**358-923**	**-**	**-**	**2-7**	**5-13**	**-**	**-**
City of Del Mar	**7-42**	**13-50**	**2539-2576**	**2,526**	**4**	**4**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**2-4**	**-**	**5-38**	**2-4**	**-**	**-**
City of El Cajon	**497-887**	**7932-12759**	**43570-48397**	**35,317**	**2,180**	**17**	**69**	**10**	**226**	**86**	**106**	**75**	**1,575**	**-**	**-**	**16**	**-**	**310-548**	**2598-4422**	**199-1167**	**1853-3080**	**375-719**	**122-168**	**295-475**	**321**
City of Encinitas	**451-1035**	**2340-3484**	**26463-27607**	**24,062**	**516**	**88**	**48**	**-**	**-**	**285**	**-**	**31**	**17**	**-**	**-**	**-**	**47**	**-**	**-**	**239-388**	**380-492**	**396-960**	**55-75**	**754-1053**	**61**
City of Escondido	**2180-5244**	**8432-12818**	**59987-64373**	**51,545**	**3,487**	**370**	**67**	**54**	**-**	**853**	**737**	**10**	**789**	**-**	**-**	**607**	**-**	**14-27**	**878-1490**	**572-1022**	**398-645**	**2116-5136**	**64-108**	**903-903**	**10**
City of Imperial Beach	**47-72**	**2988-4548**	**9957-11517**	**6,808**	**410**	**-**	**2**	**-**	**-**	**-**	**287**	**6**	**115**	**-**	**-**	**-**	**-**	**931-1566**	**320-575**	**45-58**	**19-27**	**36-55**	**11-17**	**1216-1840**	**161**
City of La Mesa	**302-473**	**3926-6599**	**27953-30626**	**24,027**	**52**	**51**	**1**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**3-4**	**4-5**	**226-354**	**76-119**	**3565-6065**	**-**
City of Lemon Grove	**124-298**	**1422-2596**	**9790-10964**	**7,980**	**87**	**6**	**2**	**-**	**-**	**79**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**10-22**	**35-78**	**605-1299**	**176-420**	**81-203**	**43-95**	**385-392**	**388**
City of National City	**167-388**	**5243-10408**	**18866-24031**	**13,465**	**4,229**	**30**	**587**	**5**	**137**	**-**	**3,402**	**-**	**68**	**-**	**-**	**-**	**-**	**172-329**	**346-1076**	**239-414**	**17-48**	**127-271**	**40-117**	**73-3924**	**158**
City of Oceanside	**2466-4766**	**7019-10624**	**69550-73155**	**62,402**	**2,541**	**76**	**666**	**-**	**-**	**361**	**1,010**	**10**	**-**	**-**	**68**	**269**	**81**	**3-4**	**49-70**	**541-1127**	**983-1470**	**1031-2666**	**1435-2100**	**436-646**	**129**
City of Poway	**503-1914**	**1032-2632**	**17356-18956**	**16,323**	**178**	**58**	**-**	**-**	**-**	**120**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**11-23**	**-**	**503-1913**	**0-1**	**340-517**	**1**
City of San Diego	**16003-32095**	**79901-277710**	**559770-657579**	**378,391**	**64,793**	**347**	**1,297**	**-**	**115**	**875**	**32,839**	**11**	**13,882**	**341**	**-**	**3,790**	**11,296**	**28-66**	**15502-22556**	**353-731**	**5921-80573**	**3128-7367**	**2875-24728**	**37301-76896**	**1,478**
x 32nd Street Naval Station	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Barrio Logan	45-84	1829-3075	2181-3427	279	199	-	10	-	-	-	189	-	-	-	-	-	-	-	283-525	-	57-129	-	45-84	1245-2138	73
Black Mountain Ranch	926-926	2551-2551	4616-4616	2,065	1,357	11	55	-	-	-	-	-	-	70	-	926	295	-	-	66-66	-	616-616	310-310	202-202	-
Carmel Mountain Ranch	-	459-459	5068-5068	4,609	459	-	-	-	-	-	459	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Carmel Valley	18-145	694-835	13503-13644	12,809	669	84	-	-	-	-	84	-	261	-	-	68	172	-	-	-	7-21	15-136	3-9	-	-
Centre City[12]	-	15297-15297	31866-31866	16,338	15,297	-	80	-	-	-	14,210	-	1,007	-	-	-	-	-	-	-	-	-	-	-	231
City Heights	157-287	11432-12937	22381-23886	10,906	979	4	-	-	-	-	431	-	544	-	-	-	-	-	3845-5076	-	581-712	61-153	96-134	5870-5883	43
Clairemont Mesa	121-315	5668-12017	32132-38481	26,464	731	1	-	-	-	-	228	-	502	-	-	-	-	-	-	-	4775-7511	75-243	46-72	41-3460	-
College Area	145-282	7902-12680	12254-17032	4,327	644	-	-	-	-	-	214	-	430	-	-	-	-	-	2057-3539	-	1103-2359	19-47	126-235	3953-5856	25
Del Mar Mesa	133-133	326-326	617-617	291	178	-	-	-	-	-	-	-	-	-	-	178	-	-	-	15-15	-	133-133	-	-	-
x East Elliott	108-579	108-579	108-579	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	108-579	-	-	-
Eastern Area	143-213	8942-9258	20464-20780	11,522	603	-	404	-	15	5	-	-	179	-	-	-	-	-	698-831	-	522-634	41-83	102-130	6976-6977	-
Encanto Neighborhoods	466-1095	4428-7462	14311-17345	9,883	1,101	2	-	-	-	38	1,014	-	47	-	-	-	-	3-14	619-1093	4-11	1977-3399	197-652	269-443	258-749	-
x Fairbanks Country Club	-	-	344-344	344	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Flower Hill	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Golden Hill	137-278	2143-3847	6974-8678	4,823	146	-	-	-	-	-	61	-	85	-	-	-	-	-	-	84-172	1776-3086	0-20	137-258	0-165	8
x Harbor	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kearny Mesa	-	1338-1694	3602-3958	2,264	1,300	-	-	-	-	-	700	-	-	-	-	-	600	-	-	-	-	-	-	38-394	-
Kensington-Talmadge	9-23	2665-3114	6302-6751	3,637	220	-	-	-	-	-	9	-	211	-	-	-	-	-	483-731	-	283-468	4-15	5-8	1670-1672	-
La Jolla	95-514	1337-5336	13598-17597	12,261	177	5	12	-	-	-	-	-	141	-	-	-	19	-	-	-	1058-2615	25-315	70-199	7-2030	-
Linda Vista	102-151	5654-9428	13038-16812	7,384	1,111	-	242	-	-	-	533	-	336	-	-	-	-	-	-	-	4285-6490	2-4	100-147	156-1676	-
x Lindbergh Field	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	-	589-3410	1983-4804	1,394	99	-	-	-	-	-	89	-	10	-	-	-	-	-	484-987	-	6-10	-	-	0-2314	-
Mira Mesa	1044-1892	11282-12833	35016-36567	23,734	9,190	-	-	-	-	144	6,369	-	829	-	-	-	1,848	-	-	-	529-808	1-23	1043-1869	519-943	-
x Miramar Air Station	-	-	557-557	557	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Miramar Ranch North	-	-	4331-4331	4,331	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Mission Bay Park	-	0-12	503-515	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0-2	-	-	0-10	503
Mission Beach	1-22	296-2635	353-2692	57	32	-	-	-	-	-	-	-	32	-	-	-	-	-	-	-	263-2490	-	1-22	0-91	-
Mission Valley	112-127	12905-14477	22616-24188	9,711	6,920	-	166	-	-	-	268	-	1,706	-	-	100	4,680	-	-	-	-	-	112-127	5873-7430	-
Navajo	927-3872	4517-12414	22992-30889	18,475	1,554	15	-	-	-	-	1,154	-	385	-	-	-	-	4-8	144-332	-	809-3504	56-121	871-3751	1079-3144	-
x NCFUA Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NCFUA Subarea 2	55-55	155-155	203-203	48	100	-	-	-	-	100	-	-	-	-	-	-	-	-	-	-	-	55-55	-	-	-
Normal Heights	2-17	2987-3561	6190-6764	3,203	531	-	-	-	-	-	366	-	165	-	-	-	-	-	356-456	-	1032-1486	2-14	0-3	1066-1071	-
North Park	195-285	10979-18098	20111-27230	9,132	1,095	-	14	-	49	-	500	-	532	-	-	-	-	-	4306-5555	-	5298-7785	9-44	186-241	85-3378	-
Ocean Beach	8-27	1628-4247	4224-6843	2,596	122	-	-	-	-	-	-	-	122	-	-	-	-	-	-	-	1497-3112	0-1	8-26	1-986	-
Old San Diego	31-48	78-189	400-511	307	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	41-65	-	31-48	6-76	15
Otay Mesa[8,9]	8087-14747	19560-32257	22971-35668	3,410	5,435	28	-	-	-	314	2,060	-	346	-	-	365	2,322	-	-	-	71-137	35-159	8052-14588	5967-11938	1
Otay Mesa-Nestor	36-114	3186-5149	17871-19834	14,684	653	-	-	-	-	182	-	11	460	-	-	-	-	-	-	55-178	1972-3033	31-107	5-7	470-1171	1
Pacific Beach	46-112	3896-12349	10961-19414	6,871	420	-	-	-	51	-	50	-	319	-	-	-	-	-	-	-	3430-6916	11-34	35-78	0-4901	194
Pacific Highlands Ranch	1049-1049	4620-4620	6211-6211	1,591	2,446	20	-	-	-	-	-	-	-	47	-	1,745	634	-	-	-	-	763-763	286-286	1125-1125	-
Peninsula	144-280	4234-5072	17171-18009	12,937	856	4	6	-	-	-	47	-	799	-	-	-	-	-	555-559	1-2	2349-2349	22-100	122-180	329-1026	-
Rancho Bernardo	13-563	734-1284	18187-18737	17,453	721	3	-	-	-	-	316	-	402	-	-	-	-	-	-	-	-	13-563	-	-	-
Rancho Encantada	0-117	316-433	840-957	524	316	165	-	-	-	-	-	-	-	151	-	-	-	-	-	-	-	0-117	-	-	-
Rancho Penasquitos	123-412	1004-1978	14728-15702	13,724	250	-	-	-	-	-	-	-	250	-	-	-	-	-	-	-	631-1316	42-234	81-178	-	-

: Table 5
2008–2009 Residential Land Inventory Planning Areas in the San Diego Region Units (cont'd)

Area Name[6,11]	Residential Land Units: Potential Units on Vacant 2009 Res Acres [1]	Potential Units on Developable 2009 Res Acres [2]	Existing & Potential Units on All 2009 Res Acres [3]	Existing Units on Fully Developed 2009 Acres[4]	Total Units in the Develop-ment Pipeline[5]	Market Status Inventory of Residential Land 2009 Residential Units by Area — Immediately Available: ENAS	ENAM	ERAS	ERAM	Short-Term Available: ENPS	ENPM	ERPS	ERPM	ENAT1[7]	ENAT2[7]	Long-Term Available: ENPT1[7]	ENPT2[7]	Developed[4]: DRS	DRM	DUIS	DUIM	Vacant[4]: VSF	VMF	Planned Mixed Use[4]: PMU	Other[4]: Redev to Non-Res
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)
x Sabre Springs	-	-	3938-3938	3,938	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x San Pasqual	-	1-1	16-16	15	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
San Ysidro	368-684	3366-4978	7941-9553	4,538	1,516	-	2	-	-	-	1,484	-	30	-	-	-	-	21-44	1038-1659	52-105	371-559	220-449	148-235	0-411	37
x Scripps Miramar Ranch	3-12	268-329	7419-7480	7,151	197	-	-	-	-	17	114	-	66	-	-	-	-	-	-	68-120	-	3-12	-	-	-
x Scripps Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Serra Mesa	15-33	873-1143	8517-8787	7,638	805	-	160	-	-	43	-	-	602	-	-	-	-	-	-	-	53-163	6-15	9-18	0-142	6
x Skyline-Paradise Hills	68-391	386-805	19197-19616	18,811	236	-	-	-	-	14	12	-	210	-	-	-	-	-	-	4-54	70-112	14-311	54-80	8-12	-
Southeastern San Diego	169-415	2305-4034	15102-16831	12,475	385	1	-	-	-	18	252	-	114	-	-	-	-	-	538-1003	4-8	995-1804	16-87	153-328	214-419	322
Tierrasanta	291-583	351-643	11784-12076	11,433	60	-	-	-	-	-	60	-	-	-	-	-	-	-	-	-	-	291-583	-	-	-
x Tijuana River Valley	-	-	3-3	3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Torrey Highlands	231-437	954-1160	3065-3271	2,111	723	-	-	-	-	-	-	-	-	73	-	408	242	-	-	-	-	197-369	34-68	-	-
Torrey Hills	1-8	485-492	3005-3012	2,520	484	-	-	-	-	-	-	-	-	-	-	-	484	-	-	-	-	1-8	-	-	-
x Torrey Pines	9-59	9-59	3056-3106	3,047	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	9-59	-	-	-
University	24-83	4504-6861	26655-29012	22,151	2,921	-	115	-	-	-	835	-	1,971	-	-	-	-	-	-	-	1559-2800	3-41	21-42	0-1057	-
Uptown	343-619	10657-21130	18069-28542	7,393	1,554	3	31	-	-	-	731	-	789	-	-	-	-	-	96-210	-	8521-14698	29-95	314-524	143-4049	19
x Via De La Valle	3-7	3-7	225-229	222	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3-7	-	-	-
City of San Marcos	**1419-3317**	**8002-10281**	**37210-39489**	**28,916**	**5,543**	**122**	**333**	**-**	**-**	**680**	**1,090**	**22**	**84**	**2,650**	**262**	**-**	**300**	**100-198**	**696-745**	**137-287**	**48-64**	**1228-3067**	**191-250**	**59-127**	**292.0**
City of Santee	**1162-2281**	**4286-5747**	**23158-24619**	**18,872**	**2,821**	**238**	**250**	**9**	**188**	**187**	**368**	**6**	**180**	**1,380**	**15**	**-**	**-**	**38-82**	**44-95**	**90-216**	**131-252**	**411-1086**	**751-1195**	**-**	**-**
City of Solana Beach	**42-81**	**336-456**	**6747-6867**	**6,411**	**182**	**7**	**-**	**-**	**-**	**-**	**150**	**-**	**25**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**21-46**	**21-35**	**112-193**	**-**
City of Vista	**1980-3049**	**6352-8704**	**41132-43484**	**34,060**	**998**	**28**	**23**	**59**	**-**	**342**	**433**	**39**	**74**	**-**	**-**	**-**	**-**	**-**	**26-36**	**2106-2359**	**333-460**	**1737-2618**	**243-431**	**909-1802**	**720**
Uncorporated[10,12]	**22133-36798**	**51520-69240**	**187095-204815**	**133,680**	**22,763**	**840**	**224**	**-**	**38**	**8,386**	**1,539**	**257**	**189**	**655**	**97**	**6,841**	**3,697**	**-**	**-**	**4097-4151**	**1003-1004**	**19997-34651**	**2136-2147**	**1524-4524**	**1,895**
Alpine	1573-2363	2809-4271	8717-10179	5,817	334	2	76	-	-	256	-	-	-	-	-	-	-	-	-	509-509	33-33	996-1786	577-577	360-1032	91
x Barona	-	-	22-22	22	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Bonsall	1015-1954	1555-2494	4471-5410	2,915	540	181	-	-	-	283	76	-	-	-	-	-	-	-	-	-	-	984-1923	31-31	-	1
x Central Mountain	273-366	421-518	2526-2623	2,103	135	10	-	-	-	125	-	-	-	-	-	-	-	-	-	13-17	-	273-366	-	-	2
x County Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	181-407	246-478	3227-3459	2,977	64	9	-	-	-	55	-	-	-	-	-	-	-	-	-	1-7	-	181-407	-	-	4
x Desert	5733-7913	6841-9021	9972-12152	2,870	1,023	-	-	-	-	1,023	-	-	-	-	-	-	-	-	-	72-72	13-13	4928-7108	805-805	-	261
Fallbrook	1714-3480	7148-10078	22223-25153	14,822	3,628	68	-	-	-	1,639	971	-	-	-	-	573	377	-	-	1264-1271	25-25	1635-3401	79-79	517-1674	253
Jamul-Dulzura	668-1671	2844-3854	5812-6822	2,942	2,175	30	-	-	-	675	-	-	-	-	-	1,470	-	-	-	1-8	-	668-1671	-	-	26
x Julian	135-261	168-295	1747-1874	1,561	33	-	-	-	-	33	-	-	-	-	-	-	-	-	-	0-1	-	129-255	6-6	-	18
Lakeside	1144-1920	3860-4642	24726-25508	20,628	1,095	138	-	-	-	514	198	82	163	-	-	-	-	-	-	1150-1156	471-471	795-1571	349-349	-	238
x Mountain Empire	991-1280	2493-2783	5019-5309	2,493	1,490	97	-	-	-	345	-	-	-	-	-	978	70	-	-	12-12	0-1	991-1280	-	-	33
North County Metro	568-1195	4051-4680	6390-7019	2,339	3,475	79	148	-	-	108	-	-	-	-	-	1,974	1,166	-	-	8-10	-	568-1195	-	-	-
x North Mountain	929-1247	930-1248	2381-2699	1,445	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1-1	-	926-1233	3-14	-	6
Otay[13]	1-1	2739-2739	2739-2739	-	2,738	-	-	-	-	-	-	-	-	-	-	1,330	1,408	-	-	-	-	1-1	-	-	-
Pala-Pauma	1942-2278	3009-3345	4542-4878	1,523	1,041	6	-	-	-	1,035	-	-	-	-	-	-	-	-	-	26-26	-	1942-2278	-	-	10
x Pendleton-De Luz	227-265	227-265	6891-6929	6,664	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	227-265	-	-	-
x Rainbow	97-268	97-268	777-948	679	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	97-268	-	-	1
Ramona	1241-2345	2640-3744	13763-14867	10,561	776	59	-	-	-	717	-	-	-	-	-	-	-	-	-	497-497	126-126	1097-2201	144-144	-	562
San Dieguito	174-1029	1821-2787	12565-13531	10,742	1,598	67	-	-	-	336	6	175	-	453	45	516	-	-	-	-	-	171-1026	3-3	49-160	2
Spring Valley	791-812	1614-1635	21398-21419	19,492	494	1	-	-	38	234	211	-	10	-	-	-	-	-	-	293-293	36-36	712-733	79-79	-	292
x Sweetwater	-	2-2	2-2	-	2	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Valle De Oro	561-739	1797-1996	16654-16853	14,808	792	33	-	-	-	61	6	-	16	-	-	-	676	-	-	145-166	299-299	501-679	60-60	-	49
Valley Center	2175-5004	4208-8097	10531-14420	6,277	1,330	58	-	-	-	947	71	-	-	202	52	-	-	-	-	105-105	-	2175-5004	-	598-1658	46
Regional Total	57350-103413	331378-486336	1302842-1457800	969,419	130,016	2,511	3,777	137	738	13,112	48,289	482	17,891	6,132	1,310	16,378	19,259	1679-3129	21019-32526	9750-14249	54925-92899	35119-67027	22231-36386	56639-110104	6,083

