PLAT MONITORING PROGRAM

RESIDENTIAL PLATTING IN DEVELOPING COMMUNITIES IN THE TWIN CITIES REGION, 2024

METROPOLITAN COUNCIL

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The Metropolitan Council is the regional planning organization for the seven-county Twin Cities area. The Council operates the regional bus and rail system, collects and treats wastewater, coordinates regional water resources, plans and helps fund regional parks, and administers federal funds that provide housing opportunities for low- and moderate-income individuals and families. The 17-member Council board is appointed by and serves at the pleasure of the governor.

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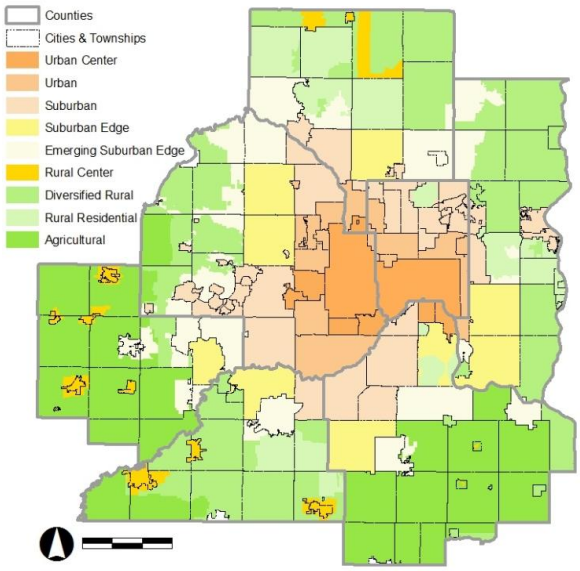
About the Program

The Plat Monitoring Program (Program) tracks and monitors sewered residential development in 45 cities in the region, mostly located within areas designated as “Suburban Edge,” “Emerging Suburban Edge,” and “Rural Center” in Thrive MSP 2040 (Figure 1), the metropolitan area’s development guide during the 2024 reporting year. The objective of the Program is to measure local implementation of Council policy by providing an annual report on sewered residential development in these cities, including the average density, the mix of new sewered residential development, the number of units platted, the amount of land developed, land utilization, and lot absorption rates. This data creates a baseline for land supply and tracks the housing mix and density of new residential developments. Twelve cities participated in the pilot Program in 2001, reporting on sewered residential plats approved in 2000. This pilot Program focused on cities with the corresponding designations of “Developing” and “Rural Center” in the 2030 Regional Development Framework (Figure 2). The Program subsequently expanded to cover more cities as the Twin Cities region developed.

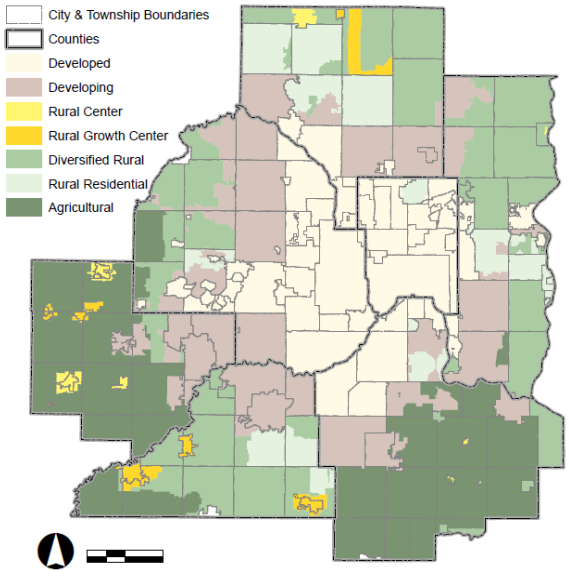
Figure 1. Thrive MSP 2040



The Program provides baseline data on residential development trends in participating cities and was designed to help answer the following questions:

- Is residential development consistent with Metropolitan Council policies?
- How are cities accommodating residential development in comparison to their local comprehensive land use plans?
- What is the mix of housing types that cities approve each year (single family vs. multi-family)?
- How is residential land being developed within the Metropolitan Urban Service Area (MUSA)?
- What is the lot absorption rate for residential plats in the region?

Figure 2. 2030 Regional Development Framework



Since 2001, the Council annually reports on residential development in participating cities using data collected through the Program. The Program assists cities and the Council in assessing a city’s consistency with the Council’s residential density policy, which requires sewered residential development to occur at a minimum density of 3 to 5 units per net developable acre for cities with the Suburban Edge, Emerging Suburban Edge, and Rural Center designations. By maintaining a record of approved sewered subdivisions, the Council and metropolitan communities can evaluate the success of participating cities in implementing the density policy and the extent to which the wastewater treatment system is being used efficiently. In addition, participating cities receive credit for residential plats meeting the Council’s density policy and gain increased development flexibility within the MUSA by approving plats that exceed the minimum density. For example, if

a participating city has demonstrated through the Program that its actual platted development pattern exceeds the required minimum planned density of 3 units per net residential acre, a city may approve land uses with lower residential densities so long as the overall net density for the city remains above the minimum. In this way, the credit from participation in the Program is crucial information in reviewing comprehensive plan updates and amendments to provide more flexibility for cities when they consider developments at a variety of densities.

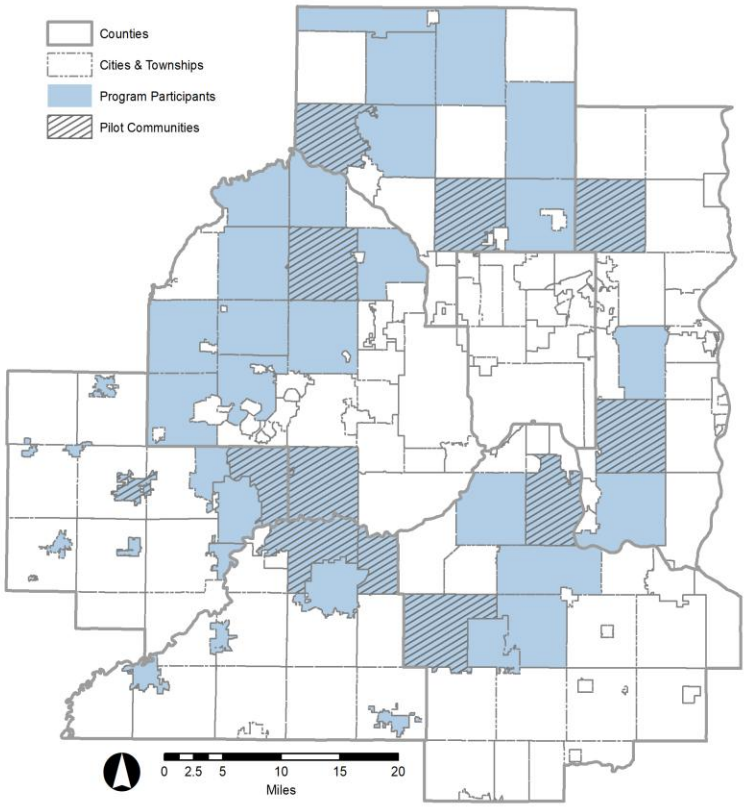
History of Program Participants

In 2001, the Metropolitan Council initiated the Plat Monitoring Program with input from the Builders Association of the Twin Cities (BATC), currently known as Housing First Minnesota, and Metro Cities (formerly the Association of Metropolitan Municipalities). Participating cities complete an annual summary worksheet and submit copies of plats approved during the calendar year.

