



ENERGY CORRIDOR DISTRICT

2025 Land Use, Residential and Employment Projections

February 2007

Prepared for:

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Introduction

This report will present the current and 2025 projections of land use, population, housing units and employment data for the Energy Corridor Study area and the larger Houston West Study Area.

The **first section** of this report includes a detailed analysis within the **Energy Corridor** (illustrated on Exhibit 1) including:

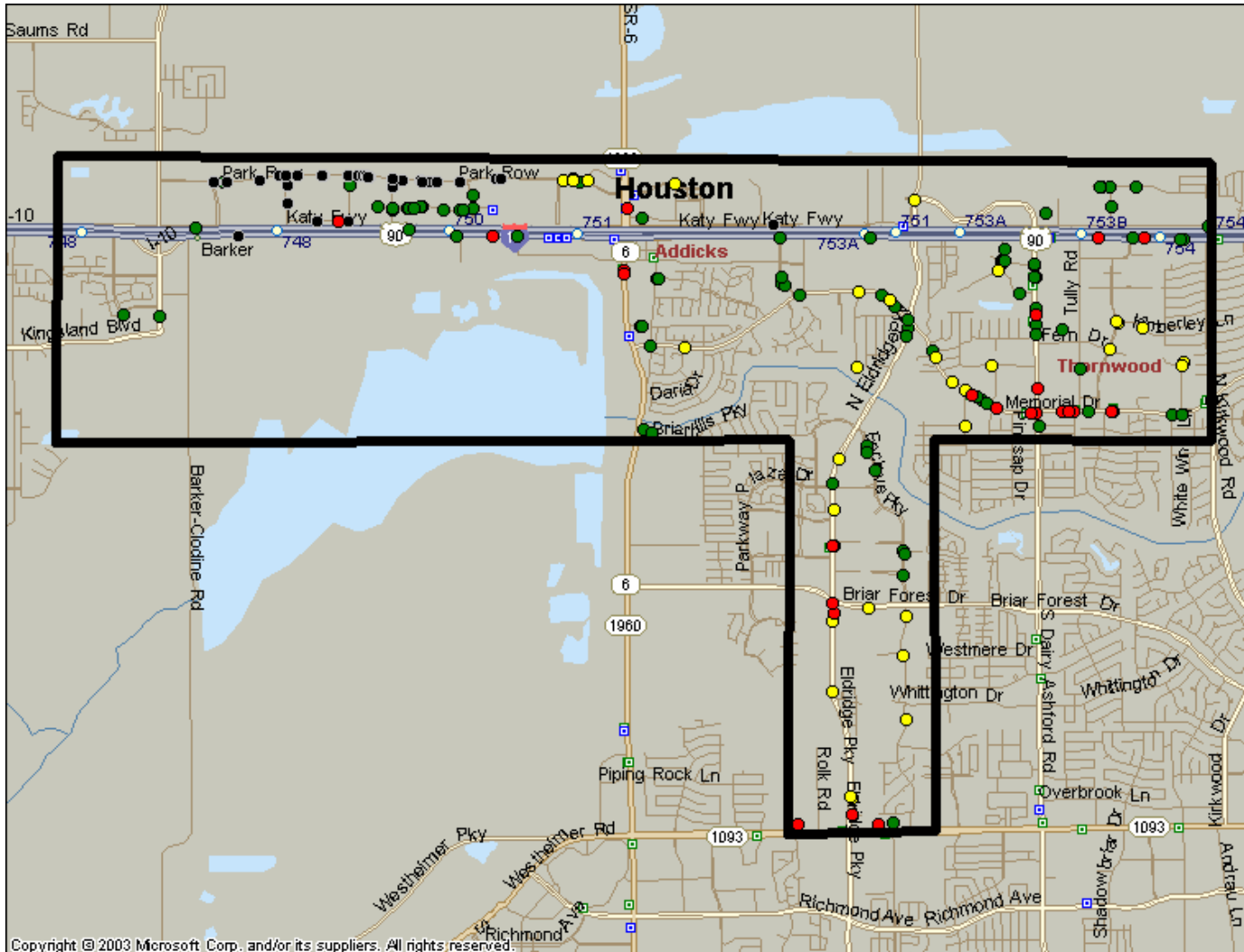
- The projected land uses within the geographic area commonly identified with the Energy Corridor including retail, office, warehouse/service center, single-family residential, multi-family residential and institutional uses
- A map of the corridor illustrating the existing and expected 2025 uses; and
- An estimate future population and employment by land use in the corridor.