[1] Includes VSF, VMF.

[2] Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, and VMF, and PMU.

[3] Includes Units on Fully Currently Developed Acres, ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, VMF, PMU, and Redev to Non-Res.

[4] Data in these columns are from SANDAG's Series 12 Regional Growth Forecast update, which reflects January 1, 2008. All Series 12 inputs received by SANDAG before June 25, 2009 are incorporated into this report.

[5] Data in these columns were obtained from MarketPointe Realty Advisors' LandTracker information for 4Q 2008. Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, and ENPT2. In some cases, the information on the number of units in the pipeline represents the initial estimate by the developers which may or may not be the number of units ultimately constructed.

[6] The areas represent Spheres of Influence, rather than City boundaries.

[7] Where possible, information about the types of units planned for Master Planned Communities are reflected in the appropriate column (single- or multi-family). If a Master Planned Community is planned to include both single- and multi-family units, the acreage may not be reflected in the same category if the parcels have not been subdivided.

[8] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.

[9] Vernal pool litigatin in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels in the area.

[10] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for furthe details on their General Plan Update.

[11] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.

[12] These areas may not have high and low density ranges for residential units outlined in the General Plan. Thus, the potential units in these areas are not reflected in this table, which results in the total potential developable units to be underestimated.

[13] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.

x The area is not reflected on a map or summary sheet in this report.

2.3. Summary of Combined Inventories

: ***More than 99 percent of the immediately available employment land (391 acres) in the unincorporated County is in the Otay Planning Area.*** Although the Otay Planning Area has no immediately available residential land or units, the Otay Mesa Planning Area (City of San Diego) has 5,435 units in the development pipeline and the additional capacity for between 5,967 and 11,938 units on land classified as planned mixed use (accommodating both residential and employment uses on the same parcels).

: ***The City of San Diego has 690 acres of immediately available employment land, nearly 72 percent of these acres are in three Planning Areas: Otay Mesa (343 acres or 50%); Mira Mesa (91 acres or 13%); and University (62 acres or 9%).*** These same three Planning Areas contain only 11 percent (17 acres) of the immediately available residential land, which are expected to accommodate 8 percent (143 units) of the units expected to be built on immediately available acres within the City of San Diego. The Otay Mesa Planning Area contains nearly 370 acres of planned mixed use that could accommodate between 5,967 and 11,938 units. In total, the City of San Diego has 160 acres of immediately available residential land that could accommodate an estimated 1,759 units requiring an average density of nearly 11 units per acre.

: ***The City of San Diego has 64,793 residential units in the development pipeline; nearly 92 percent of these units are multifamily.*** Nearly 60 percent of the total units in the pipeline are in four Planning Areas: Center City (15,297 units or 24%); Mira Mesa (9,190 units or 14%); Mission Valley (6,920 units or 11%); and Otay Mesa (5,435 units or 8%). Although the Center City and Mission Valley Planning Areas have few vacant developable employment acres, both have redevelopment acres to accommodate employment growth. In addition, the City of San Diego has 2,285 acres classified as planned mixed use that could accommodate between 37,301 and 76,896 units, a majority of these planned mixed use units could be located in four Planning Areas (Otay Mesa, Eastern Area, City Heights, and Mission Valley).

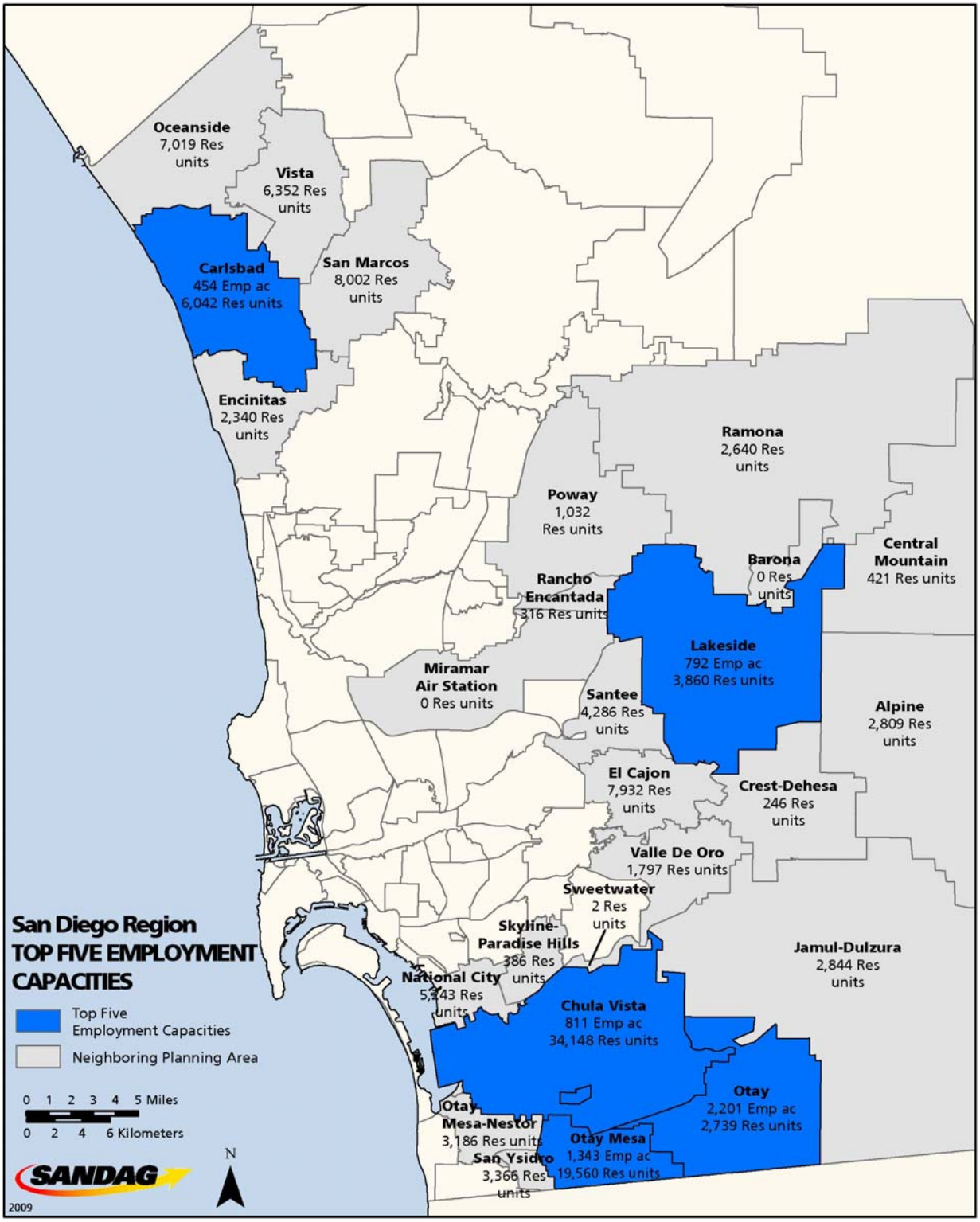
: ***The two Planning Areas within the City of San Diego with the most immediately available residential acres, Rancho Encantata (72 acres) and Carmel Valley (19 acres) have no immediately available employment land****, t*hough this perceived jobs-housing imbalance is likely addressed by the presence of employment land in the surrounding communities.

: ***National City has 20 acres of immediately available residential land that could accommodate 759 units; that number is part of the 56 acres in the development pipeline that could accommodate 4,229 units.*** National City has no immediately available employment land and 26 acres of employment land classified as available in the long term (requires three years or longer to develop the land). Though, again, what could seem to be a potential mismatch in jobs and housing may be mitigated by existing developed lands and land located in neighboring areas.

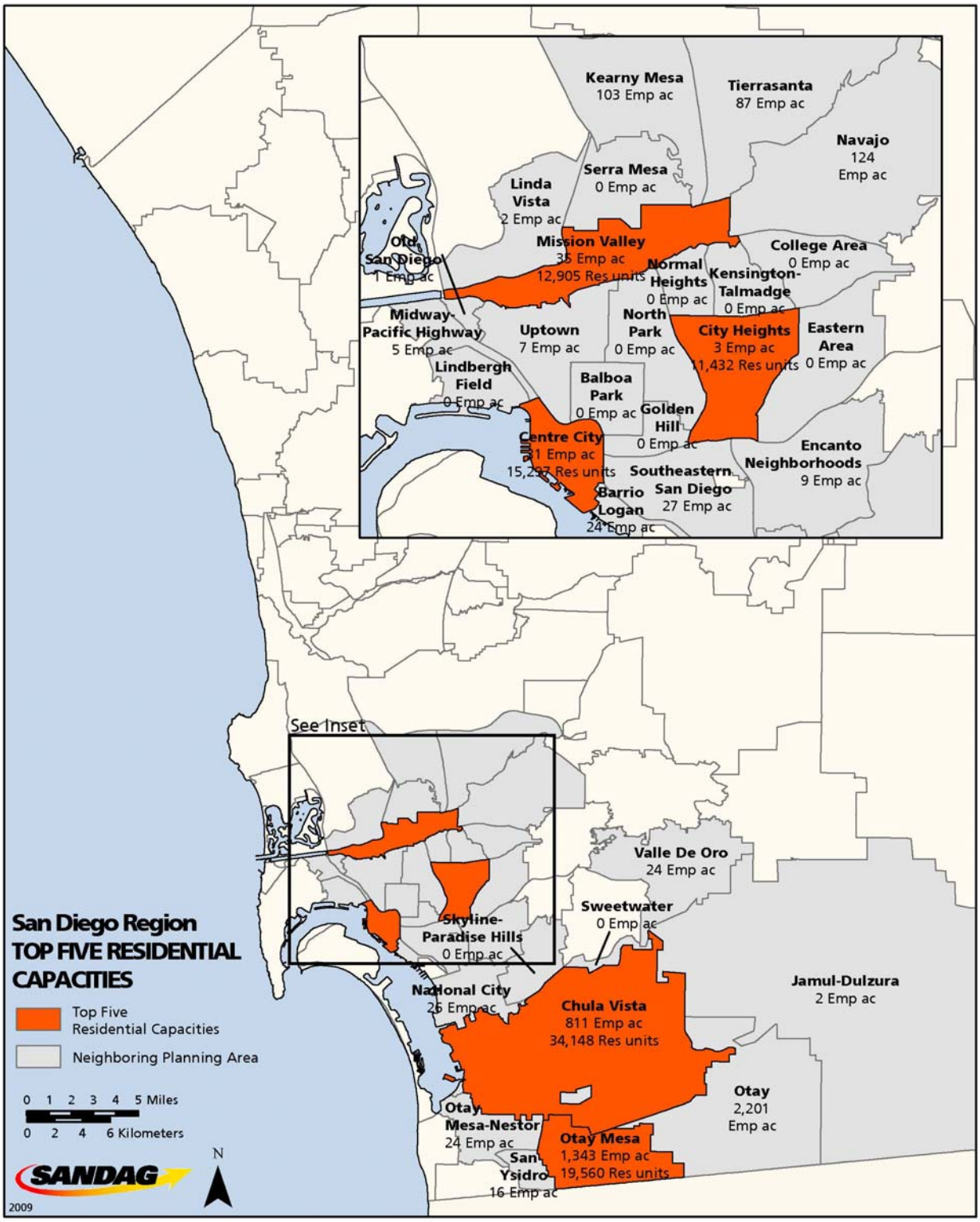
: ***Some areas in the region have comparatively high numbers of residential units or acres of employment land.*** Areas with an abundance of residential units and a relative lack of employment acres, or vice versa, could be considered areas of potential jobs-housing mismatch. Mismatches between the location of residential and employment capacity could result in an increase in the number and length of work-related vehicle trips, which, in turn, contributes to congestion.

In order to visualize the concentration of available employment land and residential units, Maps 1 and 2 on the following pages depict the five planning areas with the most residential and employment capacity, respectively. Employment acres and residential units are listed for each area, showing where imbalances might occur. Neighboring planning areas also are shown and corresponding residential units or employment acres listed. In the event that an imbalance in employment and residential capacity may seem to exist in a planning area, employment or residential capacity in neighboring areas may serve to offset the imbalance.