The initial 12 volunteer cities were Blaine, Chanhassen, Eden Prairie, Hugo, Inver Grove Heights, Lakeville, Maple Grove, Ramsey, Savage, Shakopee, Waconia, and Woodbury. In 2002, the City of Farmington was added to the Program. As conditions of amendments to expand Metropolitan Urban Service Area (MUSA), Empire Township (now the City of Empire) and the Cities of Andover, Lino Lakes, Medina, Minnetrista, Rogers, Rosemount, and Victoria were added to the Program in 2003. The City of Brooklyn Park was required to report sewered residential plats starting with 2006 plats as a condition of a land use amendment. In 2007, the Cities of Cottage Grove and Orono were required to join the Program as conditions of comprehensive plan amendment requests, and the City of Eagan voluntarily joined the Program.

In 2008, as a part of the decennial review of comprehensive plan updates, the Cities of East Bethel, Mayer, and New Germany were added to the Program. Subsequently, another 18 communities, including a number of cities designated as “Rural Center,” joined the Program as part of the decennial review of their 2030 comprehensive plan updates. These were the Cities of Belle Plaine, Carver, Chaska, Cologne, Columbus, Corcoran, Dayton, Elko New Market, Independence, Jordan, Mayer, Norwood Young America, Nowthen, Oak Grove, Plymouth, Prior Lake, St. Francis, and Watertown. The City of Lake Elmo also joined the Program in 2013. In 2015, the City of Nowthen was dropped from the Program due to the Council ending its plans for long-term sanitary sewer extension in the community.

Figure 3. 2024 Program Participants



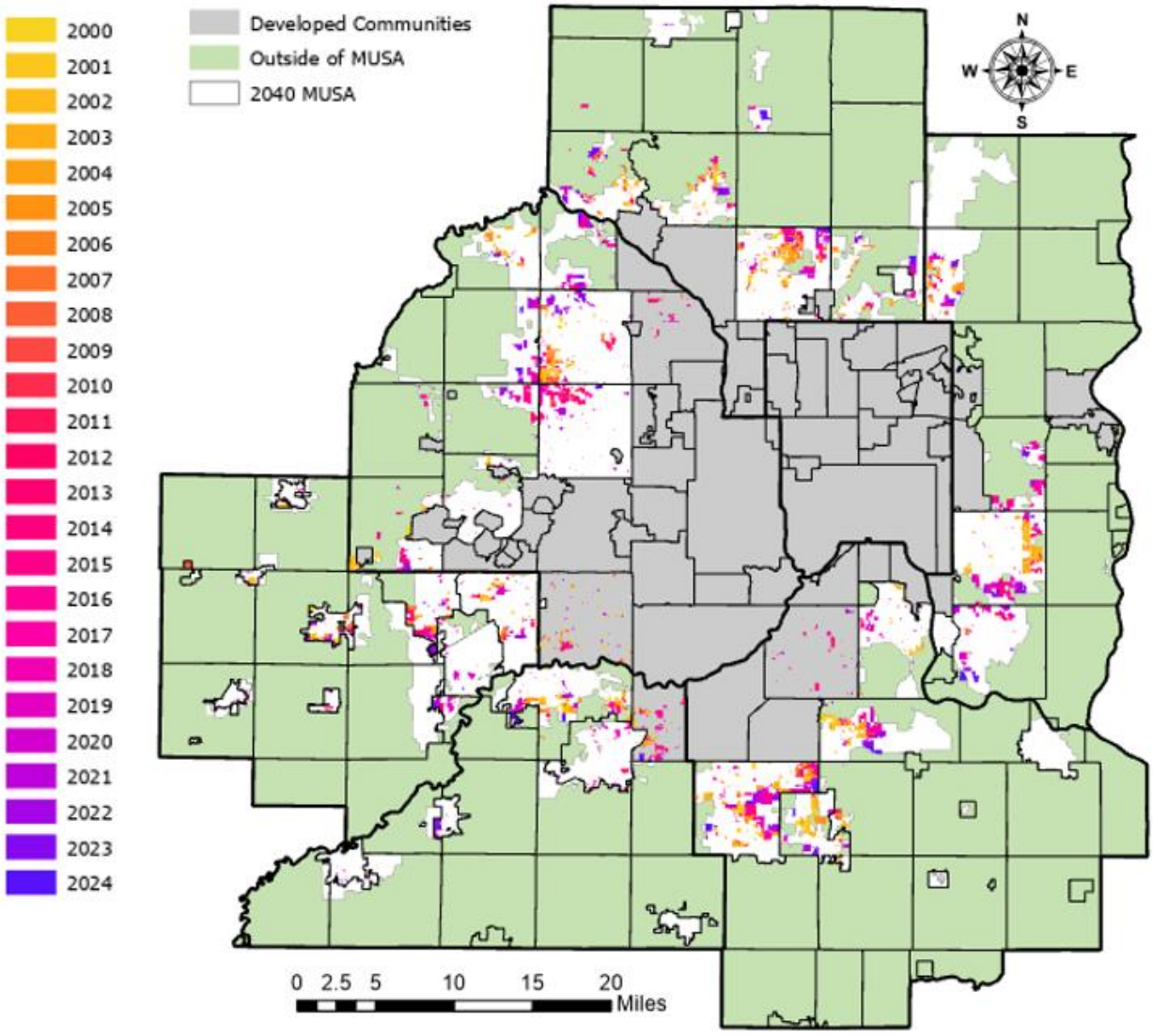
Analysis

This report analyzes sewered residential development in 45 cities (see Figure 3). It provides an overview of platting activity from the previous year and compares it to past trends based on data submitted since the inception of the Program.

From 2000 to 2024, participating cities have reported an average of 115 plats a year. This year, the Council received data on 103 residential plats from 42 of the 45 participating cities. Of the 42 cities that submitted data, 38 reported five or fewer plats, including 14 that reported no new plats. Only 4 cities reported six or more plats, with no city reporting more than 10 plats.

Figure 4 shows all the plats approved in the participating cities between 2000 and 2024 by year. Areas shown in gray are cities with the designations of Urban Center, Urban, and Suburban in Thrive MSP 2040, which correspond to the Developed Communities category in the previous development guide, the 2030 Regional Development Framework. Areas in light green are rural and agricultural areas which are not within MUSA and are mostly not part of the Plat Monitoring Program. The remaining cities are those that are part of the Program and have been approving plats within the sewered areas. Except for the Suburban cities of Brooklyn Park, Eagan, Eden Prairie, and Savage, most participating cities are designated as Suburban Edge, Emerging Suburban Edge, or Rural Center.

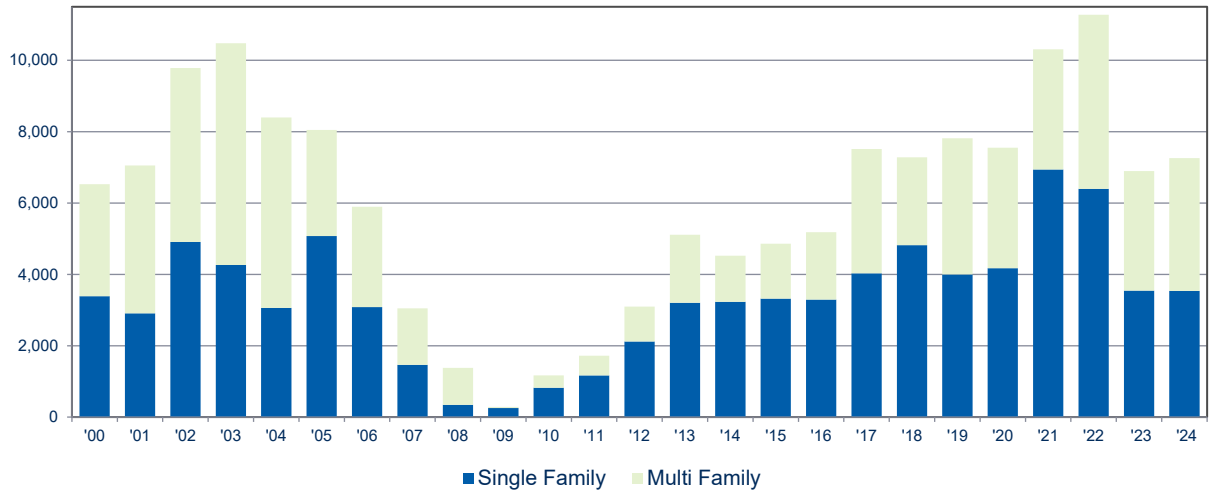
Figure 4. Platting Activity by Year in the 7-County Region