The **second section** of the report includes a forecast for the much larger, **Houston West Study Area** (illustrated on Exhibit 2) including:

Use of the Houston-Galveston Area Council's recent population and employment forecasts by regional analysis zone (RAZ);

- A break down of the H-GAC population growth by single and multi-family housing units;
- A break down of the H-GAC employment forecast into the various land use categories; and
- A detailed forecast for the Houston West study area by H-GAC RAZ zones including the following data for 2006 and 2025 including: Single-family housing units; Multi-family housing units; Total population; Office building area; Retail building area; Warehouse/service center building area and Hospital and institutional building area.

Exhibit 1—the Energy Corridor study area –2006



LEGEND

- Apartment
- Industrial
- Office
- Retail

1. Energy Corridor Detailed Forecasts

The detailed forecast for the Energy Corridor area was accomplished by evaluating all parcels in the study area for current and projected use. Overall, CDS Market Research identified 7,130 parcels using the City of Houston GIMS database. Of those, almost 4,500 parcels were single family lots. The remaining 2,600 parcels include all other uses including commercial, industrial, multi-family and townhouses and even some land in the Addicks and Barker reservoirs.

Energy Corridor Housing and Population

Housing units were determined by determining the units within the boundaries of the study area (Exhibit 1): The table below illustrates the summary tabulation of housing units and estimated population using household size data from the area's *PCensus* demographic profile.

Table 1 – Housing Unit Estimates – Energy Corridor

Residential Use	Housing Units		Persons per Unit		Estimated Population	
	2006	2025	2006	2025	2006	2025
Single Family Detached	4,339	4,471	3.16	3.15	13,711	14,084
Townhouse	2,053	2,487	2.75	2.74	5,638	6,806
Apartment	12,581	17,704	1.86	1.84	21,931	32,575
Multi-Family Condo	476	596	2.25	2.21	1,071	1,317
Totals	19,449	25,258	2.25	2.17	43,829	54,791

Source: CDS Market Research

Energy Corridor Commercial Buildings and Employment

For the purposes of this analysis, the commercial development in the Energy Corridor Study Area was tabulated using the Houston-Galveston Area Council’s Regional Analysis Zones (RAZ) illustrated on Exhibit 3. The commercial and employment data in this section was broken into the RAZ zones for comparison with the H-GAC’s long range forecasts.