: ***Map 1***
Top Five Employment Capacities – San Diego Region



: ***Map 2***
Top Five Residential Capacities – San Diego Region



: ***Table 6***

2008–2009 Employment and Residential Land Inventory Planning Areas in the San Diego Region

Gross Acres and Units by Timeframe

Area Name[1,5]	Market Status Inventory of Employment* and Residential Land — 2009 Gross Acres and Units								
	Immediately Available			**Short Term Available**			**Long Term Available**		
	Employ-ment Acres	Residential Acres[7]	Residential Units[7]	Employ-ment Acres	Residential Acres[7]	Residential Units[7]	Employ-ment Acres	Residential Acres[7]	Residential Units[7]
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
City of Carlsbad	**389.0**	**33.0**	**173**	**-**	**559.4**	**2,251**	**65.0**	**710.8**	**3618-5476**
City of Chula Vista	**54.6**	**48.4**	**268**	**80.3**	**222.5**	**7,805**	**676.3**	**3,012.9**	**26075-30612**
City of Coronado	**-**	**2.2**	**30**	**-**	**0.2**	**12**	**-**	**40.9**	**402-1053**
City of Del Mar	**-**	**0.5**	**4**	**-**	**-**	**-**	**4.0**	**26.2**	**9-46**
City of El Cajon	**36.0**	**25.0**	**322**	**-**	**96.5**	**1,842**	**105.4**	**624.9**	**5768-10595**
City of Encinitas	**4.1**	**50.7**	**136**	**0.9**	**197.9**	**333**	**2.3**	**1,283.6**	**1871-3015**
City of Escondido	**69.5**	**896.4**	**491**	**8.7**	**601.7**	**2,389**	**70.6**	**9,033.3**	**5552-9938**
City of Imperial Beach	**-**	**0.1**	**2**	**-**	**9.9**	**408**	**-**	**221.2**	**2578-4138**
City of La Mesa	**0.5**	**17.5**	**52**	**-**	**-**	**-**	**-**	**249.6**	**3874-6547**
City of Lemon Grove	**1.7**	**1.1**	**8**	**-**	**15.5**	**79**	**1.9**	**334.8**	**1335-2509**
City of National City	**-**	**20.3**	**759**	**-**	**36.0**	**3,470**	**26.0**	**348.5**	**1014-6179**
City of Oceanside	**169.3**	**76.0**	**742**	**-**	**371.8**	**1,449**	**169.8**	**1,243.0**	**4828-8433**
City of Poway	**97.4**	**145.6**	**58**	**-**	**1,050.5**	**120**	**74.4**	**6,933.3**	**854-2454**
City of San Diego	**690.1**	**160.2**	**1,759**	**76.7**	**1,030.2**	**47,948**	**1,765.0**	**11,161.2**	**130194-228003**
x 32nd Street Naval Station	-	-	-	-	-	-	-	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-
Barrio Logan	-	0.2	10	-	2.8	189	24.4	51.8	1630-2876
Black Mountain Ranch	-	6.3	66	-	1.1	70	29.7	991.5	2415-2415
Carmel Mountain Ranch	-	-	-	-	27.1	459	-	-	-
x Carmel Valley	-	19.3	84	-	23.4	345	-	82.7	265-406
Centre City	-	1.6	80	-	48.5	15,217	30.6	131.7	-
City Heights	-	0.4	4	-	21.0	975	3.1	524.5	10453-11958
x Clairemont Mesa	-	0.5	1	-	18.1	730	-	437.5	4937-11286
x College Area	-	-	-	-	13.8	644	-	198.6	7258-12036
x Del Mar Mesa	-	-	-	-	5.0	-	-	344.2	326-326
East Elliott	-	-	-	-	-	-	13.1	118.0	108-579
x Eastern Area	-	11.6	419	-	4.6	184	-	258.6	8339-8655
Encanto Neighborhoods	-	0.5	2	8.6	17.7	1,099	-	454.7	3327-6361
x Fairbanks Country Club	-	-	-	-	-	-	-	-	-
x Flower Hill	-	-	-	-	-	-	-	-	-
x Golden Hill	-	-	-	-	4.1	146	-	106.6	1997-3701
x Harbor	-	-	-	-	-	-	-	-	-
Kearny Mesa	48.4	-	-	-	6.1	700	54.4	27.6	638-994
x Kensington-Talmadge	-	-	-	-	4.5	220	-	125.4	2445-2894
x La Jolla	-	2.6	17	-	2.3	141	-	317.8	1179-5178
Linda Vista	-	6.6	242	-	20.8	869	1.7	248.7	4543-8317
Lindbergh Field	-	-	-	-	-	-	-	-	-
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	-	-	-	-	1.1	99	4.9	115.8	490-3311
Mira Mesa	91.0	-	-	8.7	209.0	7,342	189.6	194.5	3940-5491
x Miramar Air Station	-	-	-	-	-	-	-	141.7	-
Miramar Ranch North	29.1	-	-	-	-	-	0.0	-	-
x Mission Bay Park	-	-	-	-	-	-	-	0.5	0-12
x Mission Beach	-	-	-	-	0.3	32	-	96.2	264-2603
Mission Valley	4.8	3.9	166	-	50.1	1,974	30.5	416.2	10765-12337
Navajo	1.6	2.2	15	-	41.7	1,539	122.8	266.6	2963-10860
x NCFUA Reserve	-	-	-	-	-	-	-	-	-
x NCFUA Subarea 2	-	-	-	-	81.7	100	-	119.5	55-55
x Normal Heights	-	-	-	-	7.8	531	-	165.5	2456-3030
x North Park	-	1.2	63	-	16.7	1,032	-	547.7	9884-17003
x Ocean Beach	-	-	-	-	1.9	122	-	189.0	1506-4125
x Old San Diego	1.3	-	-	-	-	-	-	7.7	78-189
Otay Mesa[2,3]	343.3	3.5	28	26.1	40.3	2,720	973.7	1,003.8	16812-29509
x Otay Mesa-Nestor	-	-	-	-	38.2	653	24.2	282.8	2533-4496
x Pacific Beach	-	0.9	51	-	5.9	369	-	594.3	3476-11929
Pacific Highlands Ranch	-	2.1	20	-	-	47	-	574.3	4553-4553
x Peninsula	-	1.3	10	-	10.2	846	1.2	173.6	3378-4216
Rancho Bernardo	32.6	0.5	3	22.7	26.4	718	20.8	202.9	13-563
x Rancho Encantada	-	72.9	165	-	71.7	151	-	74.2	0-117
x Rancho Penasquitos	-	-	-	-	10.2	250	-	167.6	754-1728
Sabre Springs	-	-	-	-	-	-	4.5	-	-
x San Pasqual	-	1.3	1	-	-	-	-	0.2	-
San Ysidro	-	0.2	2	-	10.9	1,514	16.4	253.2	1850-3462
Scripps Miramar Ranch	41.0	-	-	-	16.7	197	3.4	22.6	71-132
x Scripps Reserve	-	-	-	-	-	-	-	-	-
x Serra Mesa	-	6.4	160	-	36.9	645	-	12.1	68-338
x Skyline-Paradise Hills	-	-	-	-	13.7	236	-	48.8	150-569
Southeastern San Diego	-	0.1	1	4.1	8.6	384	22.9	210.0	1920-3649
x Tierrasanta	-	-	-	-	3.2	60	86.5	58.4	291-583
x Tijuana River Valley	-	-	-	-	-	-	-	-	-
Torrey Highlands	20.8	-	-	-	7.6	73	-	148.3	881-1087
Torrey Hills	9.9	-	-	-	-	-	-	15.4	485-492
Torrey Pines	4.0	-	-	-	-	-	33.9	11.5	9-59
University	62.1	13.3	115	6.6	76.0	2,806	65.7	124.7	1583-3940
x Uptown	0.2	1.2	34	-	22.4	1,520	7.0	498.0	9103-19576
x Via De La Valle	-	-	-	-	-	-	-	3.5	3-7
City of San Marcos	**32.6**	**145.5**	**455**	**21.3**	**665.4**	**4,788**	**337.5**	**4,395.3**	**2759-5038**
City of Santee	**31.3**	**141.7**	**685**	**64.5**	**1,092.0**	**2,136**	**174.1**	**759.4**	**1465-2926**
City of Solana Beach	**-**	**1.4**	**7**	**-**	**2.8**	**175**	**1.3**	**29.5**	**154-274**
City of Vista	**70.6**	**39.7**	**110**	**-**	**172.5**	**888**	**89.7**	**1,818.7**	**5354-7706**
Uncorporated[4,6]	**393.4**	**1,565.0**	**1,102**	**178.8**	**17,305.2**	**11,123**	**3,965.7**	**387,712.2**	**39295-57015**
Alpine	-	8.1	78	-	618.4	256	235.9	9,792.2	2475-3937
x Barona	-	-	-	-	-	-	-	-	-
x Bonsall	-	351.2	181	-	1,004.5	359	8.2	8,637.2	1015-1954
x Central Mountain	-	47.0	10	-	303.8	125	-	13,457.4	286-383
x County Islands	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	-	13.9	9	-	110.7	55	-	6,686.7	182-414
x Desert	-	-	-	-	1,834.2	1,023	217.5	69,183.1	5818-7998
Fallbrook	-	193.1	68	-	1,601.3	2,610	260.3	11,133.5	4470-7400
x Jamul-Dulzura	-	256.2	30	-	949.4	675	2.2	26,727.3	2139-3149
x Julian	-	-	-	-	688.6	33	8.1	9,798.5	135-262
Lakeside	-	37.8	138	155.7	1,011.0	957	636.5	10,242.2	2765-3547
x Mountain Empire	-	58.7	97	-	1,556.9	345	359.3	60,962.2	2051-2341
x North County Metro	-	92.5	227	-	289.6	108	-	15,162.1	3716-4345
x North Mountain	-	-	-	-	-	-	0.6	39,639.1	930-1248
Otay[8]	391.3	-	-	-	-	-	1,810.2	859.5	2739-2739
x Pala-Pauma	-	23.8	6	-	1,004.7	1,035	-	34,168.4	1968-2304
x Pendleton-De Luz	-	-	-	-	-	-	-	11,282.6	227-265
x Rainbow	-	-	-	-	-	-	10.8	5,632.6	97-268
Ramona	-	194.3	59	-	3,147.1	717	259.1	26,808.8	1864-2968
San Dieguito	-	114.1	67	-	1,090.7	1,015	7.4	6,104.5	739-1705
Spring Valley	2.2	7.2	39	23.1	71.4	455	38.1	502.0	1120-1141
x Sweetwater	-	-	2	-	-	-	-	-	0-0
Valle De Oro	-	19.5	33	-	31.4	83	23.5	848.7	1681-1880
x Valley Center	-	147.8	58	-	1,991.6	1,272	87.9	20,083.7	2878-6767
Regional Total	2,040	3,370	7,163	431	23,430	87,216	7,529	429,939	235866-390824

[1] The areas represent Spheres of Influence, rather than City boundaries

[2] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.

[3] Vernal pool litigation in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels in the area.

[4] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for further details on their General Plan Update.

[5] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.

[6] These areas do not have high and low density ranges for residential units outlined in the General Plan. Thus, the potential units in these areas are not reflected in this table, which results in the total potential developable units to be underestimated.

[7] Data in these columns were obtained from MarketPointe Realty Advisors' LandTracker information for 4Q 2008. In some cases, the information on the number of units in the pipeline represents the initial estimate by the developers which may or may not be the number of units ultimately constructed. In the case of Long Term Available, only part of the information was obtained fromthe LandTracker database.

[8] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.

x The area is not reflected on a map or summary sheet in this report.

* Employment Land does not include land designated as retail.

: ***Table 7***

2008–2009 Employment and Residential Land Inventory Planning Areas in the San Diego Region

