

EXECUTIVE SUMMARY



Population and Survey Analysts (PASA) has recently completed a Demographic Update for the City of Fulshear, and the findings are summarized below. The Demographic Update included the study of the current population, potential growth based on new housing, and trends occurring in the population throughout the northwest Fort Bend County region. PASA projects population by using forward-looking techniques and does not rely on past rates of change.

2022 POPULATION ESTIMATE

After evaluating the current population of the City and the City's Extra-territorial Jurisdiction (ETJ), recent trends in population, projected additional housing occupancies and their resulting household size, and the over-arching economic and employment concerns, PASA has estimated the 2022 population inside the City Limits to be 23,397. This represents a population increase of 6,525 (38.7%) from the decennial census in 2020.

City	23,397
ETJ	35,435
City + ETJ	58,832

ANNUAL POPULATION PROJECTIONS

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
City											
Population	23,397	26,181	29,262	32,375	34,883	36,709	38,629	39,911	41,275	42,852	44,418
Change		2,784	3,081	3,113	2,508	1,826	1,920	1,282	1,364	1,577	1,566
Growth		12%	12%	11%	8%	5%	5%	3%	3%	4%	4%
ETJ											
Population	35,435	40,236	46,189	52,679	59,547	67,475	76,024	84,919	93,691	102,077	109,315
Change		4,801	5,953	6,490	6,868	7,928	8,549	8,895	8,772	8,386	7,238
Growth		14%	15%	14%	13%	13%	13%	12%	10%	9%	7%
City + ETJ		66,417	75,451	85,054	94,430	104,184	114,653	124,830	134,966	144,929	153,733

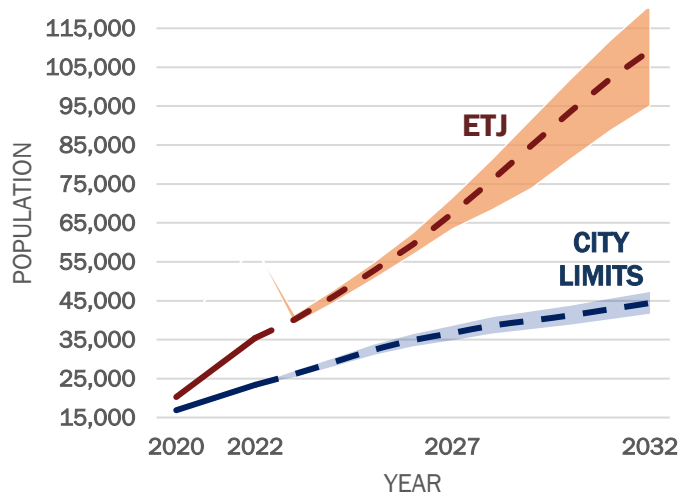
Without annexation, growth in the City Limits is expected to decrease from approximately 3,000 annually to just over 1,500 annually by 2032. The annual population change within the ETJ is projected to grow larger throughout the ten-year projection period. By 2028, the population of the ETJ is projected to double from the 35,435 estimated today, expanding to over 76,000. Actual annual population growth in the combined Fulshear City Limits and ETJ is projected to hover near 10,000 throughout the projection period.

CENSUS BUREAU POPULATION ESTIMATES

PASA’s estimated 2022 population and the U.S. Census Bureau estimate for the same year vary greatly. The 2022 population estimate produced by the Census Bureau is 34,264, a remarkable increase from the 16,872 in 2020. PASA has decided that inflated permit data is the likely cause of the erroneous U.S. Census Bureau estimate. Although PASA is not aware of the exact methodology used by the Bureau to gather the data or create the estimate, it is highly likely that the number is not accurate and should not be relied upon for planning purposes. Over 2,500 homes would have to be occupied annually within the city limits in order for this number to be true. Over the last two years, approximately 900 to 1,000 new homes have been built and occupied annually.

GROWTH SCENARIOS

PASA takes a “conservative” approach to projecting growth and develops a Low, Moderate, and High scenario of growth for each of the years in the projection period. These scenarios are shown on a graph to the right. The moderate growth scenarios are illustrated with hashed trend lines. In blue, the population in the City Limits is projected to grow to 44,418 by 2032. The population of the ETJ is projected to increase to 109,315 in the same period. The shaded portions of the chart indicate the low- and high-growth scenarios for each jurisdiction.



PROJECTED NEW HOUSING UNITS

Area	2022 Estimate	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
City	6,994	8,045	9,261	10,475	11,448	12,169	12,882	13,308	13,757	14,267	14,730
ETJ	10,437	11,782	13,673	15,687	17,712	19,931	22,349	24,895	27,392	29,763	31,798
City + ETJ	17,431	19,827	22,934	26,162	29,160	32,100	35,231	38,203	41,149	44,030	46,528

PASA has projected new housing occupancies for the next ten years. These projections are based on interviews with land owners, housing developers and builders, real estate experts, commercial brokers, and City and County officials. PASA develops projections of new home occupancies in the third quarter of each year.

PROPORTION OF HOUSING UNITS BY HOUSING TYPE

Housing Type	2022		2027 Projected		2032 Projected	
Single-Family	16,246	93.2%	27,039	84.2%	39,082	84.0%
Age-Restricted Housing	503	2.9%	754	2.3%	1,174	2.5%
Multi-Family	682	3.9%	4,307	13.4%	6,272	13.5%
Total Housing Units	17,431		32,100		46,528	

*Housing Units in the City Limits and ETJ

PROJECTIONS BY COMMUNITY

PASA has generated population projections by Planning Unit, neighborhood-level geographies, to aid in long range planning and has then aggregated the data into the boundaries of both master-planned communities and City regions. Population projections by Planning Unit are shown later in the report. Projections of specific neighborhoods are outlined in the Projected Housing Occupancies table.

HOUSEHOLD SIZE AND HOUSING TYPES

The average household size of neighborhoods in the Study Area can vary dramatically. Neighborhood attributes such as lot sizes, amenities, and lifestyle options impact the number of people residing in individual homes. Conventional suburban residential communities generally have a larger median household size, particularly as the neighborhood ages and a “peak” population develops. Traditional suburban single-family neighborhoods in northern Fort Bend County have a median household size of 3.15 to 3.80. In comparison, estate communities such as Fulbrook and nearby Weston Lakes have a median household size of approximately 2.60 to 2.85 according to the U.S. Census. Exurban communities on the fringes of the Metro Area are often marketed to older, smaller households. These exurban neighborhoods feature larger lots that appeal to retirees.

PASA has estimated household size for each current and future neighborhood by using various data sources to create useful population estimates and projections by Planning Unit. In order to determine household size estimates, census-estimated household sizes by Census Block Group and Census Tract were analyzed as well as Lamar CISD and Katy ISD enrollment counts by neighborhood. Housing styles, apartment bedroom

Housing Type	Typical Household Size
Multi-Family, majority 1-bedroom	1.55-1.85
Multi-Family, majority 2+ bedroom	1.85-2.25
Single-Family, Family Oriented	3.15-3.30 initially; 3.30-3.80 at peak
Single-Family, Age-Restricted 55+	1.65-1.80
Single-Family, Acreage/Rural Estate	2.65-2.85

counts, and covenants that restrict youth from living in homes were also considered along with other demographic characteristics of developing neighborhoods.

Multi-family developments in the western suburbs tend to have a median household size of 1.55 to 2.25 depending on the proportion of one-bedroom apartments to total number of units within each individual property.

PROPORTION OF POPULATION BY HOUSING TYPE

Housing Type	2022		2027 Projected		2032 Projected	
Single-Family	56,623	96.25%	94,166	90.4%	139,148	90.5%
Age-Restricted SF	880	1.50%	1,620	1.6%	2,355	1.5%
Multi-Family	1,329	2.26%	8,398	8.1%	12,230	8.0%
Population	58,832		104,184		153,733	

*Housing Units in the City and ETJ

HOUSING OCCUPANCY STATUS

PASA considers vacant housing when creating population projections for such a large study area. The U.S. Census estimates that 6.7% of the existing housing stock in the City of Fulshear is vacant per the 2020 Census. Also, PASA does not consider new homes available for purchase to be occupied. New housing communities are surveyed by PASA staff and only occupied homes are counted. Unoccupied, new homes are included in the housing projections for each individual community. The current (2022 Estimate) housing counts available in this report, however, include totals for all homes completed. These housing counts and projected housing counts include all occupied and vacant homes for completeness so planners can determine the projected number of utility connections annually.

ECONOMIC GROWTH

Low inventory and high demand tightened markets and drastically increased home prices from mid-2020 through 2021, as historically low mortgage rates fueled a robust housing market. This market is now cooling.

Inflation, interest rate hikes, and fears of a looming recession were the highlight of economic news in 2022, and uncertainty about the US economy still leads headlines in 2023. The Federal Reserve (Fed) is committed to reducing inflation to its 2% long-term target and, to this end, has continued to increase the federal funds target rate. Since March 2022, the Fed has raised this rate ten times to a May 2023 level of 5.00 - 5.25%. These increases mark the first time the Fed had increased this rate since late 2018, and the June 2022 increase was the largest single increase since 1994. With the May rate increase, the Fed hinted that future rate increases may not be needed.

According to data from Freddie Mac, increased federal fund target rates drove the average 30-year fixed rate mortgage to 7.08% in late October 2022, the first time it had surpassed 7%

since April 2002 and more than double the 3.14% it was a year previous. As of May 18, 2023, the weekly average rate was 6.39%.

MANUFACTURING AND LOGISTICS

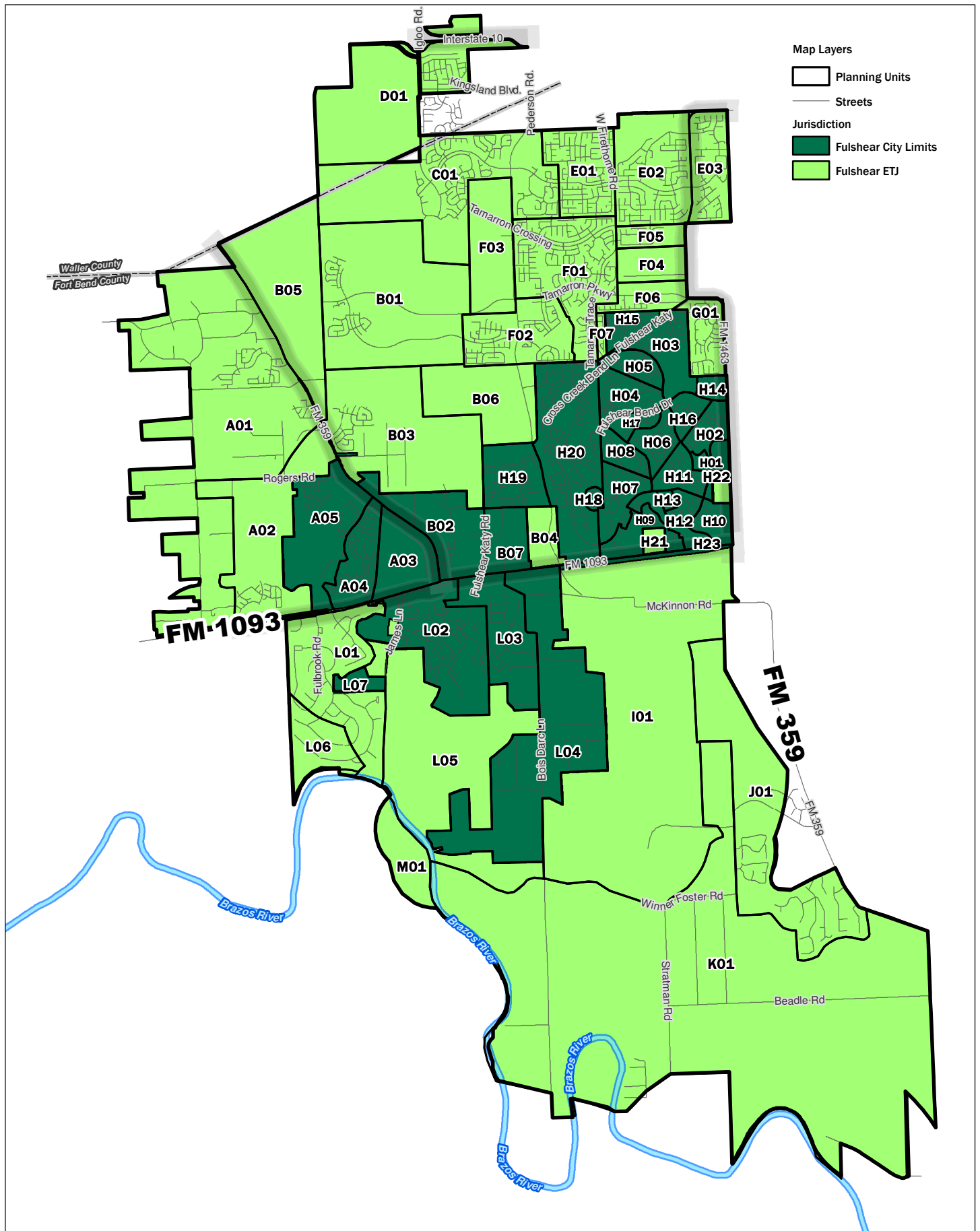
As online commerce expands along with the population of Texas and other south-central states, distribution and warehousing will have a larger role in Houston's economy. Fulshear is located near one of the three fulfillment/distribution hubs in Metro Houston, the far west-northwest suburbs. The Interstate 10 Corridor between Katy and Brookshire has seen tremendous growth in industrial development, and more companies continue to expand in the area. The proximity to Interstate 10 and U.S. 290 is proving to be a draw for many retailers and distributors who want central access to Houston and quick access to other parts of the growing region and state including San Antonio and Austin.