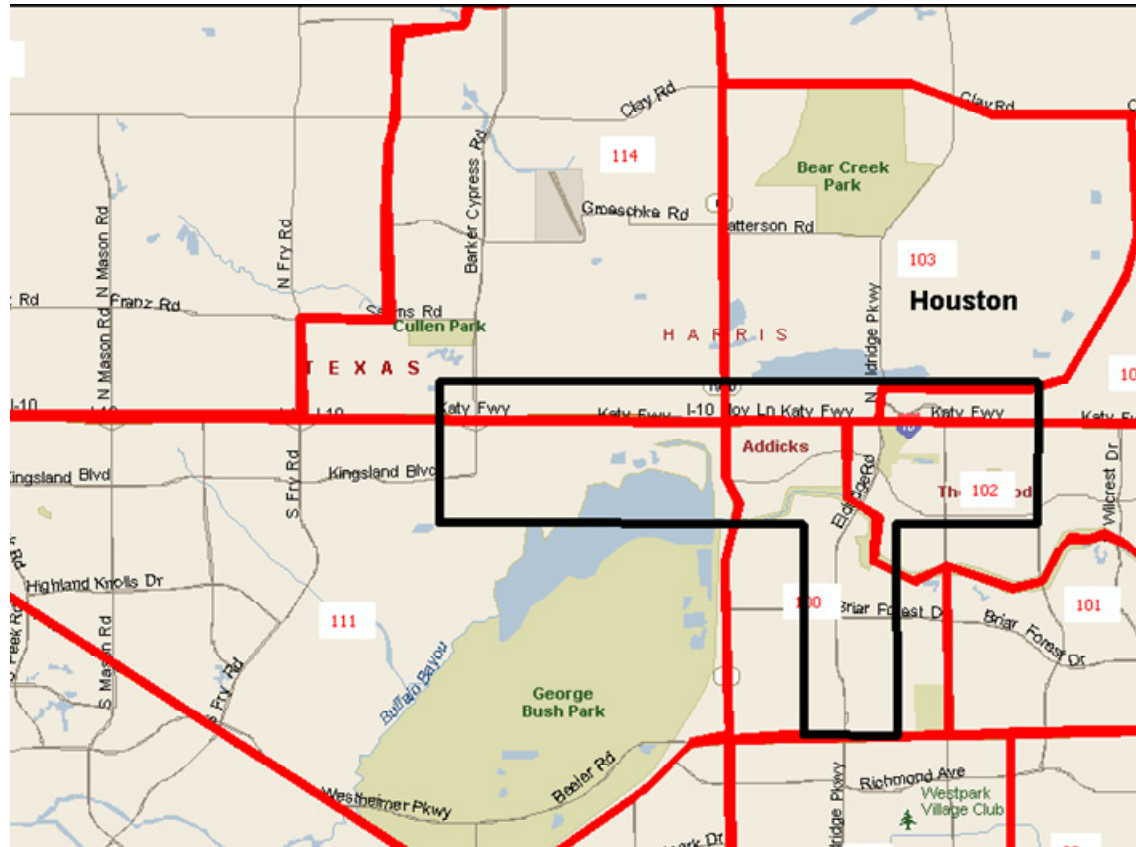
The following tables summarize the tabulations of existing and projected 2025 office, retail and industrial development within the Energy Corridor Study Area by RAZ. It is evident from Exhibit 3 that the Energy Corridor Study area comprises only a portion of each of the RAZ zones. This segmentation is provided only to assist the Energy Corridor District in providing updated forecast information to the Houston-Galveston Area Council and other forecasters.

Table 2 – Summary of Commercial Buildings – Energy Corridor

RAZ	Office Space, Square Feet		Retail Space, Square Feet		Industrial			
	2006	2025	2006	2025	Flex Space, Square Feet		Self Storage, Square Feet	
					2006	2025	2006	2025
100	7,146,003	9,870,152	762,375	1,380,625	10,726	10,726	80,600	260,600
102	3,210,671	3,251,682	2,104,327	2,256,247	7,611	7,611	207,048	209,130
103	306,890	1,676,890	163,604	221,420	0	0	0	0
104	2,584,169	4,129,322	21,740	16,840	0	0	0	0
111	692,717	692,717	521,897	1,160,245	5,000	0	0	0
114	2,717,906	3,879,245	240,016	800,316	2,509,469	2,554,884	0	0
Total	16,658,356	23,500,008	3,813,959	5,835,693	2,532,806	2,573,221	287,648	469,730

Source: CDS Market Research

Exhibit 3 – the Energy Corridor RAZ
Houston-Galveston Area Council Regional Analysis Zones (RAZ) Outlined in Red



Using the tabulations of square footage of commercial buildings (Table2), an estimate was made of the employment in each of these categories. This was accomplished by deriving estimates of the square foot per employee of the various land uses from published sources and reconciling the resultant values with employment estimates from the H-GAC.

Estimates of Square Feet per Employee (sf/e)

- For office facilities, the estimates of building area per employee in the Houston region range from:
 - over **300 sf/e** in the central business district to
 - **190 sf/e** in areas which have a concentration of engineering and call center jobs.
- For retail facilities, the estimates range from 160 sf/e in high volume retail centers to **450 sf/e** in suburban centers.
- For industrial facilities, estimates are difficult to obtain, so the region-wide estimate of **650 sf/e** was generally used.

For this analysis, the number of “square feet per employee” varied somewhat for each zone dependent upon the type of employment in the zone. The following table summarizes the estimates of employment in the Energy Corridor.