Total Gross Acres and Units

Area Name[8,12]	Market Status Inventory of Employment* and Residential Land — 2009 Gross Acres and Units											
	Vacant			Developable			Developed			All (Vacant, Developable, and		
	Employ-ment Acres (1)	Residential Acres [2] (2)	Potential Residential Units [2] (3)	Employ-ment Acres [3] (4)	Residential Acres [4,7] (5)	Potential Residential Units [4,7] (6)	Employ ment Acres (7)	Residential Acres [7] (8)	Existing Residential Units [7] (9)	Employ ment Acres [5] (10)	Residential Acres [6,7] (11)	Existing & Potential Residential Units [6,7] (12)
City of Carlsbad	**540**	**504**	**2261-2265**	**454**	**1,303**	**6042-7900**	**1,332**	**6,888**	**42,903**	**1,876**	**8,193**	**48970-50828**
City of Chula Vista	**636**	**1,199**	**5599-8388**	**811**	**3,284**	**34148-38685**	**776**	**11,074**	**73,205**	**1,618**	**14,385**	**107353-111890**
City of Coronado	**-**	**2**	**7-20**	**-**	**43**	**444-1095**	**4**	**766**	**8,526**	**4**	**809**	**8970-9621**
City of Del Mar	**4**	**25**	**7-42**	**4**	**27**	**13-50**	**12**	**425**	**2,526**	**16**	**452**	**2539-2576**
City of El Cajon	**120**	**123**	**497-887**	**141**	**746**	**7932-12759**	**678**	**5,392**	**35,317**	**834**	**6,167**	**43570-48397**
City of Encinitas	**9**	**1,074**	**451-1035**	**7**	**1,532**	**2340-3484**	**70**	**5,674**	**24,062**	**81**	**7,210**	**26463-27607**
City of Escondido	**161**	**8,503**	**2180-5244**	**149**	**10,531**	**8432-12818**	**733**	**15,939**	**51,545**	**913**	**26,477**	**59987-64373**
City of Imperial Beach	**-**	**8**	**47-72**	**-**	**231**	**2988-4548**	**-**	**687**	**6,808**	**5**	**923**	**9957-11517**
City of La Mesa	**1**	**92**	**302-473**	**1**	**267**	**3926-6599**	**60**	**3,048**	**24,027**	**79**	**3,315**	**27953-30626**
City of Lemon Grove	**3**	**46**	**124-298**	**4**	**351**	**1422-2596**	**33**	**1,460**	**7,980**	**44**	**1,834**	**9790-10964**
City of National City	**18**	**56**	**167-388**	**26**	**405**	**5243-10408**	**487**	**1,480**	**13,465**	**537**	**1,895**	**18866-24031**
City of Oceanside	**398**	**883**	**2466-4766**	**339**	**1,691**	**7019-10624**	**757**	**9,121**	**62,402**	**1,173**	**10,821**	**69550-73155**
City of Poway	**172**	**6,905**	**503-1914**	**172**	**8,129**	**1032-2632**	**691**	**8,760**	**16,323**	**866**	**16,891**	**17356-18956**
City of San Diego	**2,075**	**3,205**	**16003-32095**	**2,532**	**12,352**	**179901-277710**	**8,405**	**50,610**	**378,391**	**11,846**	**63,083**	**559770-657579**
x 32nd Street Naval Station	-	-	-	-	-	-	13	-	-	13	-	-
x Balboa Park	-	-	-	-	-	-	-	-	-	-	-	-
Barrio Logan	13	2	45-84	24	55	1829-3075	188	20	279	236	78	2181-3427
Black Mountain Ranch	30	516	926-926	30	999	2551-2551	-	586	2,065	30	1,584	4616-4616
Carmel Mountain Ranch	3	-	-	0	27	459-459	135	430	4,609	138	457	5068-5068
x Carmel Valley	-	63	18-145	-	125	694-835	142	1,535	12,809	142	1,661	13503-13644
Centre City	21	30	-	31	182	15297-15297	95	154	16,338	163	337	31866-31866
City Heights	3	34	157-287	3	546	11432-12937	57	1,233	10,906	73	1,781	22381-23886
x Clairemont Mesa	-	84	121-315	-	456	5668-12017	114	4,194	26,464	118	4,650	32132-38481
x College Area	-	13	145-282	-	212	7902-12680	-	1,066	4,327	2	1,279	12254-17032
x Del Mar Mesa	-	158	133-133	-	349	326-326	-	234	291	-	583	617-617
East Elliott	12	118	108-579	13	118	108-579	-	-	-	13	118	108-579
x Eastern Area	-	18	143-213	-	275	8942-9258	-	1,535	11,522	17	1,810	20464-20780
Encanto Neighborhoods	9	171	466-1095	9	473	4428-7462	28	2,091	9,883	44	2,564	14311-17345
x Fairbanks Country Club	-	-	-	-	-	-	-	133	344	-	133	344-344
x Flower Hill	-	-	-	-	-	-	6	-	-	6	-	-
x Golden Hill	-	12	137-278	-	111	2143-3847	1	352	4,823	8	464	6974-8678
x Harbor	-	-	-	-	-	-	0	-	-	0	-	-
Kearny Mesa	107	-	-	103	34	1338-1694	1,352	146	2,264	1,502	180	3602-3958
x Kensington-Talmadge	-	3	9-23	-	130	2665-3114	-	607	3,637	2	737	6302-6751
x La Jolla	-	84	95-514	-	323	1337-5336	3	3,017	12,261	11	3,340	13598-17597
Linda Vista	2	5	102-151	2	276	5654-9428	55	988	7,384	75	1,264	13038-16812
Lindbergh Field	1	-	-	-	-	-	47	-	-	60	-	-
x Los Penasquitos Canyon Preserve	-	-	-	-	-	-	-	-	-	-	-	-
Midway-Pacific Highway	3	-	-	5	117	589-3410	117	102	1,394	173	219	1983-4804
Mira Mesa	229	78	1044-1892	289	404	11282-12833	2,068	2,605	23,734	2,379	3,008	35016-36567
x Miramar Air Station	-	142	-	-	142	-	170	75	557	170	217	557-557
Miramar Ranch North	34	-	-	29	-	-	39	545	4,331	72	545	4331-4331
x Mission Bay Park	-	-	-	-	1	0-12	-	0	-	-	80	503-515
x Mission Beach	-	1	1-22	-	97	296-2635	0	92	57	0	188	353-2692
Mission Valley	30	3	112-127	35	470	12905-14477	288	353	9,711	342	823	22616-24188
Navajo	89	103	927-3872	124	310	4517-12414	84	3,160	18,475	358	3,471	22992-30889
x NCFUA Reserve	-	-	-	-	-	-	2	-	-	2	-	-
x NCFUA Subarea 2	-	119	55-55	-	201	155-155	-	11	48	-	212	203-203
x Normal Heights	-	4	2-17	-	173	2987-3561	-	385	3,203	0	559	6190-6764
x North Park	-	13	195-285	-	566	10979-18098	1	1,119	9,132	7	1,685	20111-27230
x Ocean Beach	-	1	8-27	-	191	1628-4247	0	309	2,596	1	499	4224-6843
x Old San Diego	1	2	31-48	1	8	78-189	15	17	307	17	26	400-511
Otay Mesa[9,10]	935	505	8087-14747	1,343	1,048	19560-32257	965	414	3,410	2,543	1,463	22971-35668
x Otay Mesa-Nestor	4	17	36-114	24	321	3186-5149	61	1,873	14,684	93	2,195	17871-19834
x Pacific Beach	0	9	46-112	-	601	3896-12349	5	1,320	6,871	9	1,926	10961-19414
Pacific Highlands Ranch	22	211	1049-1049	-	576	4620-4620	-	322	1,591	22	898	6211-6211
x Peninsula	8	24	144-280	1	185	4234-5072	26	1,885	12,937	41	2,070	17171-18009
Rancho Bernardo	94	203	13-563	76	230	734-1284	519	2,642	17,453	636	2,871	18187-18737
x Rancho Encantada	-	74	0-117	-	219	316-433	-	164	524	-	383	840-957
x Rancho Penasquitos	-	69	123-412	-	178	1004-1978	5	2,454	13,724	5	2,632	14728-15702
Sabre Springs	7	-	-	5	-	-	75	419	3,938	83	419	3938-3938
x San Pasqual	-	0	-	-	1	1-1	-	28	15	-	29	16-16
San Ysidro	47	63	368-684	16	264	3366-4978	35	568	4,538	89	838	7941-9553
Scripps Miramar Ranch	56	3	3-12	44	39	268-329	202	1,294	7,151	262	1,333	7419-7480
x Scripps Reserve	-	-	-	-	-	-	-	-	-	-	-	-
x Serra Mesa	-	3	15-33	-	55	873-1143	3	943	7,638	3	999	8517-8787
x Skyline-Paradise Hills	-	40	68-391	-	63	386-805	7	2,805	18,811	7	2,867	19197-19616
Southeastern San Diego	6	54	169-415	27	219	2305-4034	111	1,079	12,475	143	1,316	15102-16831
x Tierrasanta	88	58	291-583	87	62	351-643	10	1,321	11,433	98	1,383	11784-12076
x Tijuana River Valley	-	-	-	-	-	-	-	11	3	-	11	3-3
Torrey Highlands	21	47	231-437	21	156	954-1160	11	367	2,111	32	523	3065-3271
Torrey Hills	10	2	1-8	10	15	485-492	61	239	2,520	71	254	3005-3012
Torrey Pines	38	11	9-59	38	11	9-59	301	457	3,047	339	469	3056-3106
University	150	6	24-83	134	214	4504-6861	989	1,780	22,151	1,138	1,994	26655-29012
x Uptown	2	24	343-619	7	522	10657-21130	3	1,079	7,393	57	1,601	18069-28542
x Via De La Valle	-	4	3-7	-	4	3-7	-	53	222	-	57	225-229
City of San Marcos	**398**	**3,476**	**1419-3317**	**391**	**5,206**	**8002-10281**	**787**	**6,872**	**28,916**	**1,241**	**12,107**	**37210-39489**
City of Santee	**225**	**668**	**1162-2281**	**270**	**1,993**	**4286-5747**	**220**	**2,776**	**18,872**	**507**	**4,769**	**23158-24619**
City of Solana Beach	**1**	**19**	**42-81**	**1**	**34**	**336-456**	**52**	**1,168**	**6,411**	**53**	**1,202**	**6747-6867**
City of Vista	**122**	**1,273**	**1980-3049**	**160**	**2,031**	**6352-8704**	**1,048**	**8,939**	**34,060**	**1,226**	**11,035**	**41132-43484**
Uncorporated[11,13]	**4,063**	**381,678**	**22133-36798**	**4,538**	**406,582**	**51520-69240**	**1,124**	**190,902**	**133,680**	**5,785**	**597,947**	**187095-204815**
Alpine	218	9,625	1573-2363	236	10,419	2809-4271	21	11,603	5,817	258	22,033	8717-10179
x Barona	-	-	-	-	-	-	-	27	22	-	27	22-22
x Bonsall	6	8,406	1015-1954	8	9,993	1555-2494	-	6,258	2,915	8	16,253	4471-5410
x Central Mountain	-	13,441	273-366	-	13,808	421-518	-	6,096	2,103	-	19,905	2526-2623
x County Islands	-	-	-	-	-	-	-	-	-	-	-	-
x Crest-Dehesa	-	6,674	181-407	-	6,811	246-478	-	5,394	2,977	-	12,206	3227-3459
x Desert	197	69,153	5733-7913	217	71,017	6841-9021	4	4,935	2,870	221	75,991	9972-12152
Fallbrook	252	10,230	1714-3480	260	12,928	7148-10078	53	15,923	14,822	332	28,886	22223-25153
x Jamul-Dulzura	2	25,690	668-1671	2	27,933	2844-3854	8	13,902	2,942	10	41,850	5812-6822
x Julian	0	9,793	135-261	8	10,487	168-295	10	5,119	1,561	18	15,612	1747-1874
Lakeside	668	9,974	1144-1920	792	11,291	3860-4642	251	11,561	20,628	1,045	22,912	24726-25508
x Mountain Empire	223	60,123	991-1280	359	62,578	2493-2783	41	19,312	2,493	400	81,936	5019-5309
x North County Metro	-	13,328	568-1195	-	15,544	4051-4680	-	3,470	2,339	-	19,062	6390-7019
x North Mountain	-	39,638	929-1247	1	39,639	930-1248	2	10,641	1,445	3	50,284	2381-2699
Otay[14]	2,205	835	1-1	2,201	860	2739-2739	-	-	-	2,294	860	2739-2739
x Pala-Pauma	-	34,162	1942-2278	-	35,197	3009-3345	10	6,081	1,523	10	41,299	4542-4878
x Pendleton-De Luz	-	11,283	227-265	-	11,283	227-265	267	5,037	6,664	267	16,320	6891-6929
x Rainbow	11	5,633	97-268	11	5,633	97-268	5	2,596	679	16	8,234	777-948
Ramona	156	26,689	1241-2345	259	30,150	2640-3744	91	21,841	10,561	354	52,044	13763-14867
San Dieguito	7	5,909	174-1029	7	7,309	1821-2787	153	10,844	10,742	163	18,154	12565-13531
Spring Valley	49	406	791-812	63	581	1614-1635	181	3,378	19,492	244	3,986	21398-21419
x Sweetwater	-	-	-	-	-	2-2	-	-	-	-	-	2-2
Valle De Oro	12	688	561-739	24	900	1797-1996	7	6,462	14,808	30	7,366	16654-16853
x Valley Center	55	19,997	2175-5004	88	22,223	4208-8097	22	20,423	6,277	111	42,727	10531-14420
Regional Total	8,840	409,738	57350-103413	10,000	456,740	331378-486336	17,268	331,981	969,419	28,703	789,515	1302842-1457800

[1] Includes VNE, VENI-LT, VEI, VENI-ST, VPR, VPL, UC, VU.
[2] Includes VSF, VMF.
[3] Includes VNE, VENI-LT, R-LT, VEI, VENI-ST, R-ST, VPR, and VPL.
[4] Includes ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, and VMF, and PMU.
[5] Includes Developed Acres, VNE, VENI-LT, R-LT, VEI, VENI-ST, R-ST, VPR, VPL, UC, VU, and Redev to Non-Emp.
[6] Includes Fully Developed Acres, ENAS, ENAM, ERAS, ERAM, ENPS, ENPM, ERPS, ERPM, ENAT1, ENAT2, ENPT1, ENPT2, DRS, DRM, DUIS, DUIM, VSF, VMF, PMU, and Redev to Non-Res.
[7] Data in these columns are from SANDAG's Series 12 Regional Growth Forecast update, which reflects January 1, 2008.
[8] The areas represent Spheres of Influence, rather than City boundaries.
[9] At the time of publication, a Community Plan update was in progress for Otay Mesa. This report reflects land designations from the Otay Mesa Community Plan Update Scenario 4B. Please see the City of San Diego for further details on the Community Plan update.
[10] Vernal pool litigation in the City of San Diego's Otay Mesa Communtiy Plan Area may affect the development of certain parcels in the area.
[11] The base data for the Unincorporated area comes from the County of San Diego's Draft General Plan, Referral Alternative. Please see the County of San Diego for further details on their General Plan Update.
[12] A reduction in intensity of development in areas around airports may affect the development of vacant parcels, pending legislation on Airport Land Use Compatibility.
[13] These areas may not have high and low density ranges for residential units outlined in the General Plan. Thus, the potential units in these areas are not reflected in this table, which results in the total potential developable units to be underestimated.
[14] Environmental mitigation for the burrowing owl in the County of San Diego's Otay Community Plan Area may affect the development of certain parcels.
x The area is not reflected on a map or summary sheet in this report.
* Employment Land does not include land designated as retail.

3. ISSUES AFFECTING EMPLOYMENT AND RESIDENTIAL LAND USE AND AVAILABLE CAPACITY

3.1. Collocation and Planning for Economic Prosperity

As discussed in the Background section of this report, the first inventory of available employment land was completed during 1998 in response to a growing concern among land developers and businesses in our key high-technology industry clusters about the increasing cost and rapid absorption of employment land in the region. The 1998 study found that of the 11,695 acres of available employment land only 17 percent (1,936 acres) was immediately available (could be developed within one year) with more than 62 percent of these immediately available acres located in just four of 38 Planning Areas inventoried. The study was updated during 2000 and found that the number of immediately available vacant employment acres had fallen to 1,420 acres accounting for 9.4 percent of all available employment acres with more than 60 percent located in just four of the 54 Planning Areas inventoried. This current study completed during 2009 (following nearly two years of economic recession in San Diego) found that the number of immediately available acres had increased to 2,040 acres accounting for 20 percent of total employment acres available with nearly 60 percent located in just four of the Planning Areas inventoried: Otay (391 acres or 19.2%); Carlsbad (389 acres or 19.1%); Otay Mesa (343 acres or 16.8%); and Oceanside (169 acres or 8.2%).

Over most of the time period since 1998, the number of housing units built in the San Diego region has not kept pace with the demand, leading to an upward spike in the median priced unit that culminated in a housing market price bubble that peaked during 2006 at more than $500,000. The median sales price of a house in the region has fallen about 40 percent since 2006; about 50 percent of home sales in the region beginning in early 2009 have been from a foreclosure or short sale causing much of the reported weakness in the local median home price. Although the effects of the recession on the housing market are expected to linger for a number of years to come, at some point the gap between an adequate supply of units and demand is expected to re-emerge, which would push home prices up rapidly. As long as the temporal difference between accommodating housing and employment demand exists, the price of housing will rise faster to equalize the supply and demand pressures in the marketplace.

One trend that has emerged in the past to help meet the market demand for housing is to collocate housing on land designated for employment and/or convert existing employment land, especially industrial, to accommodate new housing. On one hand, collocating housing with employment sites is a fundamental objective of smart growth strategies. In addition, landowners of older especially industrial properties generally are willing to convert their industrial land to residential because of the significantly higher market value. On the other hand, not all jobs and employment sites are compatible with housing and this is especially true for industrial property. Industrial and residential collocation/conversion could result in nuisances and other social impacts. Based on current literature, the negative social impacts could be a result of facilities emitting smoke, odors, vapor or dust, direct lighting to surrounding areas, high noise levels, increased truck traffic, and higher parking demand. In most cases, once established, the residential requirements for compatibility will affect the industrial sites' ability to conduct business, leading to the erosion of the site as an industrial park.

On a broad scale there is a gradation for jobs that ranges between compatible and incompatible with housing. Regionwide less than 15 percent of all jobs should not be collocated next to housing, or 85 percent of jobs are compatible. The incompatible are generally located in a few, concentrated, specifically defined "industrial" areas. Thus, the region has a limited supply of these "prime" industrial sites. In addition, these industrial sites are where a significant portion of our emerging technology and other basic or traded employment clusters are located today and these sites provide the best opportunity for future economic growth and expansion.

During the late 1980s and early 1990s, SANDAG and a wide range of interested parties working together produced the first San Diego Regional Economic Prosperity Strategy (REPS). One element of the REPS was to identify and define the region's traded clusters—businesses in industries that compete nationally and internationally and have the greatest influence on the long-term pace and potential of economic growth, prosperity, and the region's standard of living. The strategy recognizes that these traded clusters are an important starting point for raising the region's standard of living; they are not the end point. Jobs outside of these tightly defined traded clusters will benefit from their expansion and growth, creating additional middle and high paying (value-added) job opportunities. These traded clusters are defined differently than the traditional classification methods, such as Standard Industrial Classification (SIC) or the more recent North American Industry Classification System (NAICS). To better understand our economy, it makes sense to group industries according to shared characteristics, such as specialized technologies, demand for certain types of skilled labor, and firm-to-firm buyer-supplier relationships.

This groundbreaking research identified 16 traded industry employment clusters that play an important and influential role in setting the pace for economic growth in the San Diego region. More importantly for this report, about half of these traded clusters are located on prime industrial land, such as biotechnology, pharmaceuticals, biomedical products, wireless communications, software, defense manufacturing, environmental technology, computers and electronics.

An example of a pro-active policy to preserve the supply of prime industrial land is the City of San Diego's "Economic Prosperity Element" in the City's General Plan. This element identifies and proposes to preserve "prime" industrial land, which supports employment in these important traded clusters. The Prosperity Element also provides guidelines for the conversion or collocation of compatible development on such land. The City of San Diego's Prosperity Element recognizes the importance of these current and future prime industrial sites and, when combined with SANDAG's Smart Growth Opportunity Areas (SGOAs), provide an effective guideline for where public policy should be encouraging growth to occur.