Recent industrial expansions in the region include:

- Empire West Business Park, located at the northwest corner of Interstate 10 and Woods Road, is under construction. Phase 1 was completed in 2021 and includes 1.05 million sq. ft. of space now leased by multiple manufacturing companies, including Newport News, Ferguson Enterprises, PVF, Warefor Solutions, and Winix America. Construction on Phase 2 of the development, which includes six buildings totaling 2.3 million sq. ft., was completed in late 2022. Phase 3 broke ground in late 2022 and will complete the development with two additional buildings totaling 800,000 sq. ft. Tesla has leased over 1 million sq. ft. in Building 9 of Phase 2 and is likely going to use the facility for battery storage. Also, in 2022, H-E-B Grocery leased 300,000 sq. ft. in the park for distribution and warehouse space.
- Twinwood broke ground on the 650-acre Uplands at Twinwood Business Park in mid-2018. Located just inside Waller County, along and south of the future Twinwood Ranch Road, several companies, including MAN Diesel & Turbo, are expanding here. The 546,000-sq. ft. Twinwood Distribution Center II is now leasing at 2439 Discovery Hills Pkwy. Another new 224,000-sq. ft. building is also leasing.
- Westside 10 Industrial Park was recently completed along FM 1489 south of I-10 in Brookshire. The facility consists of 167,000 sq. ft. and is now leasing.
- Costco Wholesale Corp. recently completed a large warehouse/distribution center at I-10 and Igloo Road to serve all of south-central Texas.
- Ross Dress for Less completed a 2 million sq. ft. distribution and sorting center in 2021 along Kingsland Blvd. at Woods Road just south of I-10.
- Katy Prairie Business Park, a new 87-acre development located along Igloo Road north of Interstate 10, is complete. A 59,000-sq. ft. Domino's Pizza manufacturing and distribution center is the first tenant to serve all of south Texas. Another 1 million sq. ft. of space in two spec buildings is now available.

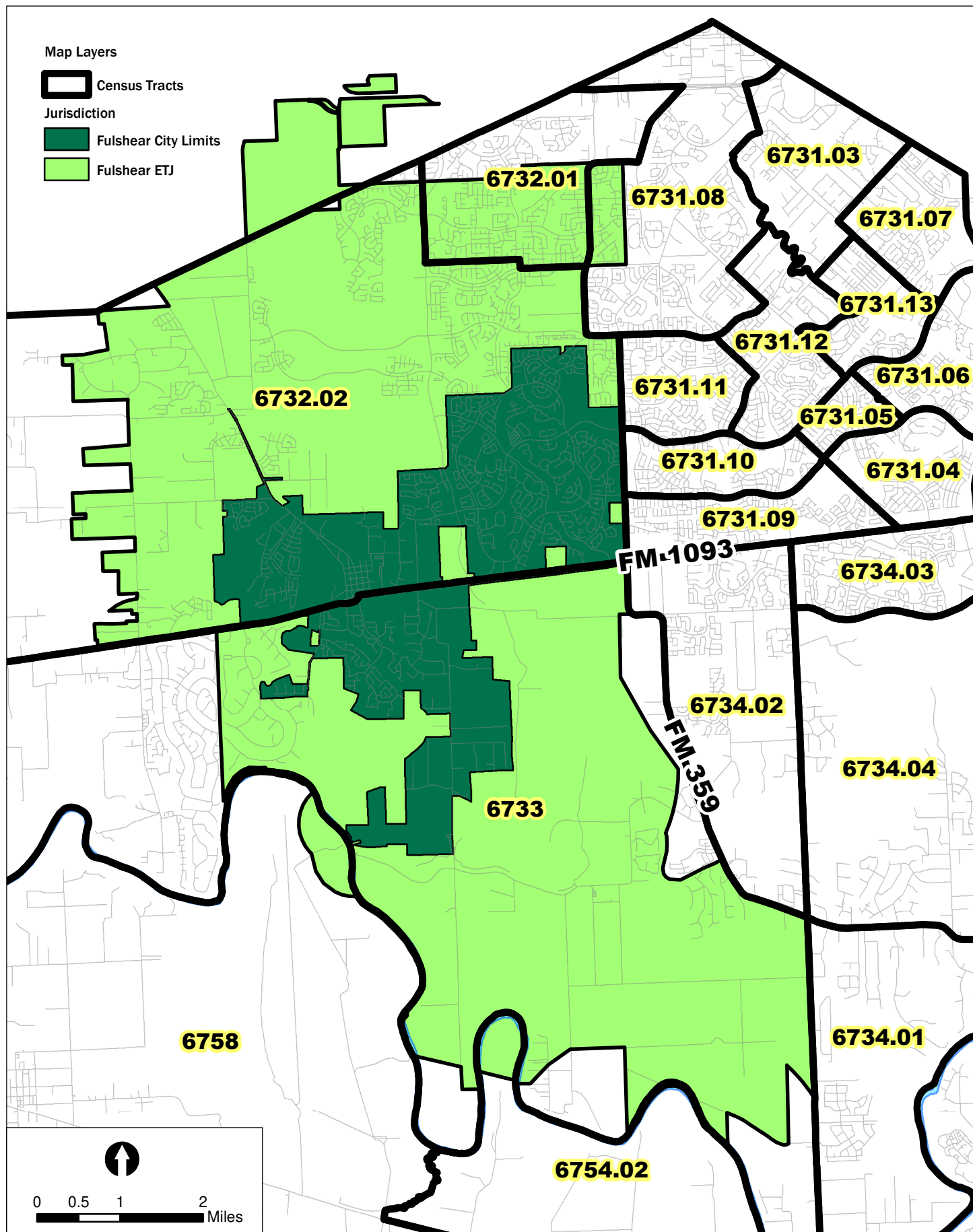
Planning Units

City of Fulshear: City Limits and ETJ



2020 Census Tract Boundaries

North Fort Bend County



Demographic Characteristics by Census Tract
2021 Five-Year American Community Survey

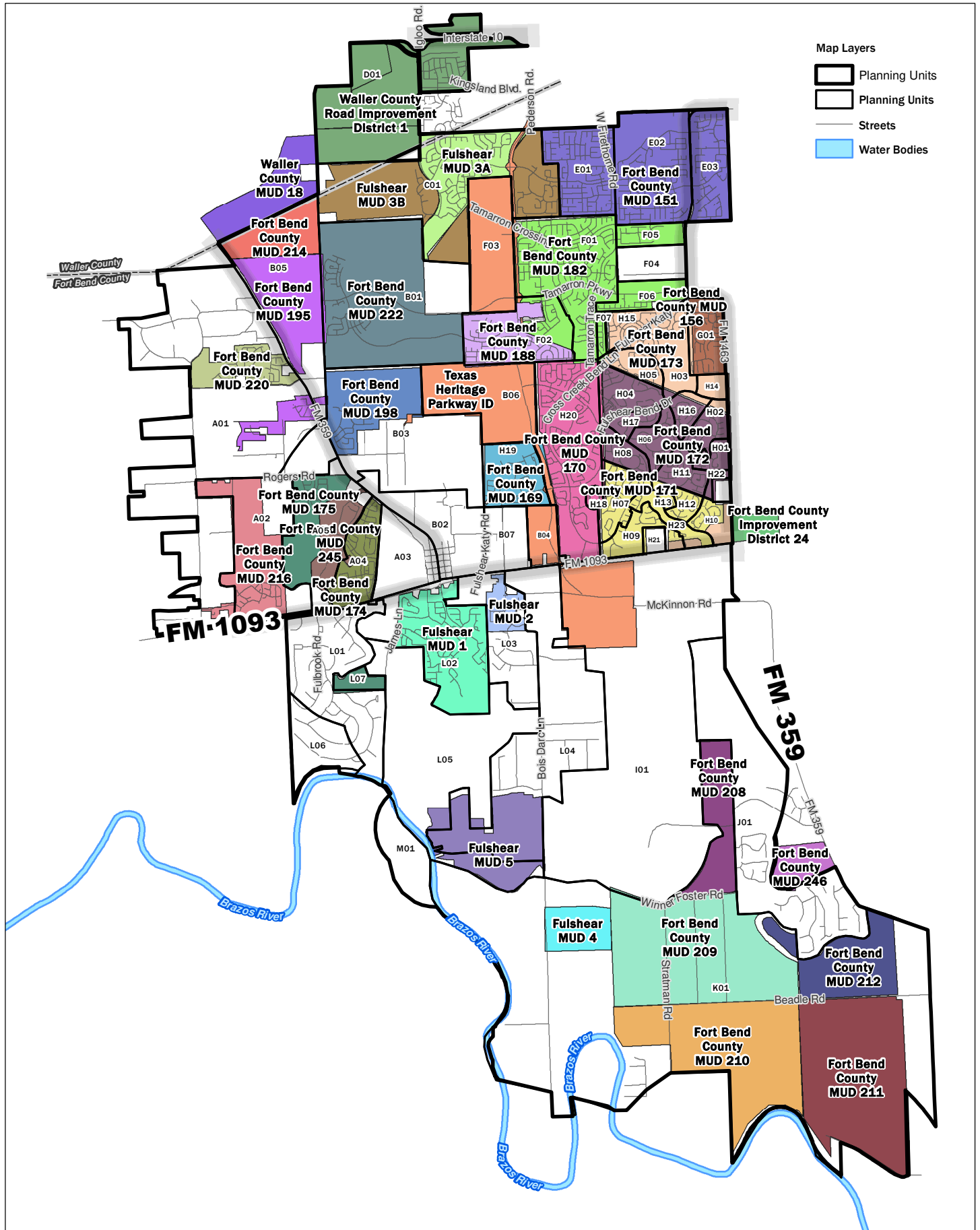


	Tract 6731.03	Tract 6731.04	Tract 6731.05	Tract 6731.06	Tract 6731.07	Tract 6731.08	Tract 6731.09	Tract 6731.10	Tract 6731.11	Tract 6731.12	Tract 6731.13	Tract 6732.01	Tract 6732.02	Tract 6733	Tract 6734.01	Tract 6734.02	Tract 6734.03	Tract 6734.04
Total households	1,182	2,694	1,208	2,234	1,897	5,026	3,085	2,170	3,013	2,652	2,225	3,126	6,961	2,862	2,515	2,692	2,944	3,416
Average household size	2.6	2.98	3.28	2.44	3.03	3.47	3.48	4.07	3.55	3.26	3.31	3.43	3.43	2.92	3.09	3.01	2.87	3.09