Table 3 – Summary of Commercial Employment in the Energy Corridor

RAZ	Office Employment		Retail Employment		Industrial Employment	
	2006	2025	2006	2025	2006	2025
100	25,521	35,251	2,541	4,602	25	43
102	10,357	10,489	4,209	4,512	32	33
103	1,023	5,590	327	443	0	0
104	9,571	15,294	72	56	0	0
111	1,979	1,979	1,491	3,315	8	0
114	9,060	12,931	686	2,287	5,019	5,110
Total	57,511	81,533	9,326	15,215	5,084	5,185

Source: CDS Market Research

Other Energy Corridor Buildings and Employment

In addition to the major commercial land uses and employment described in Tables 2 and 3, other uses in the study area include educational, government, and medical/hospital

Educational Uses and Employment

Table 4 – Schools in the Energy Corridor

School Facility	Address	Type	Students	Employees
West Briar Middle	13733 Brimhurst	Houston ISD	1,369	96
Bush Elementary	13800 Westerloch	Houston ISD	1,039	74
Walnut Bend Elementary	12909 Briar Forest	Houston ISD	800	56
Wolfe Elementary	502 Addicks-Howell Road	Katy ISD	409	61
The Village School	13077 Westella Dr	Private School	765	64
Yorkshire Academy	710 Bateswood Dr	Private School	175	15
Westside Montessori School	13555 Briar Forest Dr	Private School	150	13
Cardinal Newman School	1100 Eldridge Parkway	Private School	150	12
Stratford High	14555 Fern Dr	Spring Branch ISD	2,034	166
Thornwood Elementary	14400 Fern Dr	Spring Branch ISD	538	39
Nottingham Elementary	625 Nottingham Oaks Trl	Spring Branch ISD	530	42
Meadow Wood Elementary	14230 Memorial Dr	Spring Branch ISD	429	36
Coleman Coliseum	1050 Dairy Ashford St	Spring Branch ISD		10
		Totals	1,727	684

Other Uses and Employment

Mixed Uses – Five parcels in the study area are classified as mixed use in 2025 which include hotels, offices and retail. The following table illustrates the CDS Market Research assumptions regarding the development of each tract.

Project	Acres	Office, SF		Hotel Rooms		Retail, SF	
		2006	2025	2006	2025	2006	2025
Opus Tract Park 10 Barker Cypress	26.4		250,000				130,000
14000 Katy Freeway (Park 10)	16.3		125,000				50,000
Moody Park 10	12.9		175,000	0	228	0	7,000
NW Corner Eldridge Parkway at Enclave	10.5		0	130	130	50,000	68,000
Westlake Campus Redevelopment Project	40.5		700,000	0	150	0	150,000
Totals	106.6		1,250,000	130	608	50,000	405,000

Source: CDS Market Research

Other multi-use parcels in the corridor include multi-family and office uses and are included in the previous tables

Churches – 19 existing facilities on 80 total acres with estimated employment of 150. 2 additional churches are included in the 2025 land uses employing 20 persons.

Government – There are numerous parcels in the study area that are government owned. Government facilities which would likely have electrical demand in 2006 are: Water supply pumping stations, wastewater treatment plants and park facilities.

Post Offices – 2 – 315 Addicks Howell RD and 16830 Barker Springs RD employing 60.

Hospitals – One hospital is planned in the Energy Corridor Study Area, the Texas Children’s Hospital planned for the northwest corner of I-10 and Barker Cypress with a first phase 300,000 square foot facility

on 55 acres. Future expansion should double the building size and ultimate employment is estimated at 1,500.

Hotels

There are currently 18 hotels and motels in the area with a total of 2,558 rooms and employing an estimated 280 persons. Two hotels are included in Moody Park 10 with an estimated 228 rooms and 50 employees. Two additional hotels are included in the future projections in Westlake Park with an estimated 230 rooms and 40 employees.