Once the economy begins to turn around from this most recent recession that began nationally during December 2007 and all of the excess "foreclosed" housing units have been purchased and removed from the available inventory, collocation of housing in the prime industrial areas will likely be an issue again unless changes are made that provide for the timely delivery of housing units sufficient to stabilize prices. Strategic Goal 5 in SANDAG's Regional Economic Prosperity Strategy addresses this issue.[3] The Strategy points out that increasing the supply of housing as the demand rises is the most effective way to moderate the rapid rise of home prices. Local jurisdictions can undertake advanced planning and impact analysis of new housing in their SGOAs, even before private landowners submit development proposals, in effect pre-approving the opportunity for

[3] SANDAG, *Building a Foundation to Achieve Global Competitiveness: San Diego Regional Economic Prosperity Strategy*, March 2008, p. 45-47.

development to occur. The development proposals would be consistent with approved plans and current environmental review. The change would be to allow for the product (housing units) to be supplied quickly, as the demand is increasing, keeping the otherwise upward pressure on prices in check and helping remove the need to build new housing units on prime industrial employment land.

An initial step in this direction has been undertaken by SANDAG's Regional Comprehensive Plan (RCP), which identifies potential SGOAs with access to transit and major transportation corridors. These SGOAs are where the region's collective General Plans call for growth to occur first and they are areas that can best support increased housing density. In other words, through our regional planning process, our jurisdictions have identified where they would prefer growth occur. Now our jurisdictions should first, remove as many hurdles and obstacles that would keep them from achieving their objectives and second, promote this outcome by pre-approving development through a master planning process. To encourage and support this change, SANDAG's TransNet Smart Growth Incentive Program provides funding for infrastructure improvements in the SGOAs. In addition, SANDAG's Smart Growth Opportunity funding could be utilized to aid in off-setting the costs imposed upon the jurisdictions from the developmental pre-approval process.

In addition to reducing the upward pressure on home prices and encouraging growth to occur where we are planning to accommodate it so growth can help improve the urban character of communities, streamlining the development and regulatory process also would free up financial resources to fund additional development, provided the market demand had not been fully met. The quicker a developer can plan, construct, and sell a unit, the faster those funds can be reinvested to develop additional units to meet the market demand and limit upward pressure on prices, keeping housing prices and rental rates more stable and affordable and prevent price "spikes."

Implementation of this REPS Strategic Goal will require a cooperative and concerted effort by all local jurisdictions, the development industry, and nonprofit organizations to encourage and facilitate construction of high-density, primarily attached housing units and the required infrastructure improvements and public services.

3.2. Smart Growth Opportunity Areas

Smart Growth Opportunity Areas (SGOAs) and smart growth in general are key mechanisms by which the region can meet its current and future need for housing.

Smart growth is a compact, efficient, and environmentally-sensitive urban development pattern. It focuses future growth and infill development close to jobs, services, and public facilities to maximize the use of existing infrastructure and preserve open space and natural resources.

Smart growth is characterized by more compact, higher density development in key areas throughout the region that is walkable, near public transit, and promotes good community design. Smart growth results in more housing and transportation choices for those who live and work in smart growth areas.

The RCP calls for better coordination between land use and transportation. A key implementation step was the preparation of a "Smart Growth Concept Map" that identifies locations in the region that can support smart growth and transit. The map serves as the foundation for prioritizing transportation investments and determining eligibility for Smart Growth Incentive funds.

The Concept Map contains almost 200 existing, planned, or potential smart growth locations. Transportation and planning professionals from all jurisdictions provided recommendations for these locations. The SANDAG Board of Directors accepted the Concept Map for planning purposes and for use in the *TransNet* Smart Growth Incentive Program.

Smart growth in an urban center like University City looks different from a town center in Escondido or a community center in Imperial Beach. Thus, the Concept Map reflects seven different smart growth place types, with established land use and transportation targets appropriate for each area.[4] If the areas meet the minimum land use and transit service targets identified for their place type, they are identified as "Existing/Planned" smart growth areas. If they do not meet the targets, but have future potential, they are identified as "Potential" smart growth areas.

Immediately Available Land in Smart Growth Opportunity Areas

These SGOAs focus growth where the region wants it to occur. Having a supply of Immediately Available land for both employment and residential opportunities in SGOAs is important to meeting those objectives.

The Inventory shows that there are 255 acres of Immediately Available employment land in 12 of the "Existing/Planned" SGOAs. This represents nearly 13 percent of all Immediately Available employment land in the region. In contrast, there are 185 acres of Immediately Available residential land in 25 of the "Existing/Planned" SGOAs, representing 6 percent of all Immediately Available residential land in the region.

Four of the "Existing/Planned" SGOAs contain both employment and residential land that is considered Immediately Available: Escondido, Mission Road; La Mesa, Baltimore Drive, and Fletcher Parkway; Oceanside, Downtown Oceanside; and San Diego, University (Eastgate Mall Road, Interstate 805, University California San Diego, Nobel Drive). There are 85 total SGOAs categorized as "Existing/Planned."

It is important to note that many SGOAs rely on infill and redevelopment to provide capacity. Since the Task Force determined that infill and redevelopment should not be considered Immediately Available (that is, developable within one year), much of the SGOAs development capacity is not reflected in this discussion of the SGOA's ability to immediately accommodate growth.

3.3. Land Use Regulations

During the 20th century, zoning became the most popular form of local government land use regulation, primarily in reaction to slum conditions in rapidly industrializing cities. In many communities, particularly the developing suburbs, zoning was designed to protect residential areas containing single-family, freestanding houses on relatively large lots. The United States Supreme

[4] Detailed descriptions of the smart growth place types can be found in the SANDAG "Smart Growth Concept Map Site Descriptions," last updated July 25, 2008.

Court, in giving a constitutional stamp of approval in 1926 to Euclid, Ohio's hierarchical form of zoning that put single-family detached residential use at the top of a land use pyramid.

As the country grew and metropolitan areas expanded in the second half of the 20th century, the main pattern of growth was based on the belief that homogeneity of use was more desirable than the traditional heterogeneous pattern of development in urban core cities. Zoning became the key regulatory technique to implement this vision, as well as to respond to concerns about health and safety, the environment, and open space. Most new communities and developing suburbs used zoning to implement residential development favoring relatively large-lot, single-family detached housing. For example, Chicago's 1957 zoning code became a national model for a zoning strategy that reflected the growing importance of the automobile. Detailed regulations based on density separated homes from jobs and stores. This approach to land use regulation has had a significant impact on the cost of housing, which in turn has limited housing opportunities for low- and moderate-income households, particularly in metropolitan areas with multiple zoning jurisdictions, like San Diego.

Exclusionary Effect of Zoning

The single-family detached housing pattern of development did have an exclusionary effect. Households that could not afford the cost of buying and maintaining a single- family house and yard found few alternatives in new suburban developments. In a famous 1971 study of the zoning practices in northern New Jersey counties, law professors Norman Williams, Jr. and Thomas Norman identified six popular land use regulatory techniques that had particular impact on housing opportunities for low- and moderate-income persons: 1) minimum-building-size requirements (normally minimum floor space), 2) exclusion of multiple dwellings from single-family zones, 3) restrictions on the number of bedrooms, 4) prohibition of mobile homes, 5) frontage (i.e. lot width) requirements, and 6) lot size requirements. More recently, a 2003 study from Harvard's Joint Center for Housing Studies found that in their efforts to manage residential growth and preserve open space, state and local jurisdictions have passed numerous land use regulations that have made it increasingly difficult to add market-rate units to the affordable supply. Although aimed at achieving several worthy public interests – including environmental quality, housing quality, and safety and health – these restrictions also serve to make all housing more costly.

Despite all of this history on the effects of land use regulation on home prices, the often-cited reasons for the spectacular run up of U.S. housing prices in the past 10-20 years include lower mortgage rates, creative mortgages, and income/employment growth. These factors, which likely contribute to increasing housing prices, all relate exclusively to housing demand. Housing supply factors, however, are harder to quantify and are typified by opposing view points: environment vs. sprawl, builders vs. planners, parks vs. high-rises, and (most divisively) state vs. local growth management.

Housing prices follow the fundamental law of supply and demand. The challenge for economists is to identify the specific factors that affect housing supply and demand. Economic theory is clear: changes in housing prices are associated with income and demographic factors on the demand side, and land use regulations on the supply side. While price, income, and demographic data are readily available from government sources, regulation data has been the problem to date. It is extraordinarily costly and time consuming to obtain objective and comparative land use regulation data for informative, representative samples. Most studies that do go to the trouble of gathering information on factors that affect the supply of housing units have found that land use regulations

are two to three times more important in explaining the rise in home prices than demand side factors.[5]

Where future development occurs and the form it takes is critical to preserving our environmental health and community character and meeting the demands of the marketplace. As mentioned above, SANDAG's RCP envisions a changing urban form for the San Diego region. To accomplish this change requires addressing the impacts land use regulations have had on housing prices and location. SANDAG's Smart Growth Design Guidelines addresses these issues and are a starting point for local jurisdictions and developers to achieve the smart growth goals identified in the RCP. Outlined below are the Design Guidelines' approaches to several key issues brought forward by the Task Force.

Form-Based Codes

In recent years, form-based codes have emerged as a zoning approach to regulate how buildings establish the physical character of streets and public space, essentially shaping density and building mass. This is in contrast to typical zoning ordinances that regulate land use on a parcel-by-parcel basis, often without consideration for the surrounding built environment. One aspect of these regulations is the floor area ratio (FAR), which was discussed by the Task Force as a form of density that allows for more efficient use of building floor space and can create opportunities for smaller, more naturally affordable units. The Design Guidelines emphasize that using form-based codes as an approach to building regulations (of which FAR are a part) is one way for communities to implement smart growth principles by organizing areas into a series of different types of places and thus providing a desired spatial structure to development.

Parking Standards

Parking ordinances that support the principles of smart growth enable people to modify their travel behavior by using alternate modes of travel, reducing vehicle trip length, and combining vehicle trips, while also accommodating automobiles.

The Design Guidelines emphasize the need for minimum and maximum parking requirements to be carefully tailored to local needs and to not be based solely on generic parking generation rates. For example, by reducing minimum parking requirements, where appropriate, and allowing developers to provide more parking than the minimum, up to a set maximum, if needed; setting more stringent maximum parking standards in areas where public transit is well established, frequent, and convenient; and many other examples.

Many jurisdictions allow multiple land uses to provide shared parking areas, which reduce the total amount of parking that must be provided. This is an implementation of the concept of reducing or eliminating parking requirements where there are shared parking areas that can accommodate peak demand. This concept is outlined and encouraged in the Design Guidelines.

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[5] Gyourko, J and A. Summers. "Residential Land Use Regulation in the Philadelphia MSA," Wharton Working Papers, December 1, 2006.

Gyourko, J., A. Saiz, and A. Summers (2007) "A New Measure of the Local Regulatory Environment for Housing Markets: The Wharton Residential Land Use Regulatory Index," *Urban Economics, forthcoming.*

Richards, R (2008) "Growth Management, Land Use Regulations, and Housing Prices: Implications for Major Cities in Washington State" (Draft 1.3), *Northwest Journal of Business and Economics, forthcoming.*

Also addressed is how local jurisdictions can create parking management districts in which the amount and cost of parking is regulated so that the area meets its parking needs while promoting transit use, ridesharing, and other alternatives to the single-occupancy vehicle.

Lastly, the Design Guidelines encourage flexibility in the configuration of vehicle parking spaces to allow developers to make more efficient use of a site. Two nontraditional configurations include tandem parking or stacked parking for residential uses and converting regular parking areas to higher-capacity valet parking areas for commercial and institutional uses.

Private Yard Space and Common Areas

Plazas, courtyards, and other common outdoor spaces can create a visual connection to the public realm, as well as a physical transition zone between the building and the street, and are an essential component of smart growth site design. A comprehensive open space network helps to connect different uses in large projects and to integrate adjacent land uses on a site. The Design Guidelines call for the use of these semi-public outdoor spaces in commercial development only where it is feasible to support pedestrian activity and connect to the public realm.

Though private yard space is not addressed in the Design Guidelines, it should be noted that the typical standards for this element were mentioned by the Task Force as a concern toward the provision of affordable housing.

Other Factors that can Affect Yield

The Task Force also mentioned infrastructure deficiencies, high and disproportionate impact fees, existing land uses, parcellation and existing ownership patterns, affordable housing mandates, historic resource overlays, overly restrictive land use regulations, mandatory inclusion of common area amenities, and, generally, incongruities between planned densities and zoning and parking standards as other factors that could affect yield.

4. STUDY BACKGROUND AND TECHNICAL APPROACH

In 1998, the San Diego Association of Governments (SANDAG) and the San Diego Regional Economic Development Corporation (EDC) collaborated to construct an inventory and perform a market analysis on the supply of and demand for employment land (nonretail) in the region. The San Diego Region Employment Land Inventory and Market Analysis was designed to address two related issues: first, the contrasting views held by the public sector and private developers concerning the qualitative differences that affect the availability of vacant employment land; and second, a rising concern that an insufficient amount of land was available in specific locations to retain and accommodate the projected growth in some of the region's most promising emerging growth technology clusters. At the time, the EDC was responding to concerns expressed by brokers, developers, and businesses in key high-tech industry clusters about the increasing cost and rapid absorption of available employment land. Thus, a Task Force was convened to examine the issues surrounding the supply and demand of nonretail employment land in the region.

The 1998 land use inventory and market analysis provided a database that proved to be very useful and broadly accepted. As a result it was updated in 2000.

: ***Expanding the database—***This report provides both an update to the 1998 and 2000 Employment Lands Inventory as well as a new Residential Lands Inventory. The inventories are intended to address continuing differences in opinion concerning the adequacy of the inventory of employment and residential land, as well as concerns about the proximity of these types of land to one another and market pressures to convert specific types of employment land to alternative uses. To organize the two inventories, the Task Force split into two subgroups – one group addressing the employment inventory and the other focusing on the residential piece. The results of each subgroups efforts are located in the summary of findings section.

: ***Making the database accessible—***As was true in the past, the Task Force believes that continuing to make this information available and easily accessible to a broad range of users is an import goal. This has been accomplished by making the data available on the Internet. A Web-based Regional Economic Development Information (REDI) System contains features that allow the brokerage community, local jurisdictions, and the general public to view, analyze, and map information found in the Employment and Residential Land Inventory as well as additional demographic and economic information. Please refer to the Appendix for a more detailed description of the REDI system.

Another of the Task Force's primary charges is to inventory the available residential land in the region. The inventory of available residential land is based upon each Planning Area's General or Community Plan information, along with a proprietary database that tracks residential land in the entitlement process. This inventory then was reviewed and classified to reflect each parcel's market status. The market analysis distinguished between land immediately available (requiring one year or less to develop), available in the short term (could be developed between one and three years), and available in the long term (requiring more than three years to develop).