Total Population	3,072	8,016	3,960	5,443	5,741	17,575	10,750	8,828	10,697	8,645	7,361	10,709	23,853	8,358	7,765	8,104	8,451	10,561
Under 5	0.0%	4.8%	7.8%	3.0%	3.2%	8.4%	4.7%	3.4%	7.3%	8.1%	13.8%	13.0%	6.6%	3.7%	3.1%	9.3%	11.1%	10.1%
Ages 5-17	21.6%	19.9%	28.9%	20.9%	24.4%	29.1%	31.2%	39.3%	31.8%	25.9%	24.6%	24.9%	26.0%	18.7%	23.5%	22.6%	20.4%	21.4%
Ages 18-24	7.4%	10.1%	4.5%	2.2%	9.9%	3.3%	5.2%	4.0%	2.8%	5.5%	6.0%	3.7%	6.9%	5.7%	4.4%	4.6%	4.9%	8.1%
Ages 25-34	2.7%	6.5%	7.2%	4.8%	7.8%	6.4%	4.8%	2.8%	9.8%	10.2%	9.6%	9.1%	7.9%	6.4%	10.9%	11.1%	10.5%	13.0%
Ages 35-49	29.3%	26.1%	28.8%	28.1%	25.6%	30.6%	37.9%	29.1%	32.1%	23.9%	28.0%	31.3%	30.1%	17.9%	26.2%	25.0%	28.0%	27.8%
Ages 50-59	19.6%	14.8%	16.9%	14.3%	15.1%	12.3%	4.8%	16.9%	6.8%	13.9%	11.1%	9.7%	10.8%	11.3%	11.2%	9.8%	16.6%	9.9%
60 Year and Over	19.5%	17.8%	5.9%	26.6%	14.1%	10.0%	11.5%	4.5%	9.5%	12.5%	7.0%	8.3%	11.7%	36.3%	20.8%	17.6%	8.5%	9.8%
Population 25 and Over																		
Bachelor's degree or higher	54.8%	50.8%	75.9%	69.7%	59.8%	73.2%	73.1%	81.7%	74.7%	81.3%	79.4%	62.4%	64.8%	55.4%	41.2%	48.6%	73.6%	41.9%
Labor Force Over 16																		
Percent Unemployed	N/A	3.3%	N/A	N/A	N/A	4.3%	3.4%	1.8%	2.7%	6.1%	7.9%	4.2%	3.7%	2.8%	3.3%	0.3%	4.3%	0.6%
Median Household Income	N/A	\$119,146	N/A	N/A	N/A	\$163,626	\$127,205	\$235,530	\$152,409	\$133,750	\$111,733	\$151,696	\$146,219	\$174,125	\$130,256	\$111,722	\$137,956	\$151,736
Housing Characteristics																		
Median Home Value, Owner-Occupied	N/A	\$387,100	N/A	N/A	N/A	\$468,200	\$312,700	\$439,900	\$368,500	\$361,900	\$313,400	\$358,700	\$389,600	\$524,800	\$348,700	\$292,700	\$352,900	\$412,000
Owner-occupied housing units	N/A	55.0%	N/A	N/A	N/A	90.5%	78.6%	94.7%	94.2%	80.5%	60.7%	89.6%	93.4%	97.9%	88.5%	96.1%	85.2%	78.9%
Renter-occupied housing units	N/A	45.0%	N/A	N/A	N/A	9.5%	21.4%	5.3%	5.8%	19.5%	39.3%	10.4%	6.6%	2.1%	11.5%	3.9%	14.8%	21.1%