Total housing units and housing mix

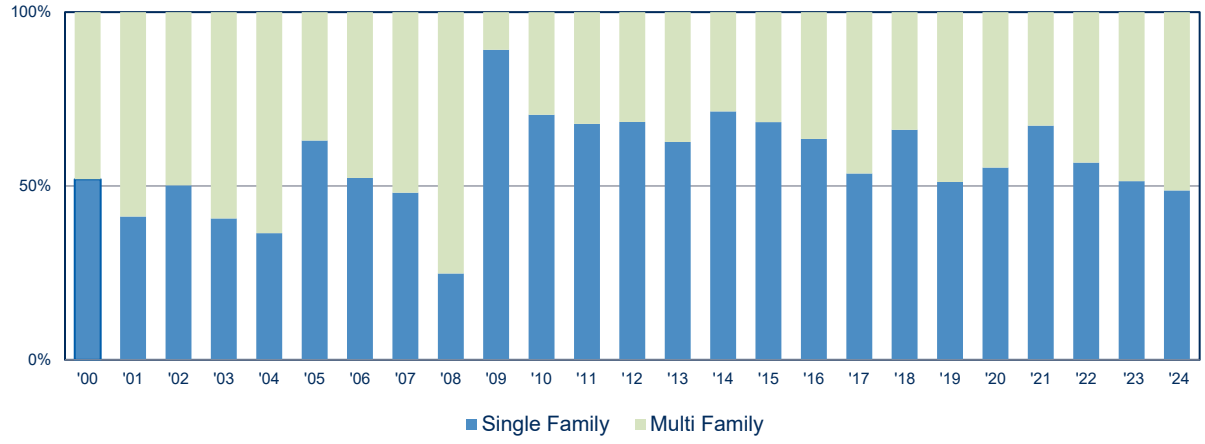
From 2000 to 2024, participant cities recorded an average of 6,098 total single-family and multi-family housing units each year; however, there is a great deal of variation within the reporting period with a low of 286 housing units platted in 2009 and a high of 11,278 housing units platted in 2022. In 2024, 7,260 housing units were platted. This is an increase from the 6,896 units platted last year and roughly in line with the range in the number of housing units platted that was observed between 2017 and 2020. It is likely that the spike of 10,306 and 11,287 units respectively platted in 2021 and 2022 were outlying values with the last two years total representing a return to more typical development activity.

Figure 5. Total Units Platted, 2000-2024



In 2024, 51.3% of the platted units were multi-family (3,724 units) and 48.7% of the platted units were single-family (3,536 units), which continues last year's trend of an increased share of multi-family units from the historic 45% multi-family and 55% single family split observed since the inception of the Program. Comparing 2024 to 2023, multi-family units represent a slightly greater share of the total housing units (up 2.7% from last year's 48.6%). Figure 6 shows the variation in the housing mix over time.

Figure 6. Housing Mix, 2000-2024



Consistency with local comprehensive plans

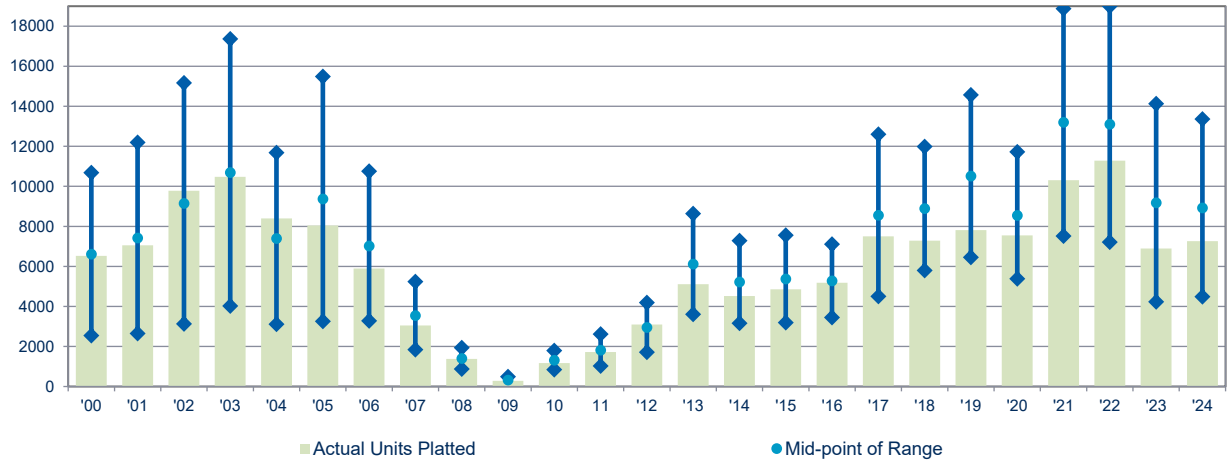
Every year since the start of the Program, participating cities have approved plats that are consistent with the guided densities in their local comprehensive plans. The allowable density in each residential area of the city is a set range (e.g., 2 to 6 units per acre) determined by the guiding land use assigned to a property in the local comprehensive plan. The Council evaluates consistency with local comprehensive plans by checking whether the actual number of units platted is within the range allowed by the established land use. This check occurs both when plats are submitted to the Program and prior to the issuance of sewer extension permits. The minimum of this range is the total number of units that would be created if the land was developed at the lowest end of the density range. Likewise, the maximum of this range is the total number of units that would be created if the land was developed at the highest end of the density range. Table 1 shows the lowest allowable units, highest allowable units, and actual units platted in 2024.

Table 1. Allowable Units and Actual Units Platted in 2024

Lowest Allowable Units	4,253
Highest Allowable Units	12,658
Actual Units Platted	7,260

As shown in Figure 7 below, the total number of actual units platted in 2024 by all participating cities is within the range of allowable units and under the midpoint of the range (8,456). During the period from 2000 to 2016, the total number of actual units platted each year generally fell near the midpoint of the range, excepting the period from 2005 to 2007 where the total number of units platted was below the midpoint. Starting in 2017, the total number of actual units platted has consistently been below the midpoint of the allowable units. This indicated that for the past eight years cities have been reporting more plats with net densities closer to the minimum of the density range than the maximum.