4.1 Planning Areas and Land Use Category Definitions

The Planning Areas, as used in this report, are a compilation of Community Planning Areas (for the City of San Diego and the County of San Diego) and Spheres of Influence (for other jurisdictions). The main criterion used for selecting a Planning Area or City for inclusion into the study was that it had to contain employment or residential land that could accommodate development. The land use category definitions were development from three sources of information, the SANDAG Regional Growth Forecast Landcore database, MarketPointe Realty Advisors Land*Tracker*™ database, and members of the Task Force. Additional information is available in the Appendix. Below is a list of the Planning Areas included in each inventory:

4.2 Planning Areas Included in the Employment Land Inventory

: ***Cities***

Carlsbad	Lemon Grove
Chula Vista	National City
Coronado	Oceanside
Del Mar	Poway
El Cajon	San Marcos
Encinitas	Santee
Escondido	Solana Beach
Imperial Beach	Vista
La Mesa	

: ***County of San Diego–Community Planning Areas***[6]

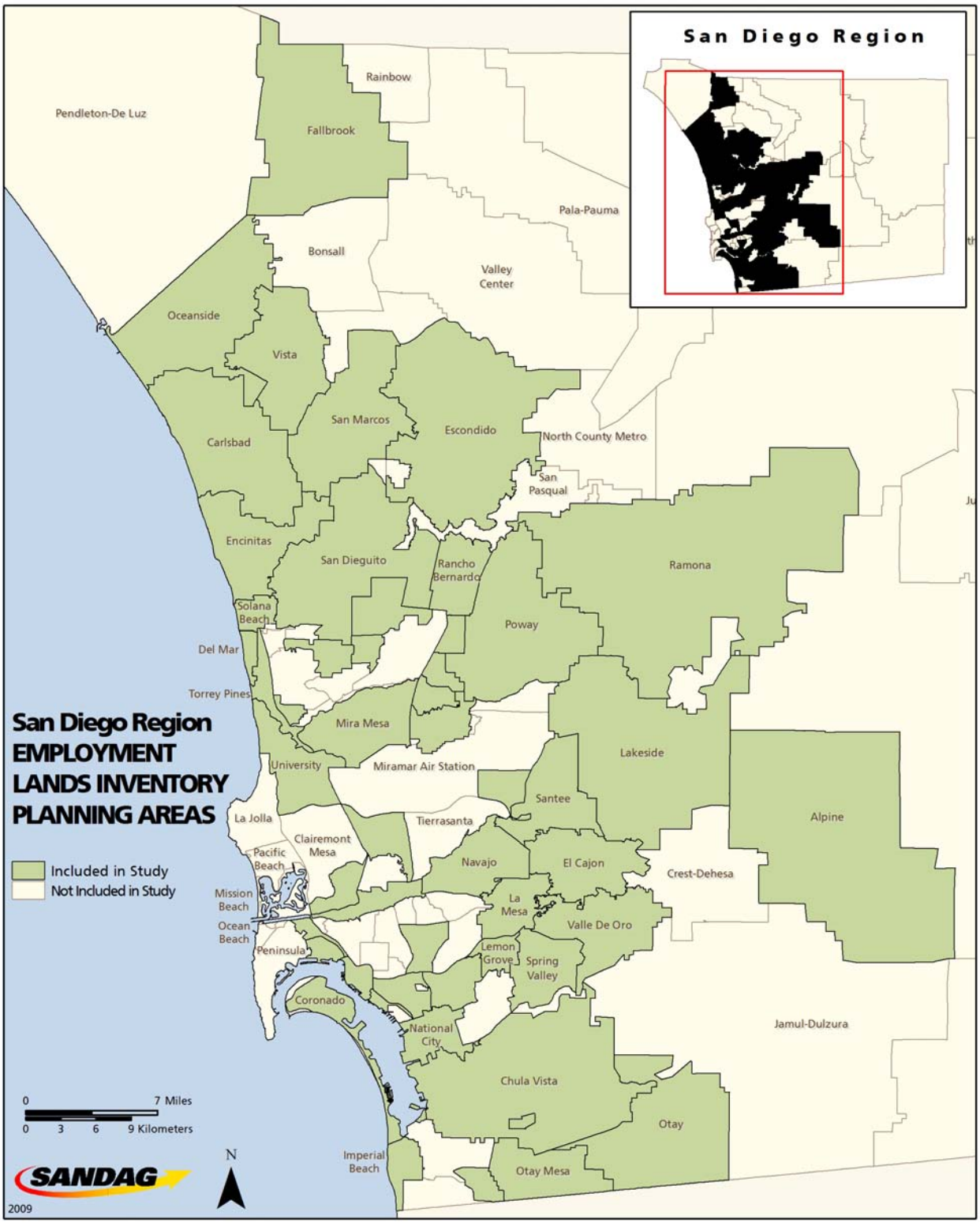
Alpine	North County Metro*
Barona*	North Mountain*
Bonsall*	Otay
Central Mountain*	Pala-Pauma*
County Islands*	Pendleton-De Luz*
Crest-Dehesa*	Rainbow*
Desert*	Ramona
Fallbrook	San Dieguito
Jamul-Dulzura*	Spring Valley
Julian*	Sweetwater*
Lakeside	Valle De Oro
Mountain Empire*	Valley Center

: ***City of San Diego–Community Planning Areas***

32nd Street Naval Station*	Navajo
Balboa Park*	NCFUA Reserve*
Barrio Logan	NCFUA Subarea 2*
Black Mountain Ranch	Normal Heights*
Carmel Mountain Ranch	North Park*
Carmel Valley*	Ocean Beach*
Centre City	Otay Mesa
City Heights	Old San Diego*
Clairemont Mesa*	Otay Mesa-Nestor*
College Area*	Pacific Beach*
Del Mar Mesa*	Pacific Highlands Ranch
East Elliott	Peninsula*
Eastern Area*	Rancho Bernardo
Encanto Neighborhoods	Rancho Encantada*
Fairbanks Country Club*	Rancho Peñasquitos*
Flower Hill*	Sabre Springs
Golden Hill*	San Pasqual*
Harbor*	San Ysidro*
Kearny Mesa	Scripps Miramar Ranch
Kensington-Talmadge*	Tierrasanta*
La Jolla*	Scripps Reserve*
Linda Vista	Serra Mesa*
Lindbergh Field	Skyline-Paradise Hills*
Los Peñasquitos Canyon Preserve*	Southeastern San Diego
Midway-Pacific Highway	Tijuana River Valley*
Mira Mesa	Torrey Highlands
Miramar Air Station*	Torrey Hills
Miramar Ranch North	Torrey Pines
Mission Bay Park*	University
Mission Beach*	Uptown*
Mission Valley	Via De La Valle*

[6] Asterisk indicates that a map is not included due to lack of available land for development.

: ***Map 3***
Employment Lands Inventory Planning Areas

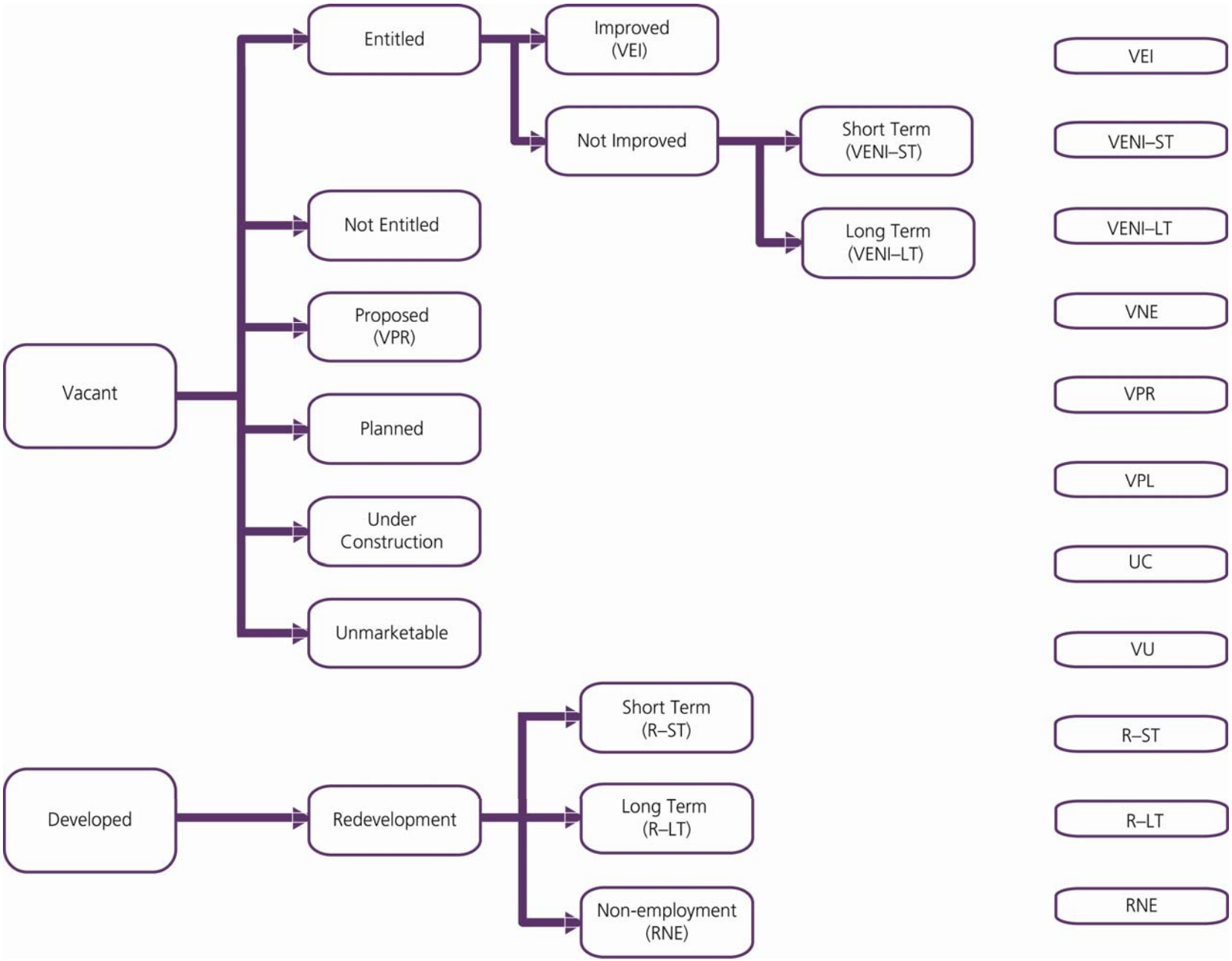


Below is a description of the market status codes used in the Employment Land Inventory.

: ***2009 Inventory of Employment Land–Market Status Code Definitions***
(Additional clarification on terminology can be found in the Glossary of Terms, located in Appendix D)

Land Use Code	Definition	Detailed Definition
Vacant Land–Immediately Available		
VEI	Vacant, Entitled, and Improved	Vacant employment land (industrial/office) with zoning and entitlements in place. Infrastructure improvements have been made, such as preparing pad and installing hook-ups. Entitlement generally means that all discretionary permits have been issued (could be developed in less than one year).
VPL	Vacant, Planned	Vacant employment land on which construction will begin within one year. These may include multiphased projects where some construction has been completed, while other phases have been planned but currently are not under construction.
VPR	Vacant, Proposed	Vacant employment land with entitlements and plans to build, including at a minimum a conceptual site plan. Permit approval is underway and construction is one to two years away.
Vacant Land–Long-Short Available		
VENI–ST	Vacant, Entitled, and Not Improved–Short-Term	Vacant employment land with zoning and entitlements in place. No infrastructure improvements have been made (could be developed between one and three years).
Vacant Land–Long-Term Available		
VNE	Vacant, Not Entitled	Vacant employment land (industrial/office) not fully entitled. Entitlements determine the land's capacity for development, such as product type, building size, parking, and infrastructure requirements. Some discretionary permits and environmental review still are required.
VENI–LT	Vacant, Entitled, and Not Improved–Long-Term	Vacant employment land with zoning and entitlements in place. No infrastructure improvements have been made (could be developed in three years or more).
Vacant Land–Under Construction		
UC	Under Construction	Building(s) are in some stage of construction.
Vacant Land–Unmarketable		
VU	Vacant, Unmarketable	Vacant employment land not designated as constrained by local policy, but unmarketable for employment development because of steep slopes, parcel size, or other physical constraints according to development professionals.
Redevelopment/Infill		
R-ST	Redevelopment–Short-Term	Land in a noncoastal location that a jurisdiction has indicated could redevelop in the short term (could be developed between one and three years).
R-LT	Redevelopment–Long-Term	Land that is located either in a coastal location or that a jurisdiction has indicated could redevelop in the long term (could be developed in three years or more).
RNE	Redevelopment, Nonemployment	Land that currently is designated as employment, but has the opportunity to be reused for nonemployment purposes.

: ***Employment Land Inventory Codes Flowchart***



4.3 Planning Areas Included in the Residential Land Inventory

: *Cities*

Carlsbad	Lemon Grove
Chula Vista	National City
Coronado	Oceanside
Del Mar	Poway
El Cajon	San Marcos
Encinitas	Santee
Escondido	Solana Beach
Imperial Beach	Vista
La Mesa	

: *County of San Diego–Community Planning Areas*[7]

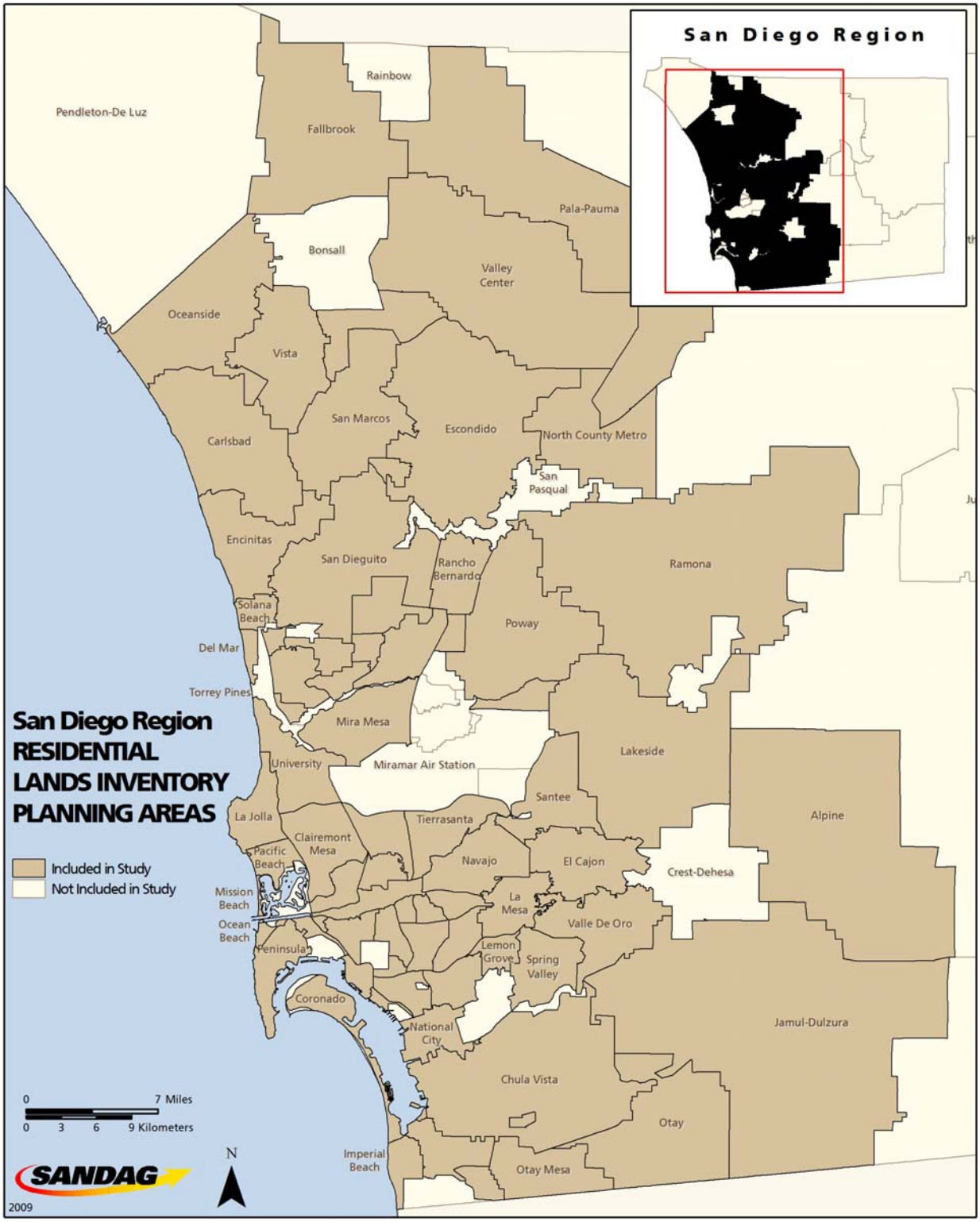
Alpine	North County Metro
Barona*	North Mountain*
Bonsall*	Otay
Central Mountain*	Pala-Pauma
County Islands*	Pendleton-De Luz*
Crest-Dehesa*	Rainbow*
Desert*	Ramona
Fallbrook	San Dieguito
Jamul-Dulzura	Spring Valley
Julian*	Sweetwater*
Lakeside	Valle De Oro
Mountain Empire*	Valley Center

: *City of San Diego–Community Planning Areas*

32nd Street Naval Station*	Navajo
Balboa Park*	NCFUA Reserve*
Barrio Logan	NCFUA Subarea 2
Black Mountain Ranch	Normal Heights
Carmel Mountain Ranch	North Park
Carmel Valley	Ocean Beach
Centre City	Otay Mesa
City Heights	Old San Diego
Clairemont Mesa	Otay Mesa-Nestor
College Area	Pacific Beach
Del Mar Mesa	Pacific Highlands Ranch
East Elliott*	Peninsula
Eastern Area	Rancho Bernardo
Encanto Neighborhoods	Rancho Encantada
Fairbanks Country Club*	Rancho Peñasquitos
Flower Hill*	Sabre Springs*
Golden Hill	San Pasqual*
Harbor*	San Ysidro
Kearny Mesa	Scripps Miramar Ranch*
Kensington-Talmadge	Tierrasanta*
La Jolla	Scripps Reserve*
Linda Vista	Serra Mesa
Lindbergh Field*	Skyline-Paradise Hills*
Los Peñasquitos Canyon Preserve*	Southeastern San Diego
Midway-Pacific Highway	Tijuana River Valley*
Mira Mesa	Torrey Highlands
Miramar Air Station*	Torrey Hills
Miramar Ranch North*	Torrey Pines
Mission Bay Park*	University
Mission Beach	Uptown
Mission Valley	Via De La Valle*

[7] Asterisk indicates that a map is not included due to lack of available land for development.