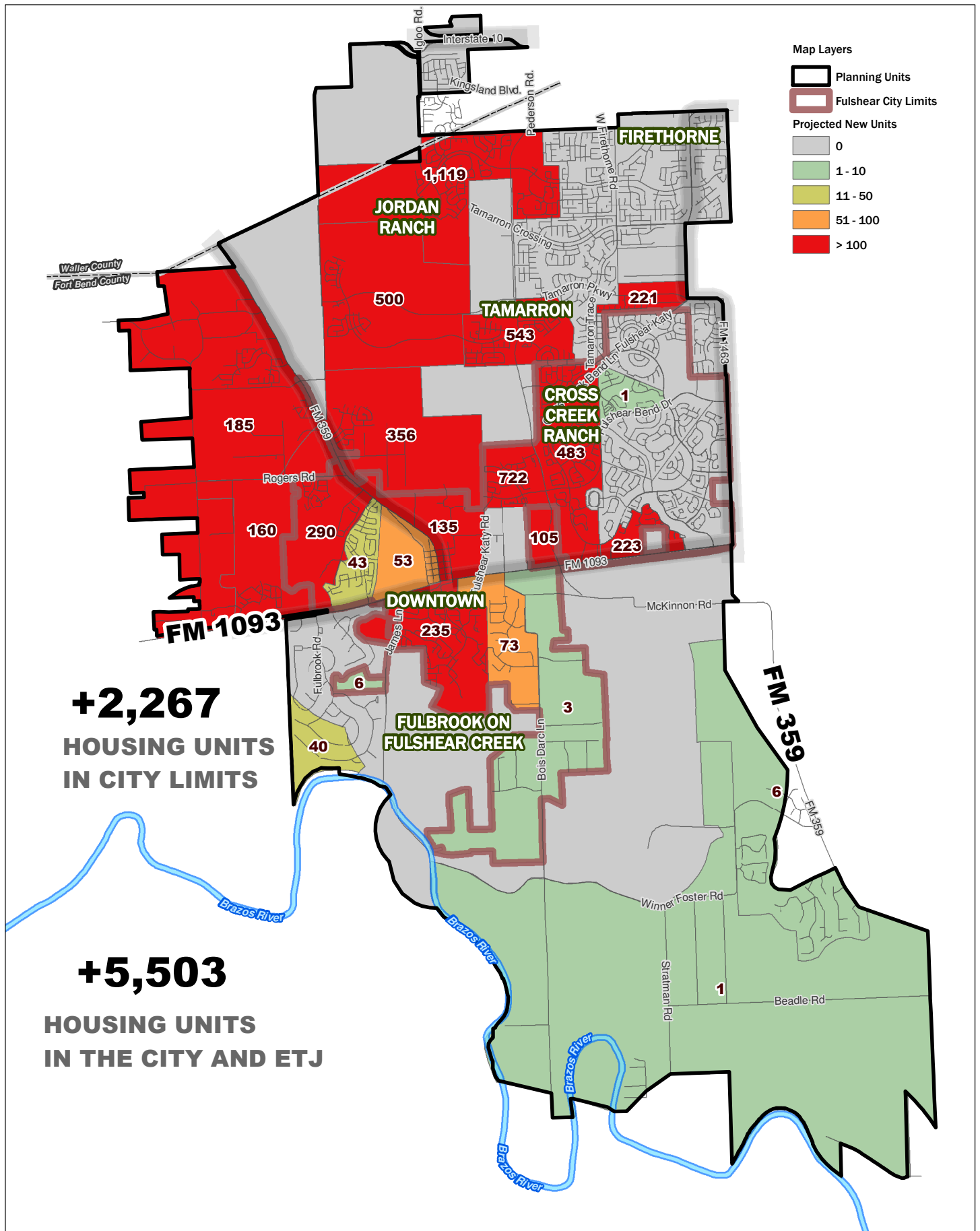
Utility Districts

City of Fulshear: City Limits and ETJ



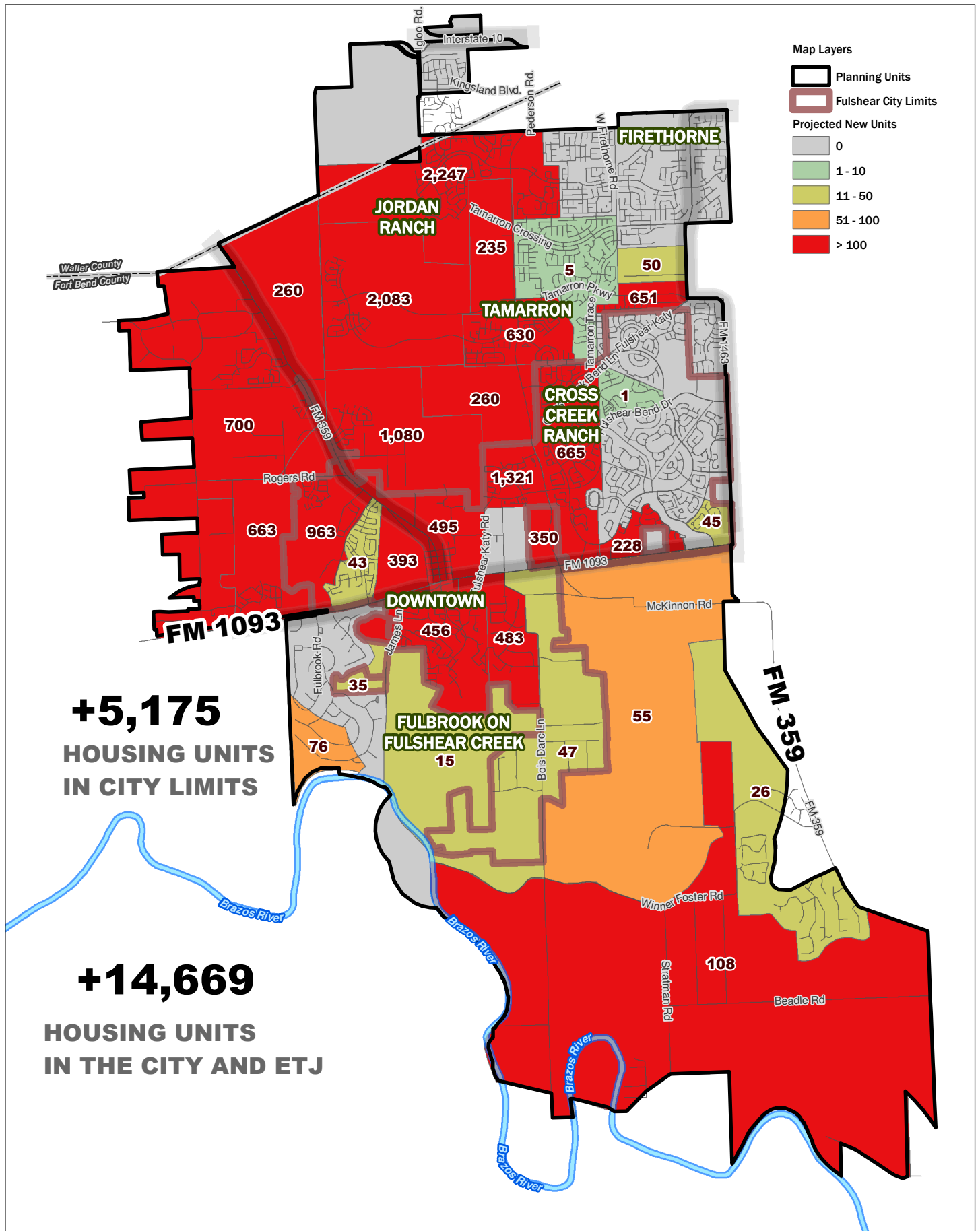
Projected New Housing Units

City of Fulshear - 2022 to 2024



Projected New Housing Units

City of Fulshear - 2022 to 2027



PROJECTED HOUSING UNITS BY PLANNING UNIT
FULSHEAR, TEXAS



Planning Unit	Area	2022*	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
A01	ETJ	717	800	902	1,073	1,276	1,417	1,530	1,676	1,823	1,972	2,094
A02	ETJ	3	46	163	312	481	666	926	1,178	1,391	1,503	1,578
A03	CL	12	12	65	175	285	405	523	541	561	585	611
A04	CL	740	781	783	783	783	783	783	783	783	783	783
A05	CL	0	121	290	497	717	963	1,194	1,302	1,407	1,512	1,517
B01	ETJ	48	258	548	950	1,518	2,131	2,792	3,448	4,064	4,479	4,726
B02	CL	15	61	150	260	380	510	685	940	1,230	1,575	1,965
B03	ETJ	57	198	413	626	873	1,137	1,372	1,522	1,606	1,701	1,816
B04	ETJ	0	0	105	235	350	350	350	350	350	350	350
B05	ETJ	0	0	0	0	30	260	565	1,025	1,550	2,090	2,420
B06	ETJ	0	0	0	10	100	260	460	710	980	1,255	1,555
B07	CL	7	7	7	7	7	7	7	7	7	7	7
C01	ETJ	1,196	1,645	2,315	2,831	3,121	3,443	3,649	3,719	3,719	3,719	3,719
D01	ETJ	457	457	457	457	457	457	457	457	457	457	457
E01	ETJ	1,377	1,377	1,377	1,377	1,377	1,377	1,377	1,377	1,377	1,377	1,377
E02	ETJ	1,318	1,318	1,318	1,318	1,318	1,318	1,318	1,318	1,318	1,318	1,318
E03	ETJ	630	630	630	630	630	630	630	630	630	630	630
F01	ETJ	2,307	2,307	2,307	2,308	2,310	2,312	2,315	2,315	2,315	2,315	2,315
F02	ETJ	498	825	1,041	1,126	1,128	1,128	1,128	1,128	1,128	1,128	1,128
F03	ETJ	0	0	0	20	110	235	400	585	780	1,035	1,320
F04	ETJ	21	21	21	21	21	71	121	171	221	271	271
F05	ETJ	545	545	545	545	545	545	545	545	545	545	545
F06	ETJ	122	192	343	634	773	773	773	773	773	773	773
F07	ETJ	113	113	113	113	113	113	113	113	113	113	113
G01	ETJ	562	562	562	562	562	562	562	562	562	562	562
H01	CL	119	119	119	119	119	119	119	119	119	119	119
H02	CL	298	298	298	298	298	298	298	298	298	298	298
H03	CL	398	398	398	398	398	398	398	398	398	398	398
H04	CL	353	354	354	354	354	354	354	354	354	354	354
H05	CL	221	221	221	221	221	221	221	221	221	221	221
H06	CL	227	227	227	227	227	227	227	227	227	227	227
H07	CL	227	227	227	227	227	227	227	227	227	227	227
H08	CL	120	120	120	120	120	120	120	120	120	120	120
H09	CL	232	336	455	460	460	460	460	460	460	460	460
H10	CL	159	159	159	174	189	204	219	234	234	234	234
H11	CL	253	253	253	253	253	253	253	253	253	253	253
H12	CL	131	131	131	131	131	131	131	131	131	131	131
H13	CL	50	50	50	50	50	50	50	50	50	50	50
H14	CL	359	359	359	359	359	359	359	359	359	359	359
H15	CL	183	183	183	183	183	183	183	183	183	183	183
H16	CL	186	186	186	186	186	186	186	186	186	186	186
H17	CL	106	106	106	106	106	106	106	106	106	106	106
H18	CL	67	67	67	67	67	67	67	67	67	67	67
H19	CL	60	336	782	1,194	1,377	1,381	1,381	1,381	1,381	1,381	1,381
H20	CL	1,340	1,667	1,823	1,903	1,983	2,005	2,005	2,005	2,005	2,005	2,005
H21	ETJ	0	0	0	0	0	0	0	0	0	0	0
H22	CL	0	0	0	0	0	0	0	0	0	0	0
H23	CL	63	63	63	63	63	63	63	63	63	63	63
I01	ETJ	5	5	5	5	20	60	160	305	475	695	955
J01	ETJ	60	64	66	69	75	86	103	126	153	180	211
K01	ETJ	24	25	25	26	66	132	222	367	552	767	1,017
L01	ETJ	317	317	317	317	317	317	317	317	317	317	317
L02	CL	802	906	1,037	1,173	1,251	1,258	1,258	1,258	1,258	1,258	1,258
L03	CL	131	162	204	317	457	614	770	790	815	843	873
L04	CL	135	135	138	152	167	182	197	207	216	224	236
L05	ETJ	9	9	9	9	15	24	36	50	65	83	103
L06	ETJ	51	68	91	113	126	127	128	128	128	128	128
L07	CL	0	0	6	18	30	35	38	38	38	38	38
M01	ETJ	0	0	0	0	0	0	0	0	0	0	0

*2022 Estimate based on actual housing counts from November 2022

CL = inside city limits; ETJ = within extra-territorial jurisdiction

HOUSING UNIT PROJECTIONS BY JURISDICTIONAL AREA

FULSHEAR, TEXAS



Projected New Housing Units Added Annually

Area	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
City	-	1,051	1,216	1,214	973	721	713	426	449	510	463
ETJ	-	1,345	1,891	2,014	2,025	2,219	2,418	2,546	2,497	2,371	2,035
City + ETJ	-	2,396	3,107	3,228	2,998	2,940	3,131	2,972	2,946	2,881	2,498

Projected Housing Units

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City	6,994	8,045	9,261	10,475	11,448	12,169	12,882	13,308	13,757	14,267	14,730
ETJ	10,437	11,782	13,673	15,687	17,712	19,931	22,349	24,895	27,392	29,763	31,798
City + ETJ	17,431	19,827	22,934	26,162	29,160	32,100	35,231	38,203	41,149	44,030	46,528

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



Land Use: [SF] Single-Family; [MF] Multi-Family; [C] Condo; [M] Mobile Homes; [RV] RV Park; **Developing SF/C/M/RV;** **Developing MF; Age-Restricted; Planned;** Potential; **Lot/Unit Status:** [Occ] Occupied; [Av] Available; [UC] Under Construction; [VDL] Vacant Developed Lots

PU	Name	Development	Land Use Notes	Lot/Unit Status					Projected Housing Occupancies													
				Total Units	Occ.	Av.	UC	VDL	Nov 2022–Oct 2023	Oct 2023–Oct 2024	Oct 2024–Oct 2025	Oct 2025–Oct 2026	Oct 2026–Oct 2027	Oct 2027–Oct 2028	Oct 2028–Oct 2029	Oct 2029–Oct 2030	Oct 2030–Oct 2031	Oct 2031–Oct 2032	Nov 2022–Oct 2027	Oct 2027–Oct 2032	Nov 2022–Oct 2032	Build-Out Post 2032
A01	Stone Hill Ranch	SF		85	70	0	1	14	1	0	1	1	1	0	1	0	0	1	4	2	6	9
A01	Summerview	SF	Currently clearing & leveling & adding in infrastructure - builder: M/I Homes	414	0	0	0	0	37	83	127	122	43	2	0	0	0	0	412	2	414	0
A01	Laurel Farms (possible LCISD site)	SF	A preliminary plat was approved for the first section of a new development; Sec. 1 has 217 lots; altogether ~650 lots could be developed on 183 ac. however LCISD has proposed using eminent domain to build schools here; it is unclear if the plat approval could prevent the condemnation	0	0	0	0	0	0	5	35	65	75	80	105	105	105	75	180	470	650	0
A01	Vanbrooke	SF	Builders: Anglia, Westin, Lakewood & Lake Ridge Builders; future plans for 7 estate lots on ~10 acres	599	535	19	3	35	45	14	4	1	0	0	0	0	0	0	64	0	64	0
A01		SF		0	0	0	0	0	0	0	4	9	12	16	20	22	24	26	25	108	133	370
A01		SF		0	0	0	0	0	0	0	0	5	10	15	20	20	20	20	15	95	110	80
A02	Fulshear Lakes	SF	Plats have been received for 684 lots south of future Lou Waters Pkwy.; Sam Yager Inc. is developing this community on 490 total acres + mixed use; 9 builders in first phase	684	0	0	0	0	43	117	149	169	130	70	6	0	0	0	608	76	684	0
A02	Fulshear Lakes	SF	Another 183 acres remains unplatted north of future Lou Waters Pkwy.	516	0	0	0	0	0	0	0	0	55	115	171	138	37	0	55	461	516	0
A02	Fulshear Lakes MF	MF	Plans for max. 400 MF units, along w/ comm. N. on FM 1093	0	0	0	0	0	0	0	0	0	0	75	75	75	75	75	0	375	375	0
A03	Fulshear Center	MF	Approximately 17 of 125 acres is planned for multi-family so expect 350-500 units	0	0	0	0	0	0	45	90	90	90	90	0	0	0	0	315	90	405	0
A03	Fulshear Center	SF	Approximately 22 of 125 acres is planned for SF residential so expect 70-90 lots	0	0	0	0	0	0	8	20	20	20	15	0	0	0	0	68	15	83	0
A03	Potential Mixed Use	MF	68+ acres adjacent and west of downtown Fulshear is likely to become a mix of denser land uses; no known plans at this time	0	0	0	0	0	0	0	0	0	10	13	18	20	24	26	10	101	111	380
A04	Polo Ranch	SF	Developer: Century Communities	783	740	35	8	0	41	2	0	0	0	0	0	0	0	0	43	0	43	0
A05	Del Webb Fulshear	SF	The community broke ground in Fall 2021	725	0	0	15	100	40	45	55	65	100	100	105	105	105	5	305	420	725	0

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



Land Use: [SF] Single-Family; [MF] Multi-Family; [C] Condo; [M] Mobile Homes; [RV] RV Park; **Developing SF/C/M/RV;** **Developing MF; Age-Restricted; Planned;** Potential; **Lot/Unit Status:** [Occ] Occupied; [Av] Available; [UC] Under Construction; [VDL] Vacant Developed Lots

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A05	Pecan Ridge	SF	Developed by Tri Pointe; infrastructure going in for first sections along Rogers Rd.	792	0	0	19	239	81	124	152	155	146	131	3	0	0	0	658	134	792	0
B01	Muske Tract	SF	Patricia Muske has 187.2 ac. that could easily be assembled into the Tamarron development and could have 500-600 lots	0	0	0	0	0	0	0	0	20	40	55	65	70	100	130	60	420	480	70
B01	Tamarron West	SF	Developer/builder: D.R. Horton	1,882	48	33	71	297	159	177	253	250	255	255	235	197	50	3	1,094	740	1,834	0
B01	Tamarron West	SF	Developer/builder: D.R. Horton	1,714	0	0	8	276	51	113	149	198	188	216	221	249	215	114	699	1,015	1,714	0
B01	Tamarron West MF	MF	Two MF tracts of 15 acres each have been designated on the Tamarron West land plan; one of these properties is in this PU	0	0	0	0	0	0	0	0	55	55	55	55	55	50	0	110	215	325	0
B01	Tamarron West MF	MF	Two MF tracts of 15 acres each have been designated on the Tamarron West land plan; one of these properties is in this PU	0	0	0	0	0	0	0	0	45	75	80	80	45	0	0	120	205	325	0
B02	Canvas on Founders Hill BTR	SF	Clearing and leveling land now; Developer: Watermark; a mix of 1-4 bedroom rental units will be built	160	0	0	0	0	46	84	30	0	0	0	0	0	0	0	160	0	160	0
B02	Enclave at Fulshear	MF	Multiple land owners have ~140 acres along FM 359 that have high potential for commercial and MF development long-term	0	0	0	0	0	0	0	50	70	70	70	75	80	80	80	190	385	575	250
B02	Potential Mixed Use	MF	Expect future TH and denser MF + SF dev. on tracts in this PU especially along Huggins Rd. or surrounding the downtown area; ~300 acres of land in the southern portion of this PU are undeveloped or underutilized; if half becomes MF/TH, PASA expects ~1,60	0	0	0	0	0	0	5	30	50	60	85	105	110	115	140	145	555	700	900
B02	Potential Residential	SF	Approximately 300 acres in this PU have potential for MF/denser SF development (includes part of the Huggins Ranch tract)	2,100	0	0	0	0	0	0	0	0	0	20	75	100	150	170	0	515	515	1,585
B03	Cross Creek West	SF	Clearing and leveling parcels, adding in infrastructure for 3,500 SF lots (~1,300 lots in the southern tract and 2,200 in the northern tract; over 400 lots are being developed now in Sec 1-5 with an early 2022 delivery to builders	1,309	0	10	86	314	141	215	213	227	229	190	90	4	0	0	1,025	284	1,309	0