Figure 7. Planned and Actual Units

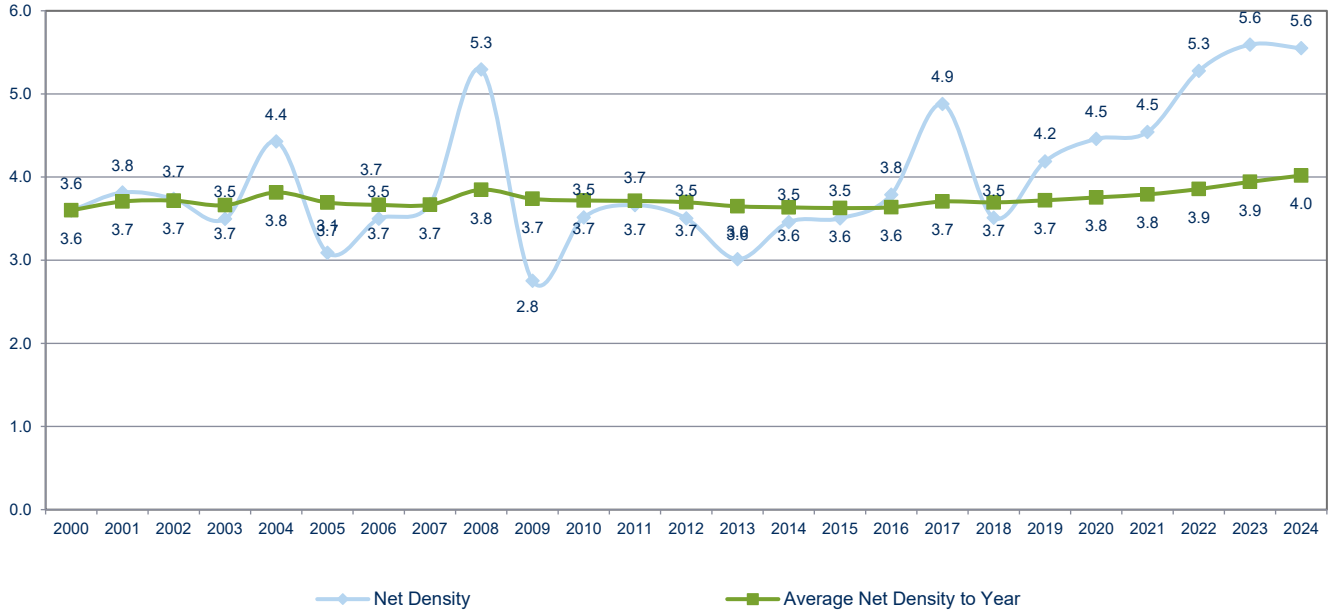


Overall density and Council policy

Thrive MSP 2040 and Council policies require Suburban Edge, Emerging Suburban Edge, and Rural Center communities to develop at an average density of at least 3 units per acre. The Council uses the Plat Monitoring Program to monitor whether platting activity on the developing edge is consistent with this policy. The average net density of all plats recorded between 2000 and 2024 is 3.98 units per acre. Additionally, Program participants have collectively platted sewered residential developments at or above 3 units per acre each year of the program, with the exception of 2009 when the recorded annual average density was 2.8 units per acre (Figure 8).

Since 2009, the overall annual average net density of recorded plats has generally increased despite year-to-year fluctuations. In 2024, participant cities reported an overall average net density of 5.5 units per acre, slightly below the recorded peak of 5.6 units per acre in 2023. In 2024, four cities reported annual platted net densities below 3 units per acre: Blaine, Chaska, East Bethel, and Maple Grove. This does not include communities that did not approve residential plats in 2024 nor the communities that did not submit data for 2024. It should be noted that periodic reporting of annual platted net densities below 3 units per acre is to be expected. A city's overall average is much more important than its annual total. For example, in 2023, Chanhassen reported an annual platted net density of 1.66 units per acre, just over half of the required 3 unit per acre minimum average; however, in 2024, they reported an annual platted net density of 36.82 units per acre, over 12 times the required minimum. Both of these numbers taken in isolation do not accurately represent the City's development trends, which is why we use the Program average, in this case 4.98 units per acre, to determine if a community is meeting policy goals.

Figure 8. Average Net Density to Year, 2000-2024



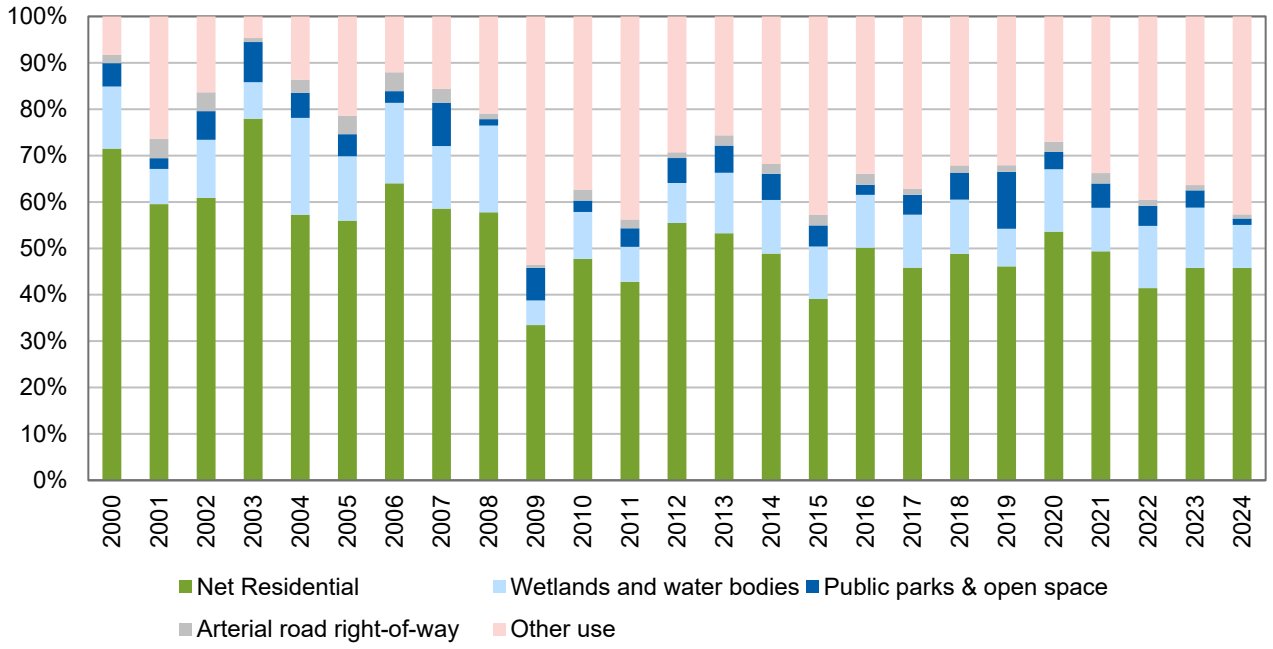
Land utilization

The net developable acres in each plat are calculated based on an analysis of land cover and land uses on that property. Wetlands, natural bodies of water, publicly owned park and open space, arterial road rights-of-way, and land set aside for future development are subtracted from the gross residential acres to determine the net residential area. Cities are encouraged to efficiently utilize buildable land during development to achieve or exceed the minimum required average net residential density of 3 units per acre.

Figure 9 shows the breakdown of land consumption from 2000 to 2024. The year 2009 marks the lowest percentage of platted land used for residential development and the highest percentage of land reserved for future development, which is not surprising given that 2009 coincides with the depths of the economic downturn. With decreased housing demand and the economic crisis, about a third of gross residential acres was reserved for future development as outlots ("Other use" in Figure 9). While the share of net residential acreage has increased since 2009, developments post-recession have

typically hovered between 40 and 50 percent net residential acres, compared to the 60 to 70 percent net residential acres that was common before the recession. In 2024, net developable acres made up 46% of total platted land, which is the same as 2023 (46%) and average for platting activity in the past 10 years (also 46%). The percentage of platted land used for the other categories has been fairly consistent over the last decade with wetlands and waterbodies around 11%, arterial right-of-way around 2%, and public parks and open space around 5%. The 2024 breakdown has a smaller percentage of wetlands and waterbodies (9%) and parks and public open space (1%) than is typically observed and a larger percentage of land reserved for future development (43%) than the decade's 36% average.

Figure 9. Land Use Consumption by Use



From a plat to permit

While analyzing platting activity is a valuable part of understanding development patterns in the region, plats are only one step of the development process. For a residential plat to create housing units, building permits need to be issued by the local authority.