Table 5 – Summary of Employment in the Energy Corridor

	2006	2025	Change	Change %
Office	57,511	81,533	24,022	42%
Retail	9,326	15,215	5,889	63%
Industrial	5,084	5,185	101	2%
Other	1,064	2,770	1,706	160%
Total	72,985	104,703	31,718	43%

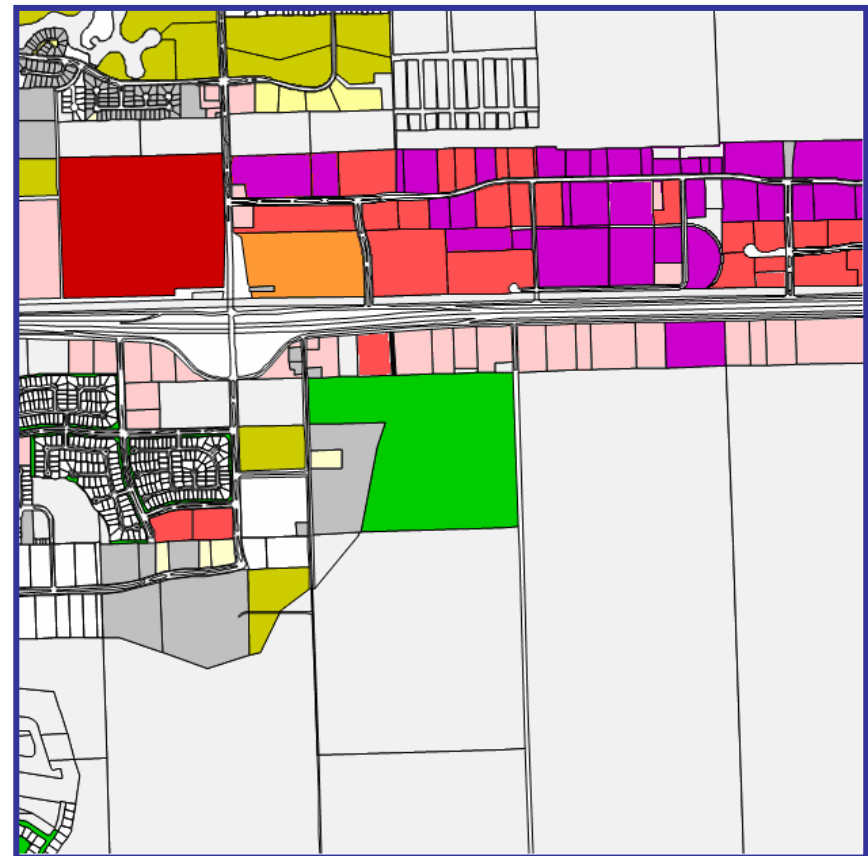
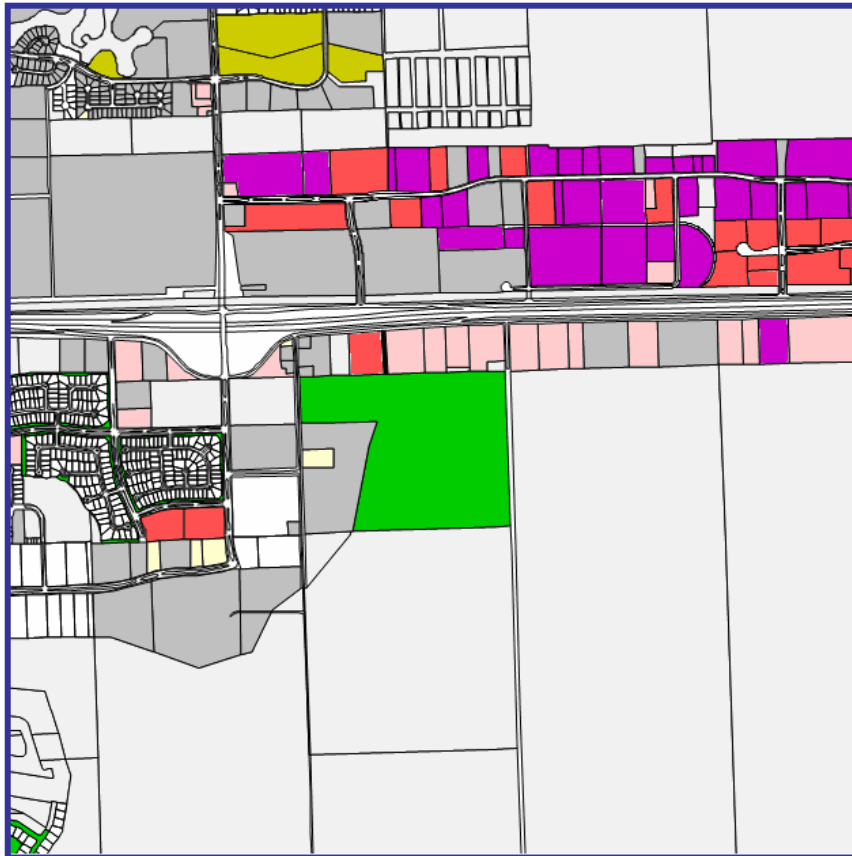
Source: CDS Market Research