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



Land Use: [SF] Single-Family; [MF] Multi-Family; [C] Condo; [M] Mobile Homes; [RV] RV Park; Developing SF/C/M/RV; Developing MF; Age-Restricted; Planned; Potential; Lot/Unit Status: [Occ] Occupied; [Av] Available; [UC] Under Construction; [VDL] Vacant Developed Lots

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B03	Huggins Ranch Tract	SF	Huggins Ranch Ltd. has ~450 ac. all E. of FM 359; PASA expects mostly SF north of future Fulshear Bend Dr.; could potentially have access through smaller tracts to FM 1093; long-term, Jordan Ranch Blvd. is planned through the east side of the larger parc	0	0	0	0	0	0	0	0	20	35	45	60	80	95	115	55	395	450	385
B04	Potential Future MF	MF	CoF has seen interest in at least 1 MF property along TX Heritage just south of the Broadstone Cross Creek property; PASA believes 1 additional MF property could be built here as well but later in the proj. period	0	0	0	0	0	0	105	130	115	0	0	0	0	0	0	350	0	350	350
B05	Cross Creek West	SF	3,500 SF lots (~1,300 lots in the southern tract and ~2,200 in the northern tract; development in this northern tract is likely within 4-5 years; there is potential for MF development in the northern tract as well but no specific plans as of yet	2,200	0	0	0	0	0	0	0	30	230	300	400	450	450	230	260	1,830	2,090	110
B05	Cross Creek West MF	MF	There is potential for MF development here but later in the projection period	0	0	0	0	0	0	0	0	0	0	5	60	75	90	100	0	330	330	300
B06	Henriksen Tract	SF	Henriksen has over 500 acres west of Texas Heiritage Pkwy. likely to become SF residential	0	0	0	0	0	0	0	10	45	100	130	165	175	180	200	155	850	1,005	255
B06	Potential MF	MF	A portion of the Henriksen Tract along Texas Heritage Pkwy. or Jordan Ranch Blvd. will likely become comm/MF long-term at Morgan's Spur intersection; but no known plans at this time	0	0	0	0	0	0	0	0	45	60	70	85	95	95	100	105	445	550	50
C01	Broadstone Jordan Ranch	MF	Alliance is developing 334 units at 29655 Jordan Crossing; (67% 1-br, 29% 2-br, 4% 3-br)	334	0	0	0	0	115	192	27	0	0	0	0	0	0	0	334	0	334	0
C01	Future Jordan Ranch	SF	Approximately 130 acres remains unplatted along Jordan Road; expect ~400 additional lots here	400	0	0	0	0	0	0	0	35	125	170	70	0	0	0	160	240	400	0
C01	Hickory Bend	SF	Builders: Perry, Highland & J.Patrick Homes	510	154	92	87	111	235	117	4	0	0	0	0	0	0	0	356	0	356	0

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



Land Use: [SF] Single-Family; [MF] Multi-Family; [C] Condo; [M] Mobile Homes; [RV] RV Park; **Developing SF/C/M/RV:** **Developing MF:** **Age-Restricted;** **Planned;** Potential; **Lot/Unit Status:** [Occ] Occupied; [Av] Available; [UC] Under Construction; [VDL] Vacant Developed Lots

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C01	Jordan Ranch Sec. 34 & 43-49	SF	Based on a concept plan from 2021 - 2,955 total lots with 2,796 in LCISD; the developer has a concept plan for ~1,226 future lots on the remaining land (remainder in 2P) in LCISD; Prelim. plats were submitted in 2021 for 422 lots in Sec. 35-41; these wil	638	0	0	40	22	48	14	125	220	195	36	0	0	0	0	602	36	638	0
C01	Jordan Ranch Sec. 35-41	SF	Streets & infrastructure going in; about to start home construction in sections that are ready	422	0	0	0	154	43	157	185	35	2	0	0	0	0	0	422	0	422	0
C01	Lantana Ridge	SF	Builders: Lennar, J.Patrick, Perry, Westin, Chesmar & David Weekley Homes	344	337	4	3	0	7	0	0	0	0	0	0	0	0	0	7	0	7	0
C01	Sunset View	SF	Builders: J.Patrick, Westin, Highland, Chesmar, Perry, David Weekley & Lennar Homes	246	245	1	0	0	1	0	0	0	0	0	0	0	0	0	1	0	1	0
C01	Vic at Jordan Ranch	MF	Hunington is now developing 365 units at 2011 Texas Heritage; (75% 1-br/eff., 25% 2-br)	365	0	0	0	0	0	190	175	0	0	0	0	0	0	0	365	0	365	0
F01	Tamarron Sec. 57	SF	Small model home park; builder: D.R. Horton Homes	8	0	3	0	5	0	0	1	2	2	3	0	0	0	0	5	3	8	0
F02	Heritage Cove BTR	SF	D.R. Horton built this section for rent; leasing agent stated 47% occupied	259	121	138	0	0	138	0	0	0	0	0	0	0	0	0	138	0	138	0
F02	Tamarron - Sec 28	SF	Builder: D.R. Horton Homes	21	14	0	0	7	2	4	1	0	0	0	0	0	0	0	7	0	7	0
F02	Tamarron Sec. 45A, 45B, 48, 52 & 55	SF	585 lots have been platted in Sec. 45, 48, 52, and 55; utility work is ongoing; Tamarron Point will connect this section with the Tamarron West development currently in early development stages along Woods Rd.	595	110	51	26	408	187	212	84	2	0	0	0	0	0	0	485	0	485	0
F03	Harrison Interests	SF	Approximately 400 acres of the Harrison Tract could become SF long-term; no known plans at this time	0	0	0	0	0	0	0	20	40	60	80	80	90	150	175	120	575	695	400
F03	Harrison Interests	MF	Harrison is likely to retain commercial property along Texas Heritage; retail and MF could go in on upwards of 100 acres facing the parkway long-term	0	0	0	0	0	0	0	0	50	65	85	105	105	105	110	115	510	625	190

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



Land Use: [SF] Single-Family; [MF] Multi-Family; [C] Condo; [M] Mobile Homes; [RV] RV Park; **Developing SF/C/M/RV;** **Developing MF; Age-Restricted;** **Planned;** Potential; **Lot/Unit Status:** [Occ] Occupied; [Av] Available; [UC] Under Construction; [VDL] Vacant Developed Lots

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F04	Weiss Sand & Clay Tract	SF	potential for eventual SF development on this tract	0	0	0	0	0	0	0	0	0	50	50	50	50	50	0	50	200	250	0
F06	Tamarron	SF	DR Horton planned additional single-family on ~20 acres north of Tamarron Pkwy +/- 10 additional acres of flex that could be single family, multi-family, or commercial; no plat yet	0	0	0	0	0	7	35	46	0	0	0	0	0	0	0	88	0	88	0
F06	Tamarron MF II	MF	~16 acres is now planned for apartments at the NWC of FM 1463 and Tamarron Pkwy; infrastructure going in now	0	0	0	0	0	0	50	170	130	0	0	0	0	0	0	350	0	350	0
F06	Tamarron Sec. 54 THs	SF	DR Horton developing single-family townhomes on tis ~21 acres south of Tamarron Parkway	172	2	1	5	164	25	63	75	9	0	0	0	0	0	0	172	0	172	0
F06	Whitmar Trail	SF		161	120	23	18	0	38	3	0	0	0	0	0	0	0	0	41	0	41	0
H04	Quail Point	SF		45	44	1	0	0	1	0	0	0	0	0	0	0	0	0	1	0	1	0
H09	Alders Cross Creek	MF	a new senior apartment building is nearing completion	172	0	0	0	0	85	87	0	0	0	0	0	0	0	0	172	0	172	0
H09	Cottages THs	SF	56 townhomes under development by Highland Homes	56	0	0	21	35	19	32	5	0	0	0	0	0	0	0	56	0	56	0
H10		SF	Landmark Industries has 8 acres that could evolve into residential over time; no known plans at this time	0	0	0	0	0	0	0	15	15	15	15	15	0	0	0	45	30	75	0
H19	Broadstone Cross Creek	MF	Alliance Residential is developing a 348-unit apartment property on 14.6 ac. at the SWC of Fulshear Bend/Texas Heritage; the property will have majority 1-bedroom units	348	0	0	0	0	85	225	38	0	0	0	0	0	0	0	348	0	348	0
H19	Creek Rush	SF	Builders: TriPointe, Newmark, Perry, Highland & Partners in Building	469	11	37	42	148	89	116	143	106	4	0	0	0	0	0	458	0	458	0
H19	Fairview	SF	Duplexes - builder: Lennar Homes	112	28	10	14	2	24	32	28	0	0	0	0	0	0	0	84	0	84	0
H19	Sycamore Point	SF	Builders: TriPointe & Perry Homes	60	2	5	5	48	32	23	3	0	0	0	0	0	0	0	58	0	58	0
H19	Turning Creek	SF	Builders: Perry & Chesmar Homes	80	19	7	15	39	46	15	0	0	0	0	0	0	0	0	61	0	61	0
H19	Venterra Cross Creek	MF	Venterra Realty is planning multi-family at the NWC of Texas Heritage and Fulshear Bend	312	0	0	0	0	0	35	200	77	0	0	0	0	0	0	312	0	312	0
H20	Argonne, The	MF	Judwin is nearing completion of 296 units at 6636 Argonne; 1-3 bedroom units	296	0	0	0	0	220	76	0	0	0	0	0	0	0	0	296	0	296	0

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



Land Use: [SF] Single-Family; [MF] Multi-Family; [C] Condo; [M] Mobile Homes; [RV] RV Park; **Developing SF/C/M/RV;** **Developing MF; Age-Restricted;** **Planned;** Potential; **Lot/Unit Status:** [Occ] Occupied; [Av] Available; [UC] Under Construction; [VDL] Vacant Developed Lots