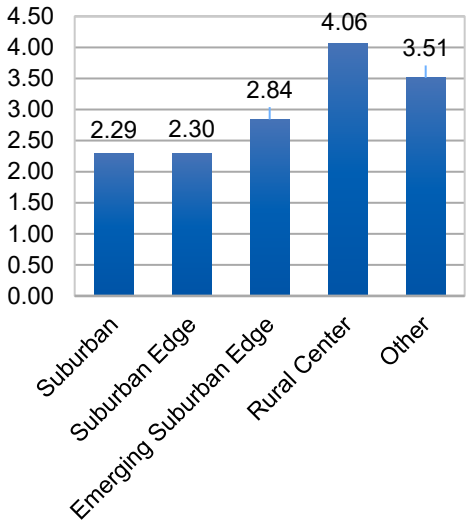
The Council's Research department collects annual residential permitting data from around the region. Overlaying plat data with permit information reveals the amount of time that it takes from the initial platting of a lot to the issuance of a building permit. Development can be platted and housing units permitted in the same year or it can take decades before a given unit is constructed. This timeframe, often referred to as lot absorption, can vary based on a variety of factors, most importantly economic stability and housing demand. Since the geocoded permit data only goes back to 2009, the analysis only includes plats permitted in the last 15 years (2009-2024). Tracking this information can help inform growth patterns, land capacity, forecasting, and permitting processes.

As was mentioned earlier, there are a wide range of lot absorption rates with some permits issued the same year the plat was approved (indicated by zero) and others taking over 20 years. Overall, it takes an average of 2.55 years for the platted lots in participating cities to receive building permits. There is a lot of variation within and between individual plats as many factors (desirability of individual lots,

product type, builder size, amount of infrastructure/grading associated with the plat, etc.) can all impact how long it takes between recording a plat and a developer applying for building permits.

Just as there is a wide range of lot absorption rates within and between individual plats, there is a lot of variation between and within Program participants. Average lot absorption rates range from 0.84 years for Belle Plaine to 8.41 years in Watertown. It is important to note that these outliers all have smaller permitting volumes and that with a smaller sample size one very fast or very slow development can significantly impact the average.

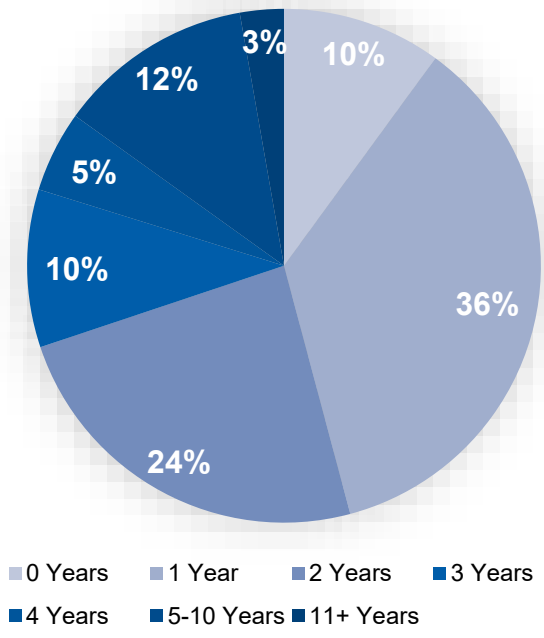
Figure 10: Years to Plat by Designation



Similarly, there is variation between the different Community Designations as shown in Figure 10. The time from platting a site to issuing a permit was the shortest in Suburban communities with an average of 2.29 years and the longest in Rural Center communities with an average of 4.06 years. The time between platting and permitting was 2.30 years in Suburban Edge and 2.84 years in Emerging Suburban Edge areas. The Program average of 2.55 years reflects that fact that 92% of permits come from Surburan Edge (51.4%) and Emerging Suburban Edge (40.88%) cities. The remaining 8% of permits come from the Suburban (6.06%), Rural Center (1.55%), and Other (0.37%) categories. The Other category covers a small number of plats that were reported in areas categorized as Diversified Rural, Rural Residential, or Agricultural.

While breaking the average years to plat down by Community Designation provides a general sense of the lot absorption rates for cities with similar characteristics, there is a great deal of variation within the categories as well. For example, the cities with the fastest and slowest lot absorption rates mentioned above are both Rural Centers. Also these averages are heavily influenced by the number of permits issued, for example the lot absorption rate of Lakeville (2.34) with over 6,000 permits issued has a lot more impact on the Suburban Edge's average lot absorption rate than the lot absorption rate of Rogers (8.2) with around 600 permits issued.

Figure 11. Years to permit

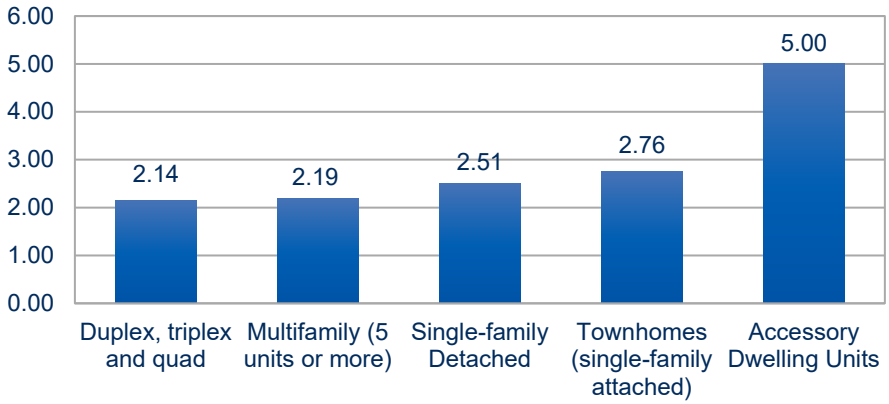


In terms of general trends, 80% of platted lots have received a building permit within three years. As shown in Figure 11, over 70% of platted lots received building permits in less than two years, 10% within the same year, 36% in one year, and 24% in the second year of the lot being platted. Only 3% of platted lots took longer than 10 years from plat approval to permit issuance. While a short time between the recording of a plat and the issuance of the permit can safely be assumed to represent strong demand and efficient permitting process, longer periods do not necessarily represent the inverse. Most plats will have some lots that are less desirable than others or which are bought up by a neighbor to provide a "double yard" before being put back on the market years later. In these cases, the city and development level market may be strong, but an

individual lot may not be developed for an extended period of time.

In terms of types of housing, as shown in Figure 12, on average cities have permitted Duplex/Triplex/Quad units in the shortest amount of time after platting (just over two years). Not surprisingly, accessory dwelling units, which are typically built after the construction of the initial dwelling unit, have taken the longest amount of time to be built after platting, averaging over five years. Single-family detached lots have an average lot absorption rate of 2.51 years and townhomes have an average lot absorption rate of 2.76 years. The lot absorption rate for multi-family is 2.19 years.

Figure 12. Years to Plat by Housing Type



County Profiles

The following section shares profiles of each county in the metropolitan area with cities that participate in the Plat Monitoring Program. The profiles highlight the number of residential plats, net residential acres, and housing units for each county in 2024 and between 2000 and 2024. They also include some high-level observations of platting activity within the county but do not provide an in-depth analysis of individual Program participants.