: ***Map 4***
Residential Lands Inventory Planning Areas



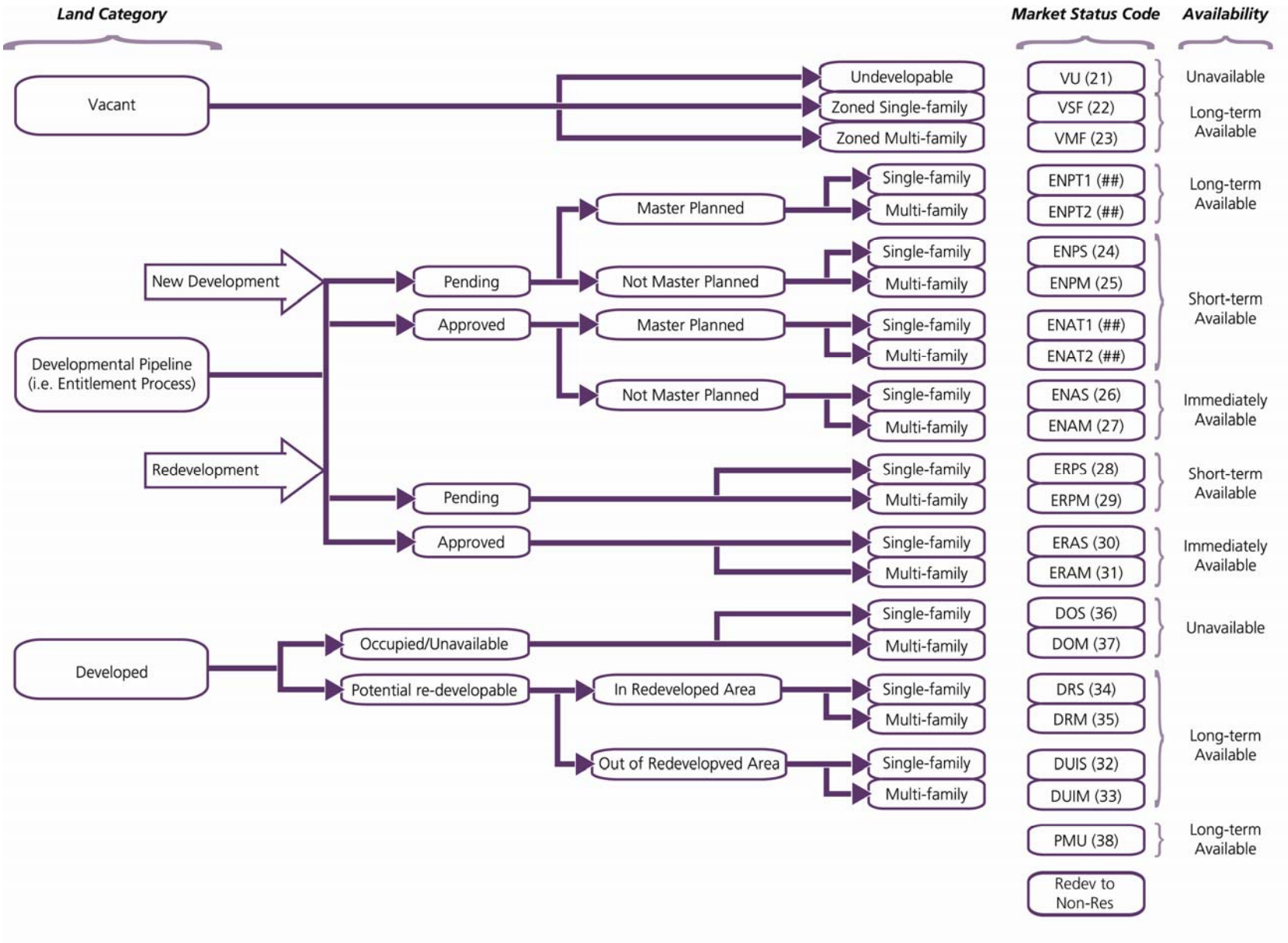
Below is a description of the market status codes used in the Residential Land Inventory.

: ***2009 Inventory of Residential Land–Market Status Code Definitions***
(Additional clarification on terminology can be found in the Glossary of Terms, located in Appendix D)

Land Use Code	Definition	
Vacant Land–Unavailable and Long-Term Available		
VSF	Vacant, Single-Family *Long-Term Available*	Vacant greenfield land that is planned or zoned for single-family development.
VMF	Vacant, Multifamily *Long-Term Available*	Vacant greenfield land that is planned or zoned for multifamily development.
Development Pipeline–Immediately, Short-Term, and Long-Term Available		
ENPS	Entitlement, New Development, Pending, Single-Family *Short-Term Available*	Formerly vacant parcels in the pending phases of development for single-family units.
ENPM	Entitlement, New Development, Pending, Multifamily *Short-Term Available*	Formerly vacant parcels in the pending phases of development for multifamily units.
ENPT1	Entitlement, New Development, Pending, Master Plan, Single-Family *Long-Term Available*	Formerly vacant parcels that are now part of a Master Plan and are in the pending phases of development. Plans indicate that the units will be developed as single-family units.
ENPT2	Entitlement, New Development, Pending, Master Plan, Multifamily *Long-Term Available*	Formerly vacant parcels that are now part of a Master Plan and are in the pending phases of development. Plans indicate that the units will be developed as multifamily units.
ENAS	Entitlement, New Development, Approved, Single-Family *Immediately Available*	Formerly vacant parcels in the approval phases of development for single-family units.
ENAM	Entitlement, New Development, Approved, Multifamily *Immediately Available*	Formerly vacant parcels in the approval phases of development for multifamily units.
ENAT1	Entitlement, New Development Approved, Master Plan, Single-Family *Short-Term Available*	Formerly vacant parcels that are now part of a Master Plan and are in the approval phases of development. Plans indicate that the units will be developed as single-family units.
ENAT2	Entitlement, New Development Approved, Master Plan, Multifamily *Short-Term Available*	Formerly vacant parcels that are now part of a Master Plan and are in the approval phases of development. Plans indicate that the units will be developed as multifamily units.
ERPS	Entitlement, Redevelopment Pending, Single-Family *Short-Term Available*	Single-family parcels in the pending phases of redevelopment.
ERPM	Entitlement, Redevelopment Pending, Multifamily *Short-Term Available*	Multifamily parcels in the pending phases of redevelopment.

Land Use Code	Definition	
ERAS	Entitlement, Redevelopment Approved, Single-Family *Immediately Available*	Single-family parcels in the approval phases of redevelopment.
ERAM	Entitlement, Redevelopment Approved, Multifamily *Immediately Available*	Multifamily parcels in the approval phases of redevelopment.
Developed Land–Unavailable and Long-Term Available		
DOS	Developed, Occupied/Unavailable, Single-Family *Unavailable*	Residential parcels that possess identical current land use and planned land use codes, are currently built, and are designated as single-family units.
DOM	Developed, Occupied/Unavailable, Multifamily *Unavailable*	Residential parcels that possess identical current land use and planned land use codes, are currently built, and are designated as multifamily units.
DRS	Developed, Redevelopment, Single-Family *Long-Term Available*	Parcels that possess current land use and planned land use codes that are different, are currently occupied, and are within a redevelopment area. The planned land use is for single-family development.
DRM	Developed, Redevelopment, Multifamily *Long-Term Available*	Parcels that possess current land use and planned land use codes that are different, are currently occupied, and are within a redevelopment area. The planned land use is for multifamily development.
DUIS	Developed, Underutilized/Infill, Single-Family *Long-Term Available*	Parcels that possess current land use and planned land use codes that are different (underutilized) or the same (infill), are currently occupied, and jurisdictions have indicated that redevelopment could occur. The planned land use is for single-family development.
DUIM	Developed, Underutilized/Infill, Multifamily *Long-Term Available*	Parcels that posses current land use and planned land use codes that are different (underutilized) or the same (infill), are currently occupied, and jurisdictions have indicated that redevelopment could occur. The planned land use is for multifamily development.
Mixed Use–Long-Term Available		
PMU	Planned Mixed-Use *Long-Term Available*	Parcels that are planned for mixed-use (commercial, including retail and residential) in the future. These parcels are candidates for development or redevelopment. Typically, areas of planned mixed-use are planned for multifamily housing and stipulate what types of commercial industries locate in the areas.
Other		
RNR	Redevelopment, Nonresidential	Land that is currently designated as residential, but has the opportunity to be re-used for nonresidential purposes in the future.

: ***Residential Land Inventory Codes Flowchart***



APPENDICES

A. PROJECT DESCRIPTION AND METHODOLOGY

A.1 Employment Land Inventory

SANDAG and the Task Force undertook a 3-step procedure to complete the employment land inventory and market status portion of the project. The goal of this procedure was the creation of an objective, up-to-date database and inventory of employment land (nonretail[8]) in the San Diego region. This database has provided SANDAG and the Task Force with a "snap-shot" overview of the region for the survey period. SANDAG has utilized this new database for comparison to its 2000 institutional land inventory to derive figures on absorption and development during the 9-year period. The three steps are outlined below:

1. ***Land Inventory/General Plan Status—***SANDAG has an inventory of all land in the region, including an inventory by current use and General Plan designation. The existing and planned use of land was displayed by parcel. SANDAG used this parcel level information to create a series of maps and databases. This General Plan information by parcel comprises the "institutional inventory" and was used as the basis for the second step, the market status or readiness analysis.

2. ***Market Status/Readiness by Community—***The SANDAG land inventory by parcel was mapped by Planning Area. The maps were distributed to professional developers and brokers knowledgeable about the market for employment land in each of the Planning Areas. These professionals were asked to classify the market status or readiness of selected parcels of land. A specialized classification and coding system established by the Task Force and SANDAG was utilized by the brokerage representatives to mark the specific market status or readiness of each individual parcel. The system is comprised of 11 market codes.

3. ***Reconciliation Process—***The professionals responsible for conducting the market analysis were asked to return to SANDAG to report their findings. To ensure accuracy, SANDAG staff reviewed the maps with the Task Force and provided maps to any jurisdiction or organization that requested a review. These revised maps were checked and updated if there were any previous data conflicts or if specific parcels were not attributed a market status code. Finally, after the maps were completed and rechecked by the Task Force, the final maps then were plotted.

SANDAG has used these maps to create an up-to-date Institutional Inventory of Employment Land. The new inventory provides some statistical comparisons with the original 2000 database, such as rates of absorption in each Planning Area. The results of these comparisons are included with each of the individual analyses for the plan areas in this report.

The following page shows an example of the process used in completing the most recent Employment Land Inventory.

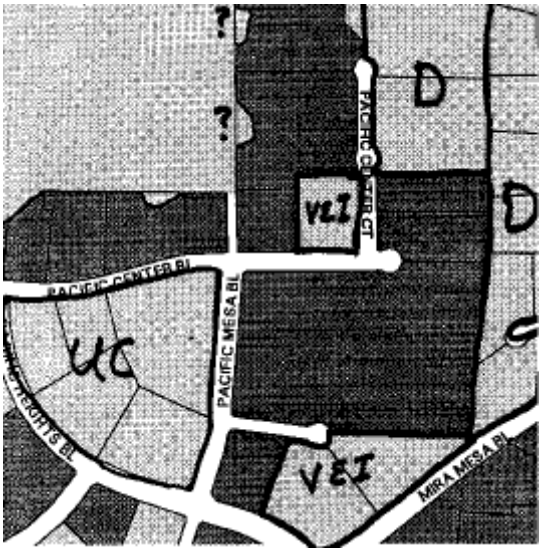
[8] Retail land was excluded from the inventory due to the absence of base-sector jobs in this sector.

: *SANDAG Land Inventory*
(Existing and Planned Land Use)

Institutional Inventory – Step 1

Poster-size color plots of land use with parcel boundaries were generated for each of the plan areas. Developed and vacant employment lands were displayed in contrasting colors. In the example, the dark shade represents developed lands. The light shade is vacant lands. The source for the land use plots is the SANDAG Land Layers Inventory. The Land Layers Inventory is maintained as part of the SANDAG series of Regional Growth Forecasts. The most recent effort is the Series 12 Regional Growth Forecast, still in progress at the time of publication.

: *Market Status*



Market Status – Step 2

Professional developers and brokers marked directly on the land use maps the market status code for each parcel or group of parcels. This information was entered into the Employment Land Inventory digital database.

Employment Land Inventory – Step 3

Local jurisdictions' staffs also were given the opportunity to review the land use maps. Their changes and updates were entered into the database. Report-size color plots were generated for this step. Some of these plots display only the areas of employment land rather than the entire Planning Area.

A.2 Residential Land Inventory

SANDAG and the Task Force similarly undertook a three-step procedure to complete the residential land inventory and market status portion of the project. The goal of this procedure was the creation of an objective, up-to-date database and inventory of residential land in the San Diego region. This database has provided SANDAG and the Task Force with a "snap-shot" overview of the region for the survey period. The three steps are outlined below:

1. ***Land Inventory/General Plan—***SANDAG has an inventory of all land in the region, including an inventory by current use and General Plan designation. This information periodically is updated through the SANDAG Regional Growth Forecast process, which was underway at the time of publication. The inputs provided by the region's local jurisdictions into the current Series 12 Regional Growth Forecast comprises the "institutional inventory" and was used as the basis for the second step, the market status or readiness analysis[9].

2. ***Market Status/Readiness by Community—***To obtain information about the market status or readiness of residential land, SANDAG obtained a proprietary database from MarketPointe Reality Advisors that tracks residential land that has entered the entitlement process, or development pipeline. SANDAG converted this data into parcel level information and joined it with the SANDAG Institutional Inventory to create a series of maps and databases. The land inventory by parcel then was mapped by Planning Area using a specialized classification and coding system established by the Task Force and SANDAG that reflects the specific market status or readiness of each individual parcel. The system is comprised of 23 market codes. It should be noted that this process was considerably more mechanized than that of the Employment Land Inventory.