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H20	Bonterra	SF	Concept plan shows 738 total lots; builder: Taylor Morrison Homes	738	396	22	62	120	80	80	80	80	22	0	0	0	0	0	342	0	342	0
H20	Creek Trace	SF	All north of Morgan Spur Rd.; builders: Perry, Newmark, Highland, Chesmar & TriPointe Homes	403	376	16	11	0	27	0	0	0	0	0	0	0	0	0	27	0	27	0
I01	Harrison Tract	SF	No new activity to discuss; several purchase attempts have not been successful but the potential for development remains strong as raw land becomes scarce	0	0	0	0	0	0	0	0	15	40	55	80	100	135	160	55	530	585	7,140
I01	Harrison Tract	MF	The north 600 ac. of the Harrison tract will likely dev. as comm. with MF/retail components; no plans or owner yet, but expect upwards of 3,000 MF or TH units to dev. over the next few decades	0	0	0	0	0	0	0	0	0	0	45	65	70	85	100	0	365	365	2,800
J01	Foster Crossing	SF		40	35	0	1	4	1	1	0	0	1	0	0	1	0	0	3	1	4	1
J01	Karaugh	SF		31	23	0	1	7	1	0	1	0	0	1	0	0	0	0	2	1	3	5
J01	Potential SF	SF	Some residential development could occur along FM 359 in this PU	0	0	0	0	0	0	0	0	5	10	15	23	25	27	30	15	120	135	470
J01	Whispering Oaks	SF	Builder: CRV Homes	76	61	0	2	13	2	1	2	1	0	1	0	1	0	1	6	3	9	6
K01	Foster Farms Inc. Tract	SF	Approximately 1,500 acres of this 5,000+ acre tract could be developed without a levee but perhaps with some flood plain mitigation	0	0	0	0	0	0	0	0	40	65	90	135	170	190	220	105	805	910	4,100
K01	LaPrada Landing	SF		9	1	0	1	7	1	0	1	0	1	0	0	0	1	0	3	1	4	4
K01		SF	A large swath of property north of the Brazos River in this PU is not developable because it lies in the Brazos River floodway and flood plain	0	0	0	0	0	0	0	0	0	0	0	10	15	24	30	0	79	79	670
L06	Fulbrook	SF	Sections: Fulbrook Creeks, Churchill, The Commons, Woodshore, Oxbow Lake, Pecan Reserve & River Cliff ; builders: Fairmont, Courtland Builders, Ron Carroll, Arrow & Daybreak Homes	445	368	0	17	60	17	23	22	13	1	1	0	0	0	0	76	1	77	0

Projected Housing Occupancies

City of Fulshear, November 2022–October 2032



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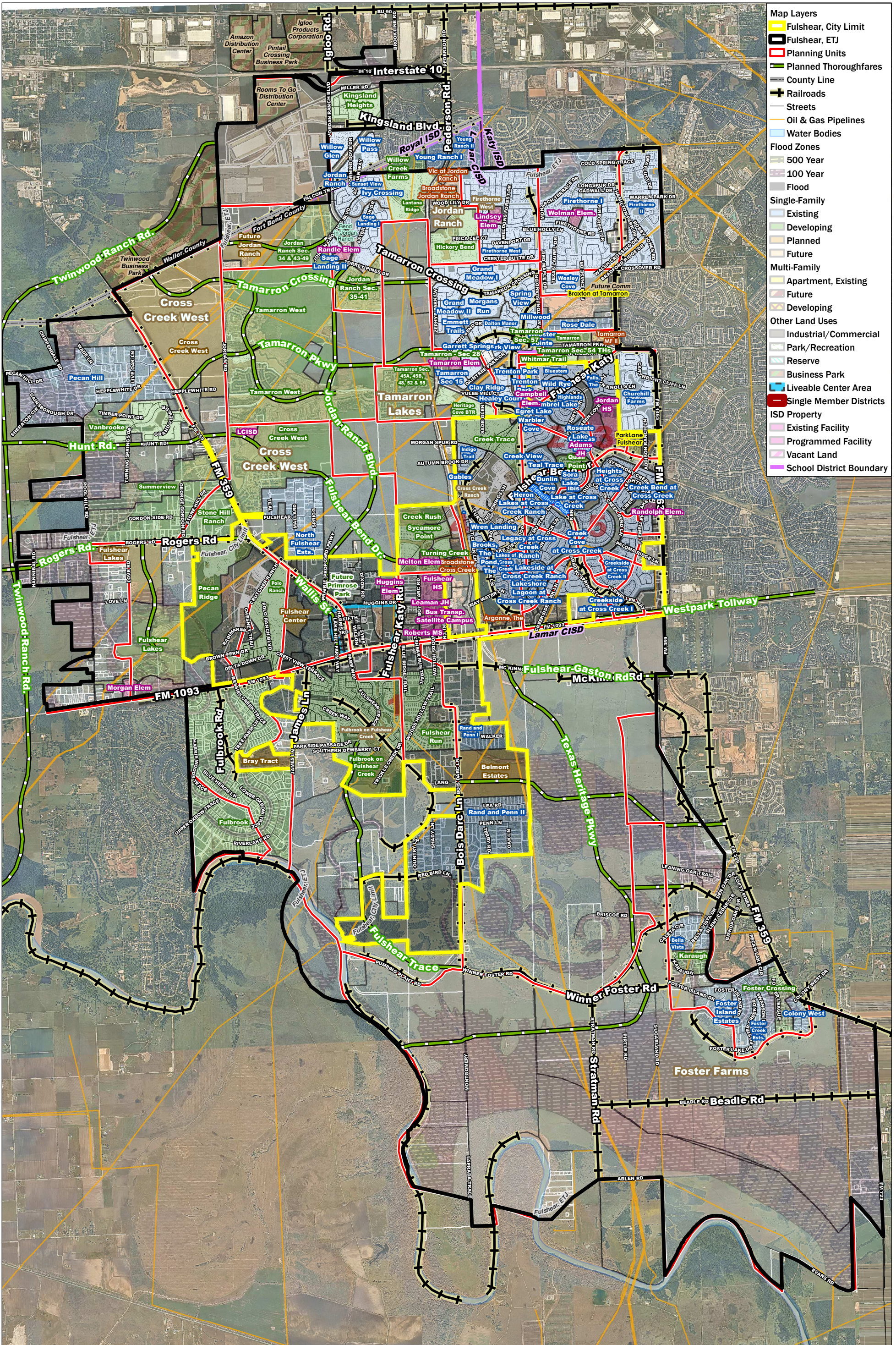
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L02	Fulbrook on Fulshear Creek	SF	Concept plan from 12/2021; originally it was 984 lots, in 2018 a concept plan for 1,171 lots; formerly Fulshear Creek Crossing; Fulshear Trace is being built through here; builders: Perry, Drees, Newmark, Highland & Empire Homes	1,258	802	25	31	226	104	131	136	78	7	0	0	0	0	0	456	0	456	0
L03	Fulshear Lake	MF	A maximum of 330 units is allowed on the 18-acre tract owned by Fulshear Real Est. Partners; a mix of retail/MF is planned	330	0	0	0	0	0	0	80	85	85	80	0	0	0	0	250	80	330	0
L03	Fulshear Run	MF	Dev. Agreement allows 400 MF units; the MF site planned will likely have 200 or fewer units	0	0	0	0	0	0	0	25	55	60	60	0	0	0	0	140	60	200	0
L03	Fulshear Run	SF	Builders: TriPointe & Partners in Building	212	131	15	30	36	31	42	8	0	0	0	0	0	0	0	81	0	81	0
L03	Pickard Tract	SF		0	0	0	0	0	0	0	0	0	12	16	20	25	28	30	12	119	131	150
L04	Belmont Estates	SF	Recently platted for 2-acre lots	77	0	0	0	0	0	3	14	15	15	15	10	5	0	0	47	30	77	0
L04	Highland Management Tract	SF	1-acre lots are likely on over 1,200 acres with Brazos River access; long-term development potential	0	0	0	0	0	0	0	0	0	0	0	0	4	8	12	0	24	24	900
L05		SF	Harrison Interests Ltd. and Multiple Owners have approximately ~436 ac. S. of Fulbrook at Fulshear Creek; the City wants this area reserved for 1-acre lots so there could be 525 lots here; no MUDs are planned here yet	0	0	0	0	0	0	0	0	4	6	9	10	11	13	15	10	58	68	465
L05		SF		0	0	0	0	0	0	0	0	2	3	3	4	4	5	5	5	21	26	95
L07	Bray Tract	SF	Fred Bray has 69.3 ac. that is now being planned for 38 lots by Tri Pointe Homes	0	0	0	0	0	0	6	12	12	5	3	0	0	0	0	35	3	38	0

Residential Development Overview

City of Fulshear

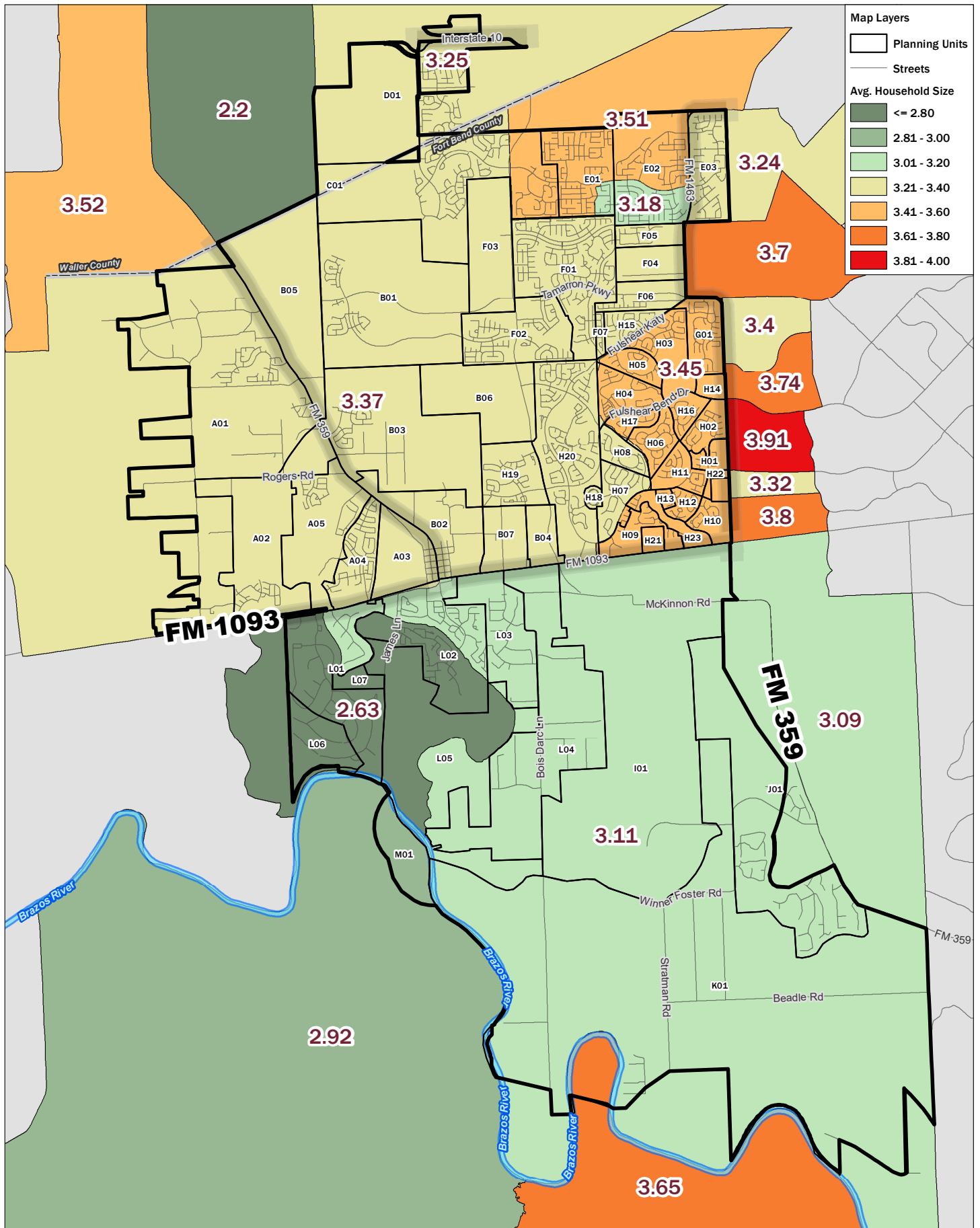


0 0.5 1 2 Miles



Average Household Size by Block Group

City of Fulshear: City Limits and ETJ



Source: US Census Bureau

PROJECTED POPULATION BY YEAR
FULSHEAR JURISDICTION AND SINGLE MEMBER DISTRICTS



Area	2022 Est.	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
City	23,397	26,181	29,262	32,375	34,883	36,709	38,629	39,911	41,275	42,852	44,418
ETJ	35,435	40,236	46,189	52,679	59,547	67,475	76,024	84,919	93,691	102,077	109,315
City + ETJ	58,832	66,417	75,451	85,054	94,430	104,184	114,653	124,830	134,966	144,929	153,733
SINGLE MEMBER DISTRICTS											
District 1	7,400	8,452	9,861	11,678	13,414	15,093	16,896	18,070	19,326	20,793	22,249
District 2	3,324	3,344	3,360	3,376	3,392	3,408	3,424	3,440	3,456	3,472	3,488
District 3	3,756	3,775	3,794	3,813	3,832	3,852	3,872	3,892	3,912	3,932	3,952
District 4	5,620	7,297	8,899	10,107	10,791	10,870	10,924	10,978	11,032	11,088	11,144
District 5	3,297	3,313	3,330	3,347	3,364	3,381	3,398	3,415	3,432	3,449	3,466