Anoka County

Andover, Blaine, Columbus, East Bethel, Lino Lakes, Oak Grove, Ramsey, St. Francis

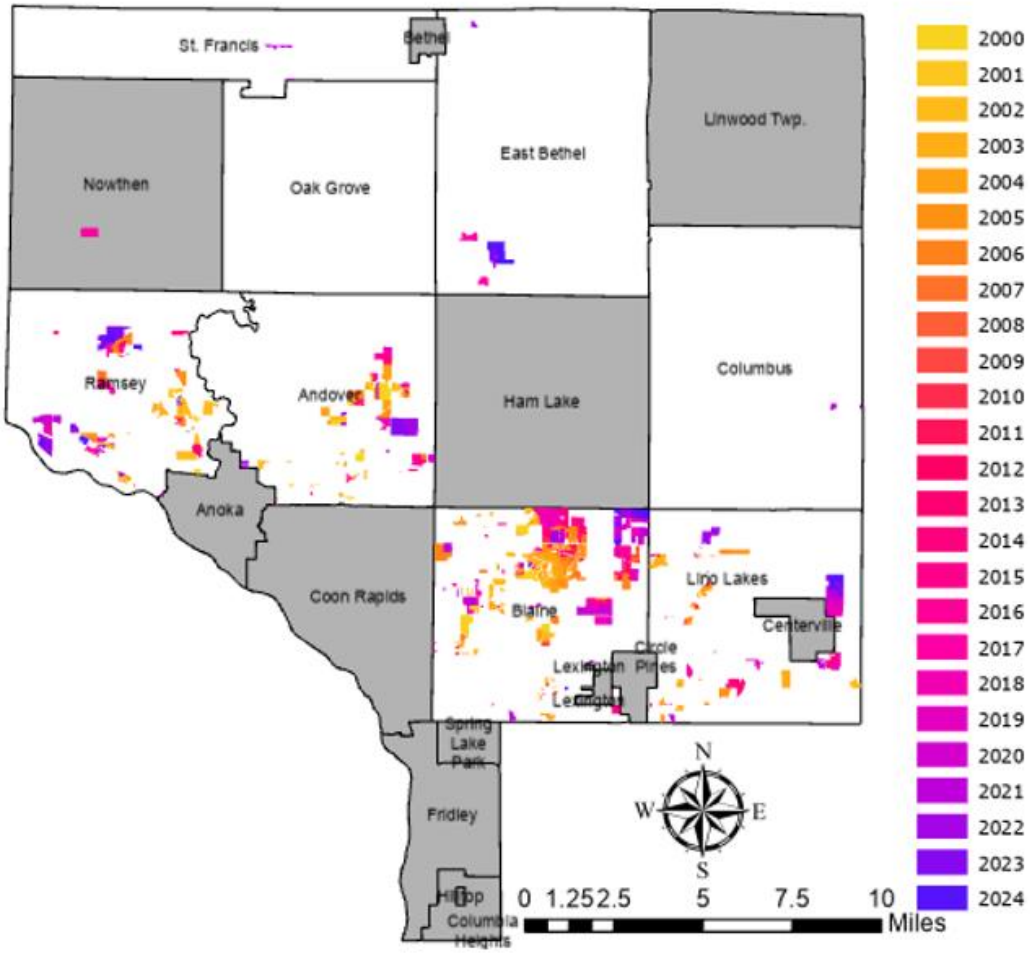
Figure 13 shows platting activity in Anoka County between 2000 and 2024 illustrating the clusters of residential development within the county. During the early 2000s, the City of Blaine approved numerous plats in the northcentral part of the city. After 2010, the bulk of the City's platting activity shifted northeast. The map also shows recent platting activity in the City of Lino Lakes near its border with Centerville, along with concentrations of platting activity on the eastern side of Andover and near the Highway 10 corridor in Ramsey.

Table 2. Anoka County Platting Activity

	2024	2000-2024	% of region wide total*
Residential Plats	17 plats	543 plats	19%
Net Residential Acres	210 net acres	6,432 net acres	17%
Total Housing Units	720 units	23,037 units	15%

*Percentage of the region wide total between 2000 and 2024.

Figure 13: Anoka County Platting Activity, 2000-2024



Carver County

Carver, Chanhassen, Chaska, Cologne, Mayer, New Germany, Norwood Young America, Victoria, Waconia, Watertown

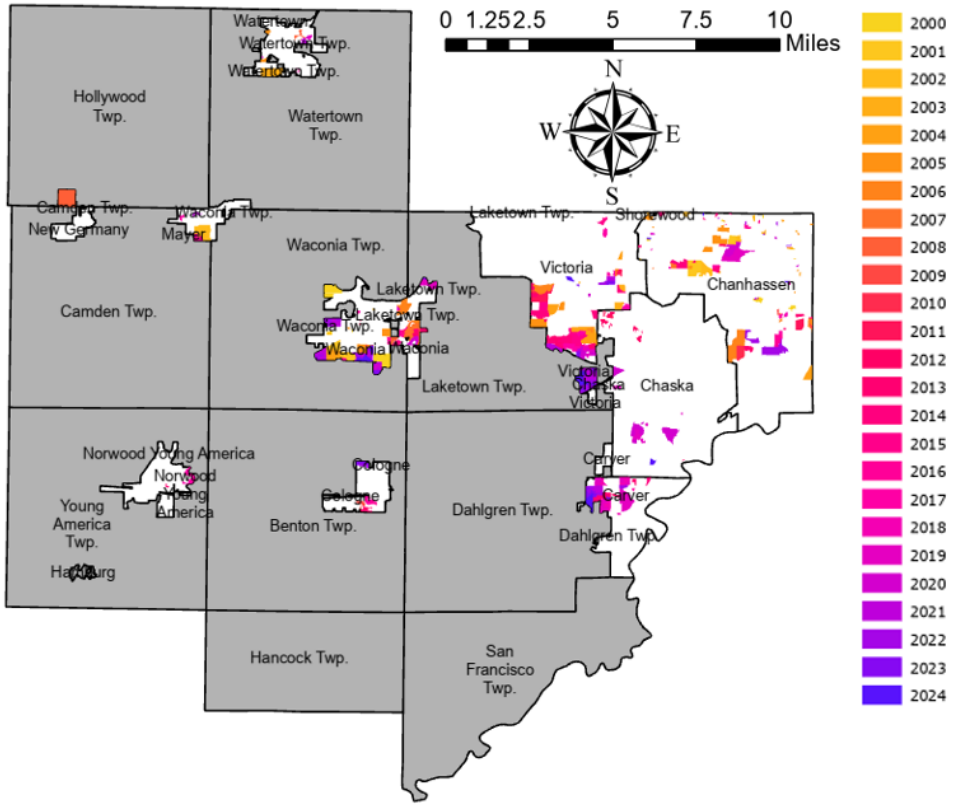
Figure 14 shows platting activity in Carver County between 2000 and 2024. The Cities of Carver, Victoria, and Waconia have mostly approved plats near the borders they share with neighboring townships. The platting activity in these areas aligns with planned annexation areas within the townships of Dahlgren, Laketown, and Waconia. Some of these cities have orderly annexation agreements (OAA) with one or multiple townships to facilitate this process, while others do not have these agreements and instead annex additional land to accommodate growth on an ad hoc basis. Chanhassen, which does not have available township land to annex, has mostly approved plats in the undeveloped southern portions of the City. Carver County also has five Rural Center communities that participate in the Plat Monitoring Program and which have approved plats since 2000, though not to the same extent as the larger cities.

Table 3. Carver County Platting Activity

	2024	2000-2024	% of region wide total*
Residential Plats	13 plats	279 plats	10%
Net Residential Acres	85 net acres	3,792 net acres	10%
Total Housing Units	803 units	13,067 units	9%

*Percentage of the region wide total between 2000 and 2024.