3. ***Reconciliation Process—***To ensure accuracy, SANDAG staff reviewed the maps with the Task Force and provided maps to any jurisdiction or organization that requested a review. These revised maps were checked and updated if there were any data conflicts or if specific parcels were not attributed a market code. Finally, after the maps were completed and rechecked by the Task Force, the final maps then were plotted.

SANDAG has used these maps to create an up-to-date Institutional Inventory of Residential Land.

[9] This report reflects inputs by local jurisdictions into the Series 12 Growth Forecast prior to June 25, 2009. As the Forecast was ongoing at the time of this report's publication, the results should not be compared.

B. PRODUCTS

Three products have been developed from the Employment and Residential Land Inventory and Market Analysis project. These products provide the foundation for an ongoing partnership to maintain up-to-date information regarding the market availability of employment and residential land in the San Diego region.

1. ***Parcel-Level Database—***SANDAG has created an up-to-date inventory of the market status of employment and residential land for selected Planning Areas within the San Diego region. As stated previously, Planning Areas are defined as the County and City of San Diego community Planning Areas, and the city or sphere of influence boundary for the 17 other incorporated cities in the region. Employment land includes land designated for light and heavy industry, warehousing and public storage, marine terminals, wholesale trade, or land planned for office use in the local jurisdiction's General/Community Plan land use elements. Residential Land includes land designated for single- and multifamily residential, mobile home parks, single room occupancy units, or spaced rural residential uses in the local jurisdiction's General/Community Plan land use elements.

2. ***Market Analysis and Classification—***SANDAG's most recent inventory of employment and residential land specifically was classified to reflect each parcel's market status. Both the employment and residential land is classified based on a market analysis coding system. These classifications are assigned using professional knowledge for employment land and a proprietary database for residential land. The report includes detailed maps and acreage tables of vacant and developed employment land by Planning Area in the San Diego region, as well as residential land that is vacant, developed, or in the development pipeline. The maps and tables categorize each parcel of land based on the market analysis codes. Summaries of the selected Planning Areas are provided.

3. ***Regional Economic Development Information (REDI) System—***This interactive mapping and analysis tool will allow for the display and analysis of the most recent Inventory and Market Classification of Employment and Residential Land, as well as other appropriate parcel level data from the Assessor Master Property Record file and the SANDAG Land Use Inventory. Functionality would include zoom in, zoom out, pan, viewing of different map layers (such as the vacant employment land, jurisdiction boundaries, roads, etc.), and querying of individual parcel information. Additionally, the ability to send a "geographic e-mail" will be incorporated to allow users to send information to assist in updating the market analysis codes for individual parcels. SANDAG will maintain this interactive tool on its Web site at http://redi.sandag.org.

C. DATA LIMITATIONS

: ***Net vs. Gross employment acres—***For this inventory, employment land acres were calculated on a gross basis. Net developable acres were calculated as a range of 62 percent to 75 percent was applied. This method was agreed upon by the Task Force. To keep the inventory consistent, gross acres were used for each of the selected Planning Areas.

: ***Agreement with the Series 12 Regional Growth Forecast—***At the time of publication, the SANDAG Series 12 Regional Growth Forecast was in progress. Much of the base information in this report reflects the inputs provided to SANDAG for the Forecast by each of the region's jurisdictions, through June 25, 2009. These inputs include General Plan changes, updates on the development status of parcels of all land use types, and the likelihood of redevelopment on specific parcels, among other detailed information. Since the Series 12 Forecast was nearing completion but not yet finalized, there may be discrepancies between the Forecast and the Employment and Residential Land Inventory and Market Analysis study and the two should not be compared.

It is important to note that the estimate of future potential residential units shown in Tables 5, 6, and 7 is a point-in-time estimate of residential capacity based on the inventory of units as of January 1, 2008 and the most current General Plans of jurisdictions. These numbers are derived, in part, from the July 2009 draft of the SANDAG Series 12 Forecast database. The data are compiled from a variety of sources including County Assessor records, aerial imagery, existing General Plans and policies, and constraints to development (such as habitat preserves, steep slopes, floodplains, and existing buildings and infrastructure), as well as economic information about the real estate market. The General Plans that form the basis for the inventory are plans that are updated regularly, and thus it stands to reason that the number of units built in the future may differ from the estimate published today. For example, within the San Diego region roughly half of the cities and the County are working on general or specific plan updates, or will do so in the next five years. These plan changes, and the resulting changes to future housing potential, will be reflected in future forecast updates.

Thus, while the number of potential residential units in this report may reflect a wide range of capacity, the focus should remain less on the perceived finality of the unit numbers, and more on the region's continuing efforts to provide a diverse set of housing types and its desire to direct development into areas where the region wants it to occur.

: ***Redevelopment/Re-Use/Infill—***As redevelopment continues to emerge as a tool for creating capacity, it was important to include it in this study. Both residential and employment potential redevelopment parcels were identified by the inputs provided to SANDAG staff by the local jurisdictions through the Series 12 Forecast process. Additional employment redevelopment parcels were identified by the development professionals while coding the land use maps (the process outlined in the Project Description and Methodology section of this report). All potential redevelopment parcels identified in the current Employment and Residential Land Inventory are categorized as Long-Term Available (could take three years or more to develop).

: ***Whole parcels—***The primary unit of data collection and storage is the parcel. Often a parcel may have multiple land uses and/or market statuses. For ease of data development and maintenance, SANDAG staff avoided splitting parcels when the splits resulted in very small portions (less than one acre). The predominant land use and/or market status was assigned in these cases.

: ***Multiple-polygon parcels—***A few parcels are stored in the database as multiple polygons. An easement or road right-of-way can split a parcel. Each of the resulting portions of the parcel may retain the original assessor parcel number. Some statistics report the number of parcels or contiguous parcels when in actuality the number represents parcel polygons. This is a rare occurrence and was disregarded for this report.

: ***Parcels without an assessor parcel number—***Some polygons in the San Diego Geographic Information Source (SanGIS) parcel layer were not assigned an assessor parcel number (APN). This is not a limitation for this report, but could be problematic when analyzing other data by APN.

: ***Data collection time period/Timeliness—***The data collection took place during calendar year 2008. During this time, changes in market status may have occurred that will not be reflected in this inventory. However, through the interactive Web-application, REDI, SANDAG periodically will update the status of parcels. This information will be obtained from the County of San Diego Assessor's Office through the SanGIS.

D. GLOSSARY OF TERMS

(as they pertain to the 2009 Employment and Residential Land Inventory)

D.1 Employment Land Inventory Codes

Coastal Area—Includes the cities of Oceanside, Encinitas, Carlsbad, Solana Beach, Del Mar, Chula Vista, National City, Coronado, and Imperial Beach; and City of San Diego Planning Areas: Torrey Pines, University, La Jolla, Mission Beach, Mission Bay Park, Pacific Beach, Ocean Beach, Peninsula, Lindbergh Field, Centre City, Barrio Logan, 32nd Naval Station, Otay Mesa-Nestor, and Harbor.

Entitlement—The right to develop a parcel or parcels of land with government approval. Entitlements are land use designation, approved density, improvements, such as utilities, streets, and other infrastructure, and discretionary permits have been issued.

Immediately Available—Parcels that could be developed in less than one year.

Infrastructure Improvements—The installation and completion of roads, water mains, electricity lines, and other utilities, including preparing pads and installing hook ups. These are on- and off-site improvements needed before development of a parcel or parcels can begin.

Long-Term Available—Parcels that may take longer than three years to develop.

Net Change—Net change reflects the sum of the vacant acres added and absorbed over the period. Acres could be absorbed when employment land is developed for any type of use or if employment land is rezoned to a nonemployment use, for example. Acres that may have been reflected as employment in 2000 that have since been recognized as mixed use also are not captured as employment land in 2009, as the Task Force determined that mixed-use parcels should be reflected in the Residential Land Inventory. Absorbed acres do not include planned or proposed parcels. Employment acres could be added when nonemployment land is rezoned for employment uses, for example.

Net Developable Acres—A range of 62 percent to 75 percent was applied to the "Developable 2009 Employment Acres" to obtain net figures.

Planned—Building plans and permits have been issued but construction has yet to begin. Multiphase projects also are included where some phases have been built but other segments have yet to begin.

Proposed—Vacant employment land with entitlements and plans to build, including (at a minimum) a conceptual site plan. Permit applications have been submitted to the local jurisdiction but have not yet been approved.

Redevelopment Area—A boundary area set by local jurisdictions where redevelopment can take place, usually providing subsidies, tax benefits, and incentives to encourage redevelopment.

Short-Term Available—Parcels that may take between one and three years to develop.

***Unmarketable*—**Parcels that have environmental, physical geographic or other legal constraints that prevents them from being developed. Such constrains could be steep slopes or flood plains.

***Vacant*—**Parcels that are not developed, are not under construction, and do not have any plans for development.

D.2 Residential Land Inventory Codes

***Approved*—**Includes the Final Map and Final Approval designations of the Land*Tracker* database. Final map has been or will soon be officially recorded and the selling of parcels can begin.

***Development Pipeline*—**Projects in the Development Pipeline[10] are parcels of land for which a party has entered into the land entitlement process. These projects are considered to be actively engaged in becoming developed and are considered available to create residential capacity in the immediate and short term.

***Final Approval*—**A Land*Tracker* designation reflecting that a project's final map has been approved by the city council, infrastructure improvements have been completed, and the land, once recorded, can be sold.

***Final Map*—**A Land*Tracker* designation reflecting that a project's final map has been recorded by the county recorder's office.

***Greenfield*—**Vacant land that has not been developed, improved, or entitled.

***Immediately Available*—**Parcels that could be developed in less than one year.

***Infill*—**Parcels that have the same current and planned residential land uses, but that jurisdictions have indicated will be redeveloped.

***Infrastructure Improvements*—**The installation and completion of roads, water mains, electricity lines, and other utilities including preparing pads and installing hook ups. These are on- and off-site improvements needed before construction on a parcel or parcels can begin.

***Long-Term Available*—**Parcels that may take longer than three years to develop.

***Master Plan Community*—**A large residential community, typically requiring the subdivision of large tracts of land, and often with homes built by several different builders. Master Plan communities usually include community centers, pools, and other recreational facilities.

[10] Projects are in the developmental pipeline when they are recorded in the MarketPointe Land*Tracker* database, available from MarketPointe Realty Advisors.

***Multi-family*—**Includes apartments and higher density condominium developments (in general, more than 12 units per acre), "for rent" Single Room Occupancy units, and mobile home parks with ten or more spaces that are primarily for residential use. Multi-family can be reflected by the aggregation of SANDAG land-use definitions[11] for codes 1200 (Multi-Family Residential), 1280 (Single Room Occupancy Units), and 1300 (Mobile Home Park).

***New Development*—**New development reflects projects in the Developmental Pipeline that previously were vacant land. This type of development often is called "greenfield" development.

***Pending*—**Includes the Planning, Specific Plan, and Tentative Approval designations of the Land*Tracker* database. Multiphase projects also are included where some phases have been built but other segments have yet to begin.

***Planned Mixed-Use*—**Denotes that a single parcel is planned for both commercial and residential uses. The Planned Mixed-Use category is comprised of SANDAG land use definition 9700 (Mixed Use).

***Planning*—**A Land*Tracker* designation reflecting that a project is under planning review by the jurisdiction; no approvals have been granted.

***Redevelopment Area*—**A boundary area set by local jurisdictions where redevelopment will take place, usually providing subsidies, tax benefits, and incentives to encourage redevelopment.

***Short-Term Available*—**Parcels that may take between one and three years to develop.

***Single-family*—**Includes single-family detached units on lots smaller than one acre, single-family attached units including duplexes, townhouses and lower density condominium developments (in general, less than or equal to 12 units per acre), and single family units located in rural areas with lot sizes greater than one acre. Single-family can be reflected by the aggregation of SANDAG land-use definitions for codes 1000 (Spaced Rural Residential), 1110 (Single-family Detached), 1120 (Single-family Multiple Units), and partial-8000 (Agriculture, with at least one dwelling unit).

***Specific Plan*—**A Land*Tracker* designation reflecting that a project has a specific plan in place that describes the allowable land uses, identifies open space, and details the availability of facilities and financing.

***Tentative Approval*—**A Land*Tracker* designation reflecting that a project has Tentative Map approval from a planning commission or city council. The builder must install improvements, such as streets, drainage facilities, or sewer lines to serve the parcel before final approval.

***Unavailable*—**Parcels that are unavailable for development or redevelopment.

***Underutilized*—**Parcels that have different current and planned residential land uses and that jurisdictions have indicated will be redeveloped. The parcel does not meet the maximum allowable density according to zoning regulations.

[11] SANDAG land-use definitions available at: http://www.sandag.org/resources/maps_and_gis/gis_downloads/downloads/codes/Land_Use_Definitions.html.

***Undevelopable*—**Parcels with physical, environmental, geographic, legal, or other constraints that prevents them from being developed. Such constraints could be steep slopes or flood plains, among others.

***Vacant*—**Parcels that are not developed and are not under construction and do not have any plans for development. Vacant land can be reflected by the aggregation of SANDAG land-use definitions for codes 9101 (Vacant and Undeveloped Land), 8001 (Orchard or Vineyard), 8002 (Intensive Agriculture), 8003 (Field *Crops*), 2201 (Extractive Industry), 2301 (Junkyard/Dump/Landfill), 4114 (Parking Lot – Surface), and 7204 (Golf Course) where the recorded planned land use designates future residential development.

D.3 Other

***Check Plot*—**Working plot displaying employment land data. Used to review and comment on data stored in the digital database.

***Clusters*—**Groups of complementary, competing, and interdependent industries that drive wealth creation in a region, primarily through the export of goods and services.

***Constraints*—**Physical or environmental features that preclude development on vacant land. Common examples include steep slopes, wetlands, and publicly owned land. Constraints are determined by local policy.

***Contiguous Area*—**Adjacent parcels with the same market status code.

***Employment Land*—**Employment land includes land designated for light and heavy industry, warehousing and public storage, marine terminals, wholesale trade, or land planned for office use in the local jurisdiction's General/Community Plan land use elements.

***Geographic Information System (GIS)*—**An organized collection of computer hardware, software, geographic data, and personnel designed to efficiently capture, store, update, manipulate, analyze, and display all forms of geographically referenced information.

***Gross Acres*—**The total number of acres of a given land use. All acreage in this report are gross acres unless noted otherwise.

***Institutional Inventory*—**Inventory of employment and residential land by current use and General Plan designation.

***Land Layers*—**Individual land layers provide information about the location of facilities, such as colleges and universities, employment sites, industrial parks, landfills, large private employers, office buildings, and tourist attractions. Other digital land files provide "land cover" information, such as digital orthophotos (aerial photos), existing and planned land use, land ownership, and vacant developable land.

***Market Status*—**The readiness for development of a parcel as defined by the Employment and Residential Land Task Force.

Parcel—A tract or plot of land. Parcels in the employment and residential land digital database were extracted from the parcel layer maintained by the County of San Diego Assessor's Office through the San Diego Geographic Information Source (SanGIS). Original sources include assessor map pages, subdivision and other recorded maps, and San Diego Gas & Electric (SDG&E) base maps.

Planning Areas—Planning Areas refer to the City and County of San Diego's Community Planning Areas, as well as City Boundaries or Sphere of Influence Areas.

Plot—Computer-generated map, generally poster size.

Readiness—The status of when or if development can occur on an individual parcel.

REDI—The Regional Economic Development Information System. An interactive mapping and analysis tool that will allow for the display and analysis of the inventory and market classification of employment and residential land.

Residential Land—Residential land includes land designated for single- and multifamily residential, mobile home parks, single room occupancy units, or spaced rural residential uses in the local jurisdiction's General/ Community Plan land use elements.

Sphere of Influence—Sphere of Influence areas are unincorporated areas adjacent to city boundaries for which eventual incorporation to that city generally is assumed.