City of Fulshear Population Growth Scenarios, City Limits and ETJ

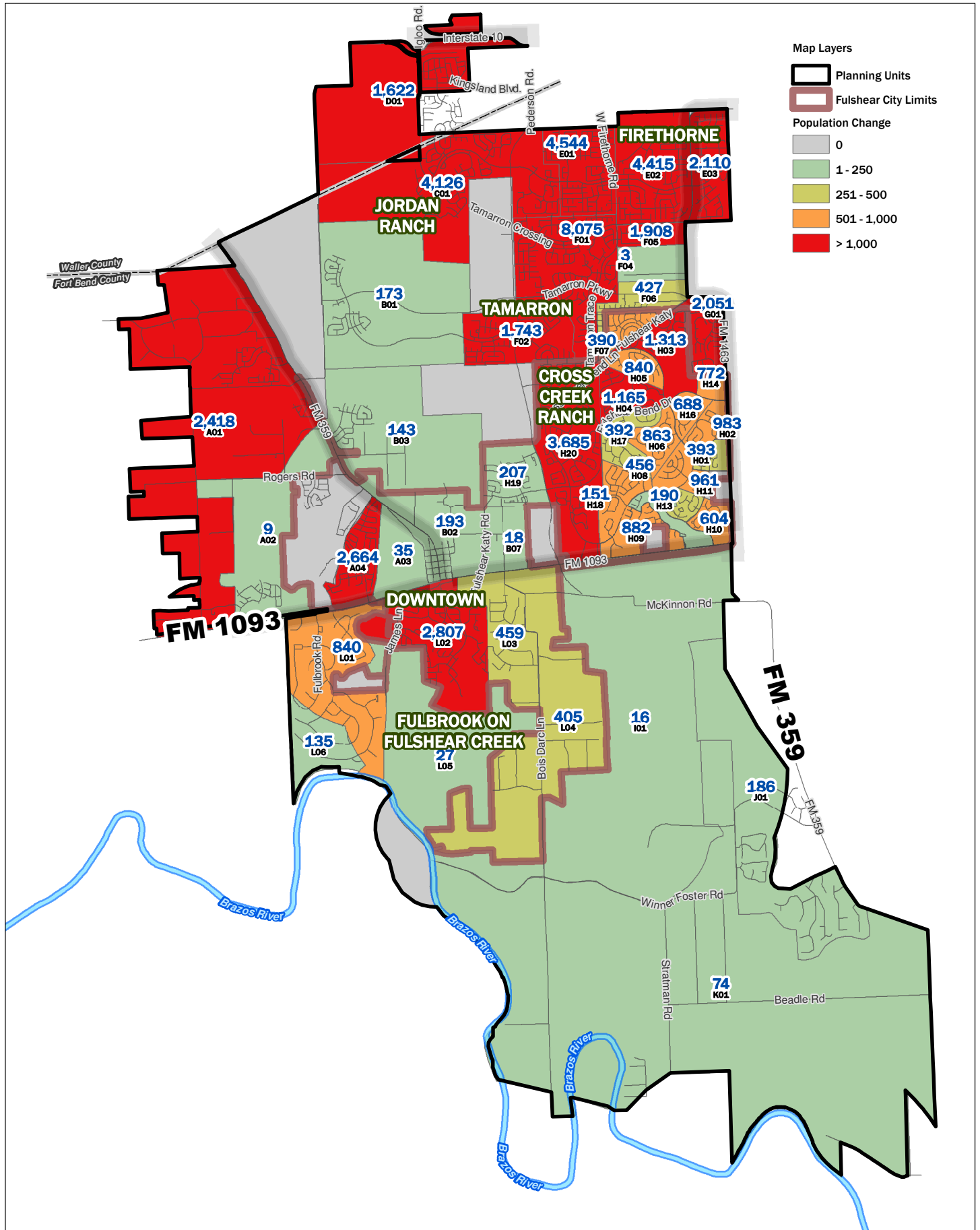


		2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
CITY LIMITS	Low										
	Population	25,396	28,238	31,080	33,313	34,874	36,620	37,756	38,881	40,281	41,664
	% Growth	0.09	0.11	0.10	0.07	0.05	0.05	0.03	0.03	0.04	0.03
	Growth	1,999	2,842	2,842	2,233	1,560	1,747	1,136	1,125	1,400	1,383
	Moderate										
	Population	26,181	29,262	32,375	34,883	36,709	38,629	39,911	41,275	42,852	44,418
	% Growth	0.12	0.12	0.11	0.08	0.05	0.05	0.03	0.03	0.04	0.04
	Growth	2,784	3,081	3,113	2,508	1,826	1,920	1,282	1,364	1,577	1,566
	High										
	Population	26,966	30,286	33,670	36,453	38,544	40,754	42,226	43,752	45,509	47,261
	% Growth	0.15	0.12	0.11	0.08	0.06	0.06	0.04	0.04	0.04	0.04
	Growth	3,569	3,320	3,384	2,783	2,092	2,209	1,472	1,526	1,757	1,752

		2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
ETJ	Low										
	Population	39,029	44,572	50,572	56,867	63,427	68,422	73,880	81,511	88,807	95,104
	% Growth	0.10	0.14	0.13	0.12	0.12	0.08	0.08	0.10	0.09	0.07
	Growth	3,594	5,543	5,999	6,296	6,559	4,995	5,458	7,632	7,296	6,297
	Moderate										
	Population	40,236	46,189	52,679	59,547	67,475	76,024	84,919	93,691	102,077	109,315
	% Growth	0.14	0.15	0.14	0.13	0.13	0.13	0.12	0.10	0.09	0.07
	Growth	4,801	5,953	6,490	6,868	7,928	8,549	8,895	8,772	8,386	7,238
	High										
	Population	41,443	47,806	54,786	62,486	71,522	81,430	91,725	101,987	111,995	120,935
	% Growth	0.17	0.15	0.15	0.14	0.14	0.14	0.13	0.11	0.10	0.08
	Growth	6,008	6,363	6,981	7,699	9,036	9,909	10,295	10,262	10,007	8,940