Figure 14: Carver County Platting Activity, 2000-2024



Dakota County

Eagan, Empire, Farmington, Inver Grove Heights, Lakeville, Rosemount

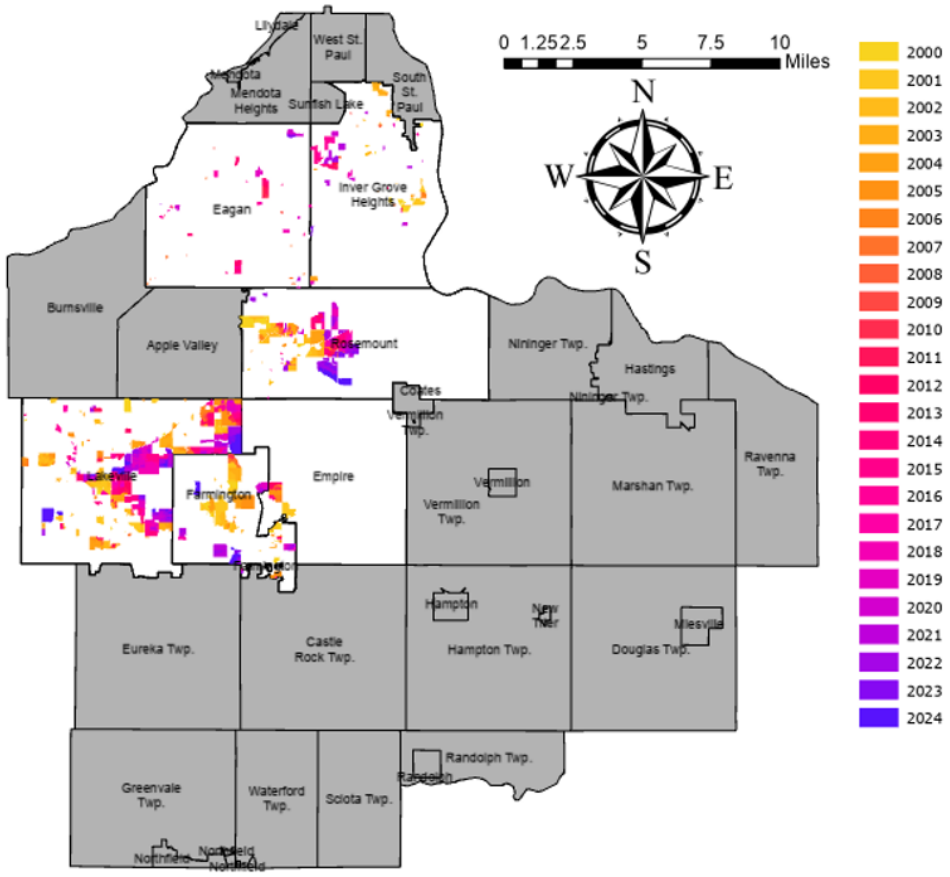
Figure 15 shows platting activity within Dakota County between 2000 and 2024. Within the City of Rosemount, platting activity in the early 2000s was concentrated in the west side of the city near its boarder with Apple Valley. More recently development has shifted east towards the center of the City. The City of Lakeville has mostly approved plats on the east side of the City south of Dodd Boulevard. In contrast to the high levels of clustered platting activity in Rosemount and Lakeville, activity in the cities of Eagan and Inver Grove Heights has been more sporadic indicating that these communities are almost fully built out and may only have a small number of undeveloped parcels remaining. Most of Farmington's platting activity was initially in the center of the city but more activity has been observed near the periphery in recent years.

Table 4. Dakota County Platting Activity

	2024	2000-2024	% of region wide total*
Residential Plats	22 plats	628 plats	22%
Net Residential Acres	361 net acres	8,237 net acres	22%
Total Housing Units	1,594 units	35,880 units	24%

*Percentage of the region wide total between 2000 and 2024.

Figure 15: Dakota County Platting Activity, 2000-2024



Hennepin County

Brooklyn Park, Corcoran, Dayton, Eden Prairie, Independence, Maple Grove, Medina, Minnetrista, Orono, Plymouth, Rogers

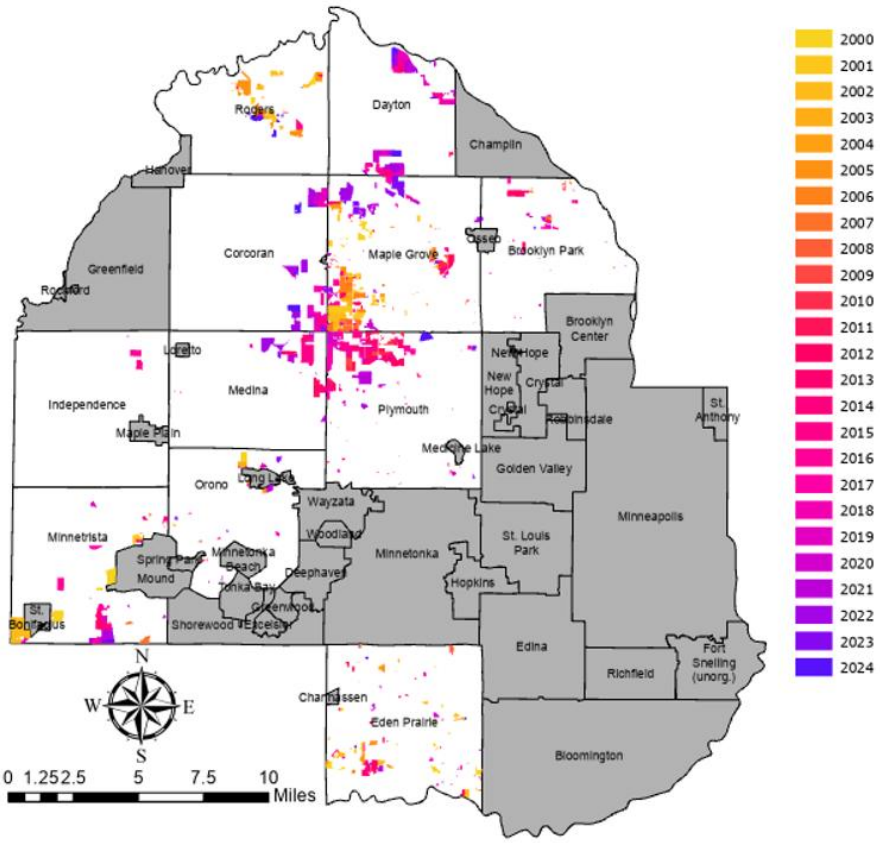
Table 5. Hennepin County Platting Activity

	2024	2000-2024	% of region wide total*
Residential Plats	21 plats	734 plats	26%
Net Residential Acres	314 net acres	9,377 net acres	25%
Total Housing Units	1,975 units	38,276 units	25%

*Percentage of the region wide total between 2000 and 2024.

Figure 16 shows platting activity in Hennepin County between 2000 and 2024. Within the county, a significant portion of the platting activity has occurred around the point where the Cities of Corcoran, Maple Grove, Medina, and Plymouth meet. Residential development started concentrating in the southwest corner of Maple Grove in the early 2000s and later moved to northwest Plymouth and northeast Medina in the early- to mid-2010s. Platting activity continued to occur in those areas, while also beginning to increase in southeast Corcoran. Outside of this nexus of platting activity, the Cities of Rogers and Dayton have reported plats mostly along the I-94 corridor. Minnetrista has also begun reporting more plats along its southern border in recent years.

Figure 16: Hennepin County Platting Activity, 2000-2024



Scott County

Belle Plaine, Elko New Market, Jordan, Prior Lake, Savage, Shakopee

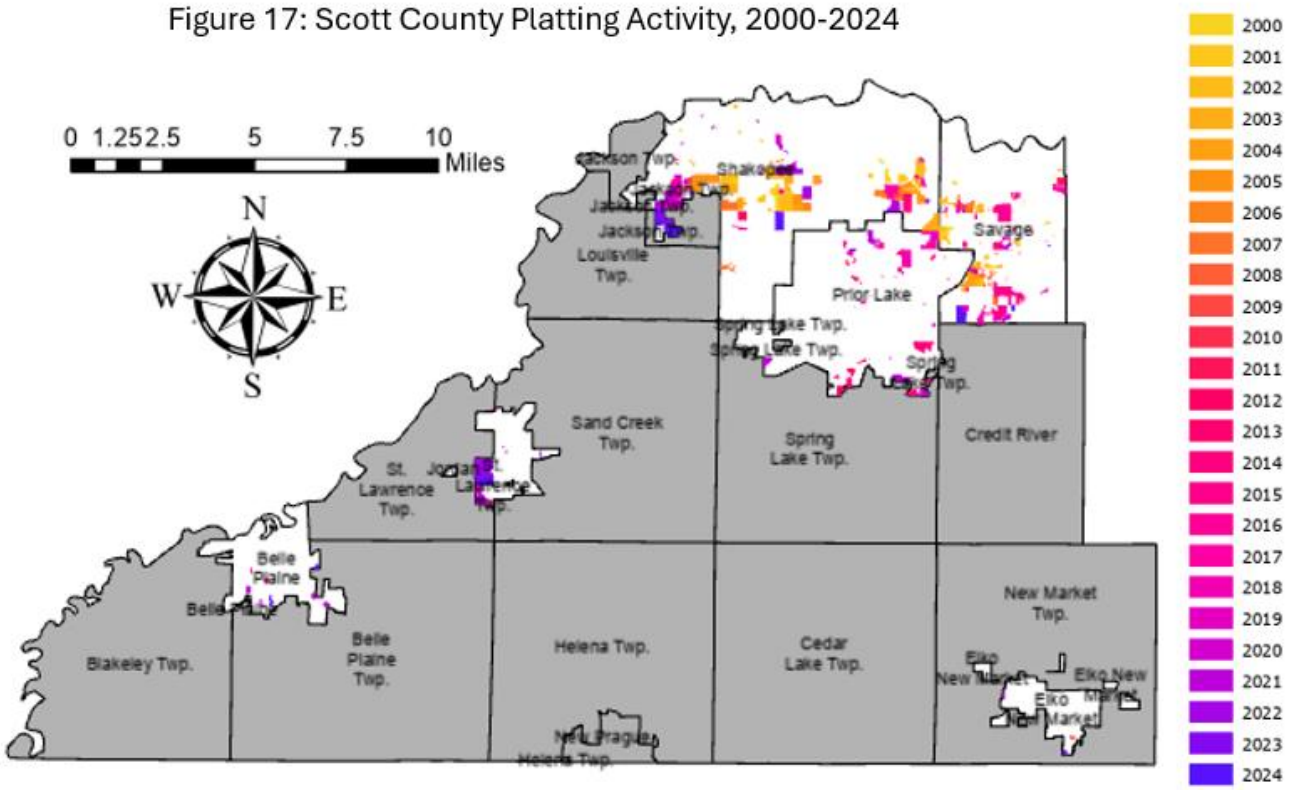
Figure 17 shows platting activity in Scott County between 2000 and 2024. In Shakopee, most residential plats approved during this time are located south of Highway 169 and along 17th Avenue East/Eagle Creek Boulevard. The area between the clusters of plats in the central and eastern parts of the City is mostly held in trust by the Shakopee Mdewakanton Sioux Community. There is also a cluster of more recently approved plats along its western border near the area in which the City has an Orderly Annexation Agreement (OAA) with Jackson Township. Within the City of Savage, residential development was concentrated on the west side of the City with more recent development occurring in the southern portion of the city. While the City of Jordan has not seen platting activity to the same extent as other communities in Scott County, the recent activity along its western border is significant when considering its size and status as a Rural Center community. In recent years Belle Plaine and Elko New Market have both reported some development activity near their borders with neighboring townships.

Table 6. Scott County Platting Activity

	2024	2000-2024	% of region wide total*
Residential Plats	12 plats	320 plats	11%
Net Residential Acres	108 net acres	3,649 net acres	10%
Total Housing Units	633 units	16,151 units	11%

*Percentage of the region wide total between 2000 and 2024.

Figure 17: Scott County Platting Activity, 2000-2024



Washington County

Cottage Grove, Hugo, Lake Elmo, Woodbury

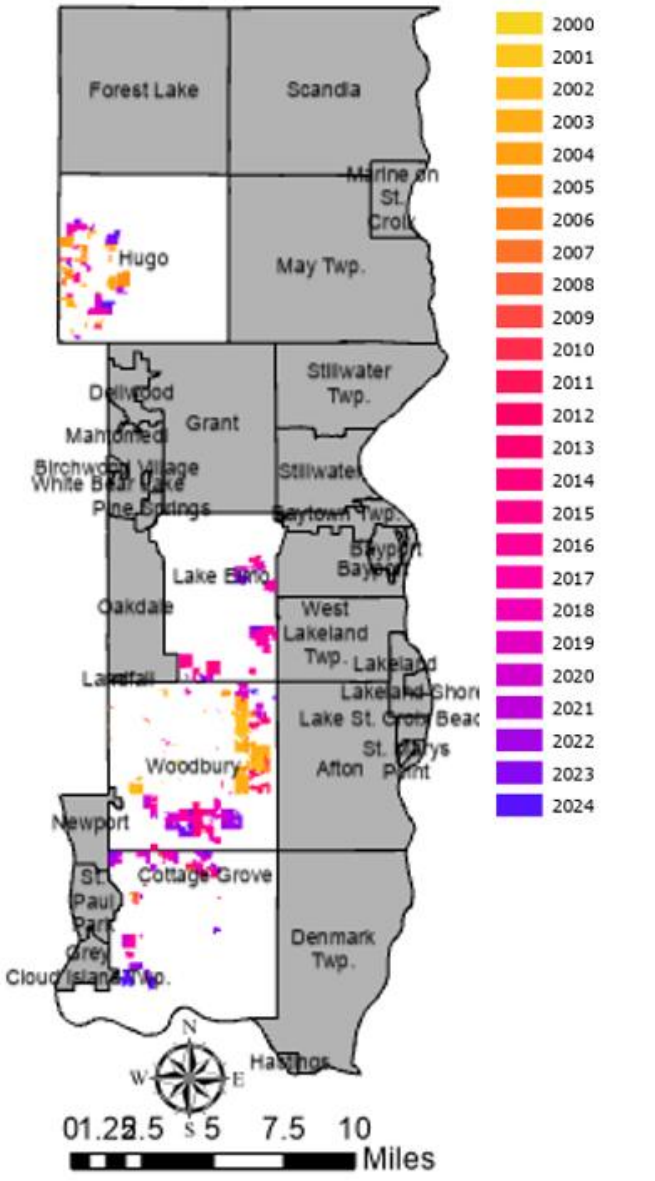
Table 7. Washington County Platting Activity

	2024	2000-2024	% of region wide total*
Residential Plats	18 plats	363 plats	13%
Net Residential Acres	231 net acres	6,392 net acres	17%
Total Housing Units	1,535 units	25,651 units	17%

*Percentage of the region wide total between 2000 and 2024.

Figure 18 shows platting activity in Washington County between 2000 and 2024. In the City of Woodbury, there are two main concentrations of residential plats: south of Bailey Road and west of Manning Avenue. Development on the eastern side of the City mostly occurred in the early- to mid-2000s, whereas development to the south is more recent. The City's southern neighbor, Cottage Grove, has also seen recent platting activity near this area along their shared border. The City of Hugo's sewered residential platting activity since 2000 has occurred in the western part of the City along the Highway 61 corridor. This area of the City is connected to the regional wastewater system; therefore, it is unsurprising that new development would concentrate in the area with access to infrastructure. It is also important to note that this Program only captures sewered plats which explains why the map does not show activity on the eastern side of the City since those developments are served by septic systems and are planned to be more rural in character. This also applies to the pattern of platting activity in the City of Lake Elmo along its southern and eastern borders, as well as other communities in the region with only part of the jurisdiction located within the MUSA.

Figure 18: Washington County Platting Activity, 2000-2024



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