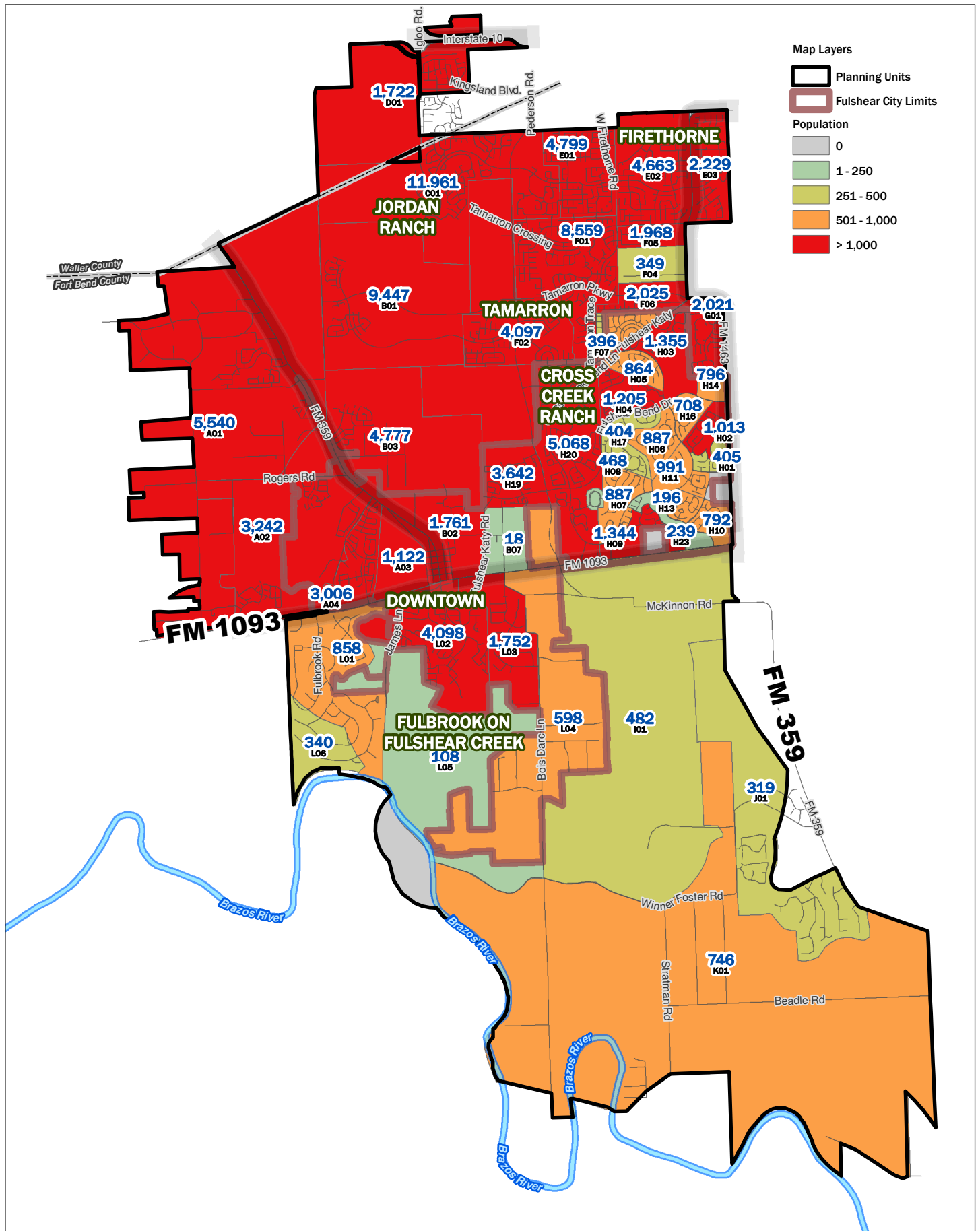
Population Estimates by Planning Unit

City of Fulshear - 2022



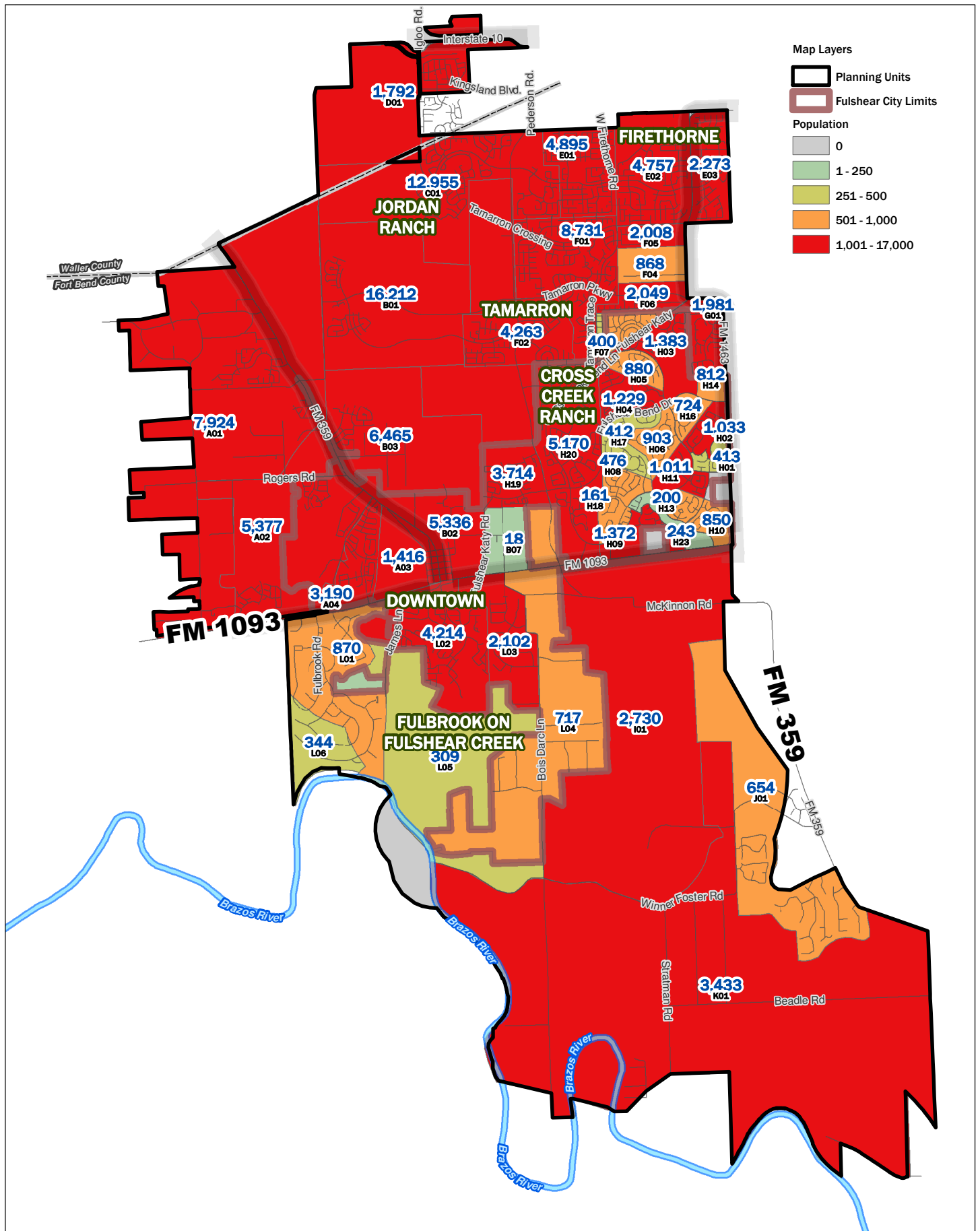
Projected Population in 2028

By Planning Unit



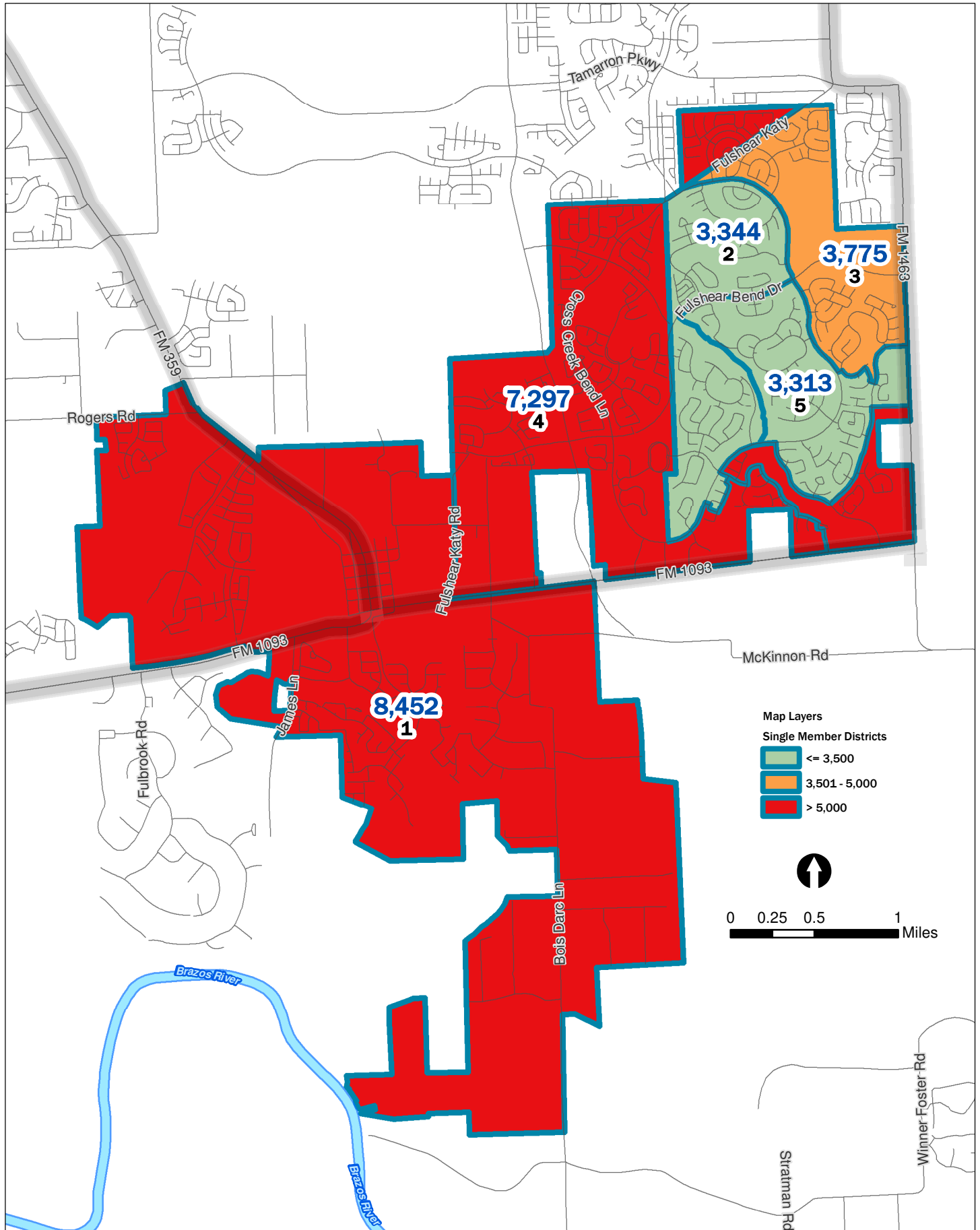
Projected Population in 2032

By Planning Unit



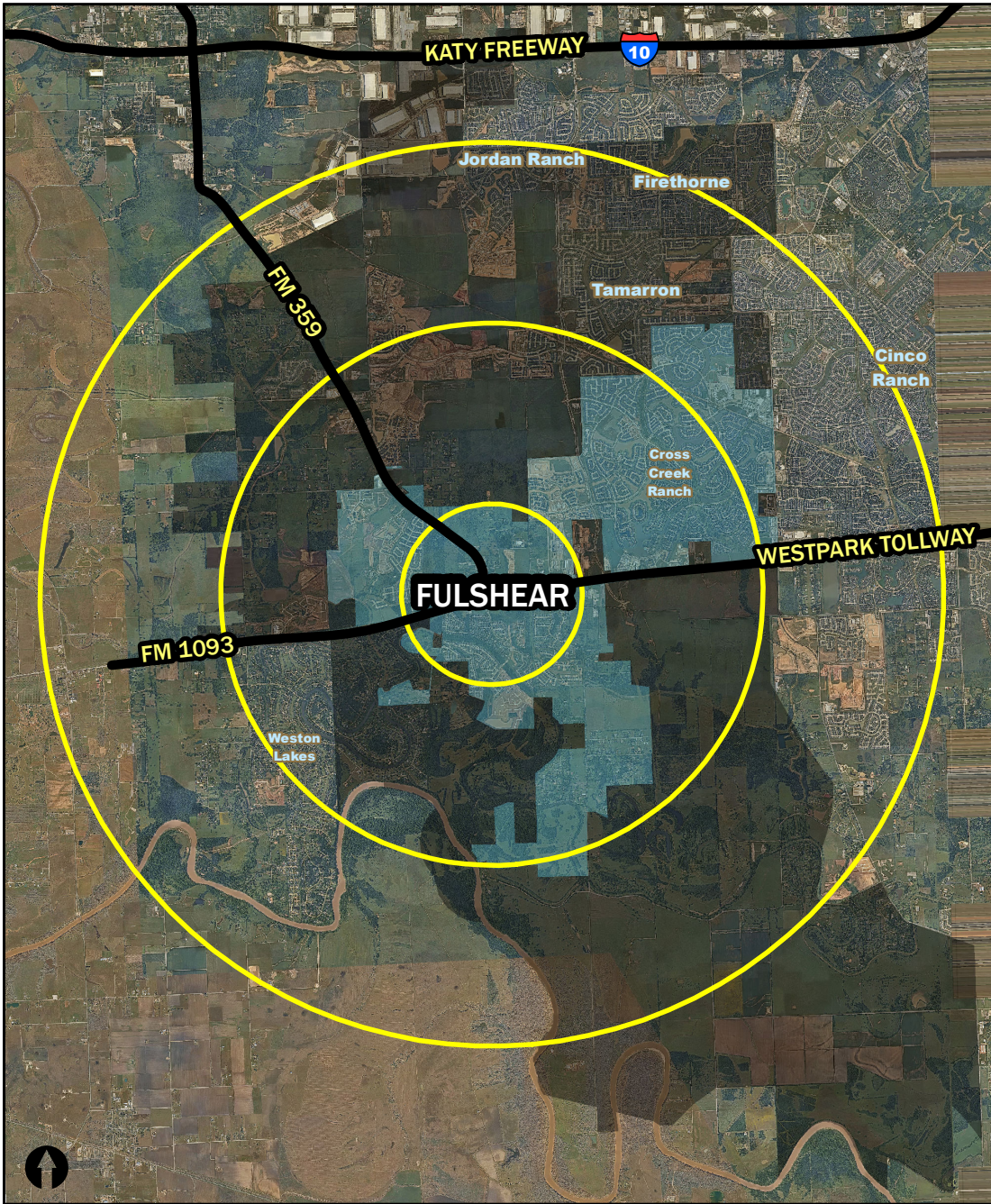
Population Projections 2023

Single Member Districts



Fulshear Demographics

Downtown Fulshear Trade Area



City of Fulshear Demographic Profile

Age	
Under 5 years	4.5%
5 to 19 years	31.8%
20 to 24 years	3.9%
25 to 34 years	5.2%
35 to 54 years	38.1%
55 to 74 years	14.6%
75 years and over	1.9%

Population 25 and Over:	75.5%
Bachelor's Degree or Higher	

Owner-Occupied Housing	93.9%
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Three or More Vehicles in Household	26.3%
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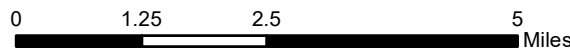
Median Housing Value	\$445,500
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Unemployment Rate	5.5%
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Mean Travel Time to Work (Minutes)	37.6
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Median Household Income	\$170,236
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Source: U.S. Census Bureau, 2021 American Community Survey, 5-Year Estimates



Trade Area Population

	2022 Estimate	2023 Projected	2027 Projected	2032 Projected
1-mile	3,512	4,026	7,744	13,086
3-mile	20,040	24,662	43,378	63,193
5-mile	102,980	111,475	158,180	220,940

- 1-, 3-, and 5-Miles
- Fulshear, City Limit
- Fulshear, ETJ