The following pages illustrate the detailed land use determinations for 2006 and 2025 for the Energy Corridor Study Area. **Exhibit 4** illustrates the segmentation of the area into five segments: **Western, West Central, East Central, Eastern and Southern**. The following five exhibits show the land use by parcel.

Exhibit 5 – Western Zone Land Use

2006

2025



Land Use Color Coding			
	Single Family, Detached		Retail
	Single Family, Attached		Office
	Multifamily, Condo		Hotel/Motel
	Multifamily, Apartment		Mixed Use
			Ind., Flex
			Religious/Church
			School
			Vacant, Developable
			Vacant, Undevelopable
			Park

Exhibit 6 – West Central Zone Land Use

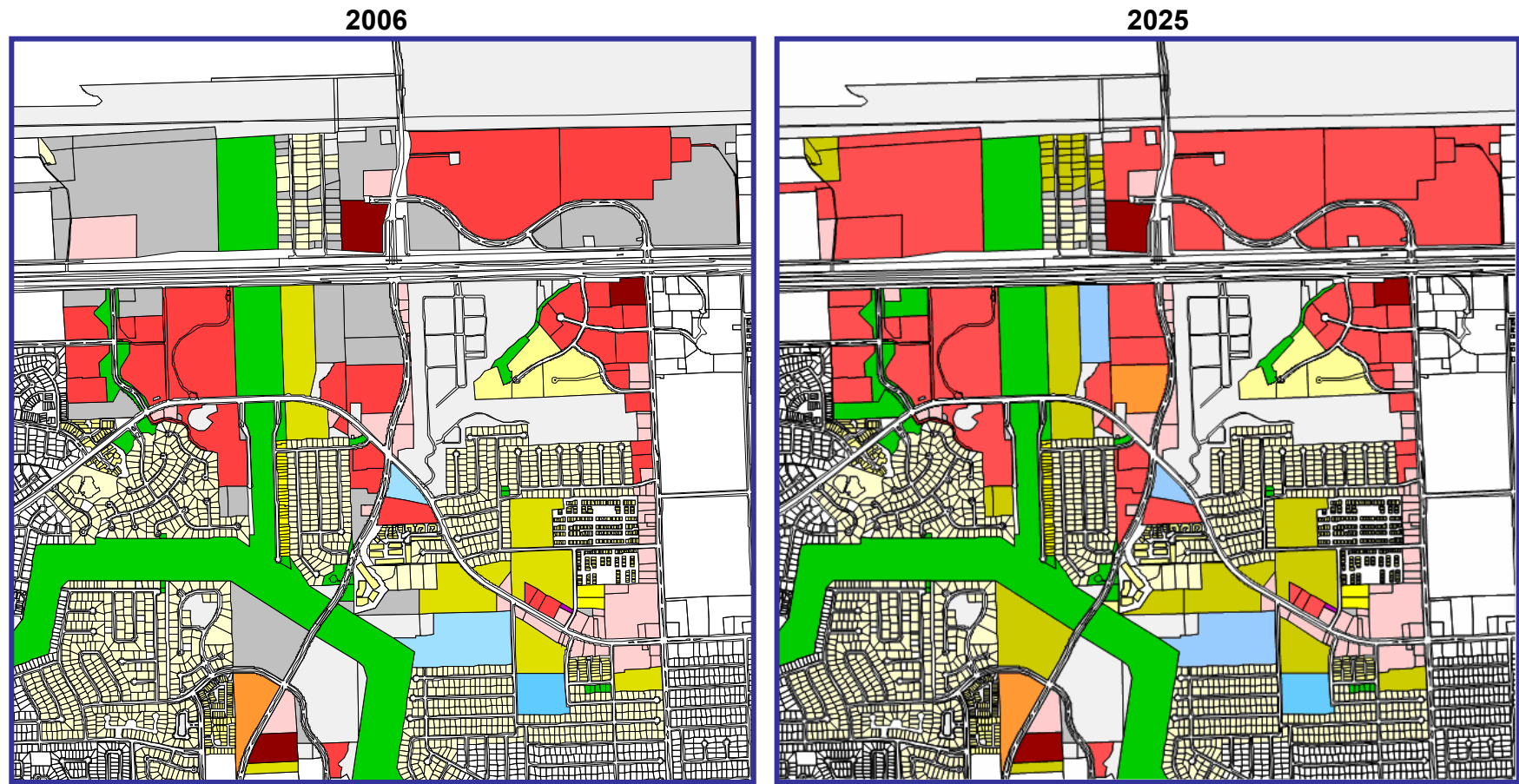
2006

2025



Land Use Color Coding			
	Single Family, Detached		Retail
	Single Family, Attached		Office
	Multifamily, Condo		Hotel/Motel
	Multifamily, Apartment		Mixed Use
	Ind., Flex		Religious/Church
	Park		School
	Vacant, Developable		Vacant, Undevelopable

Exhibit 7 – East Central Zone Land Use

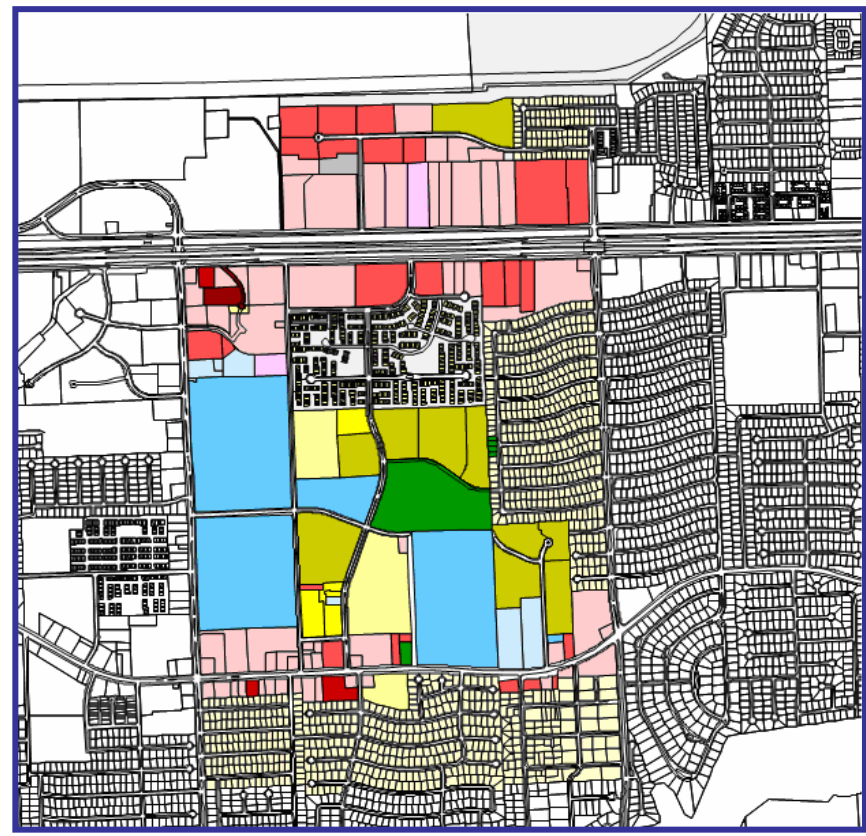
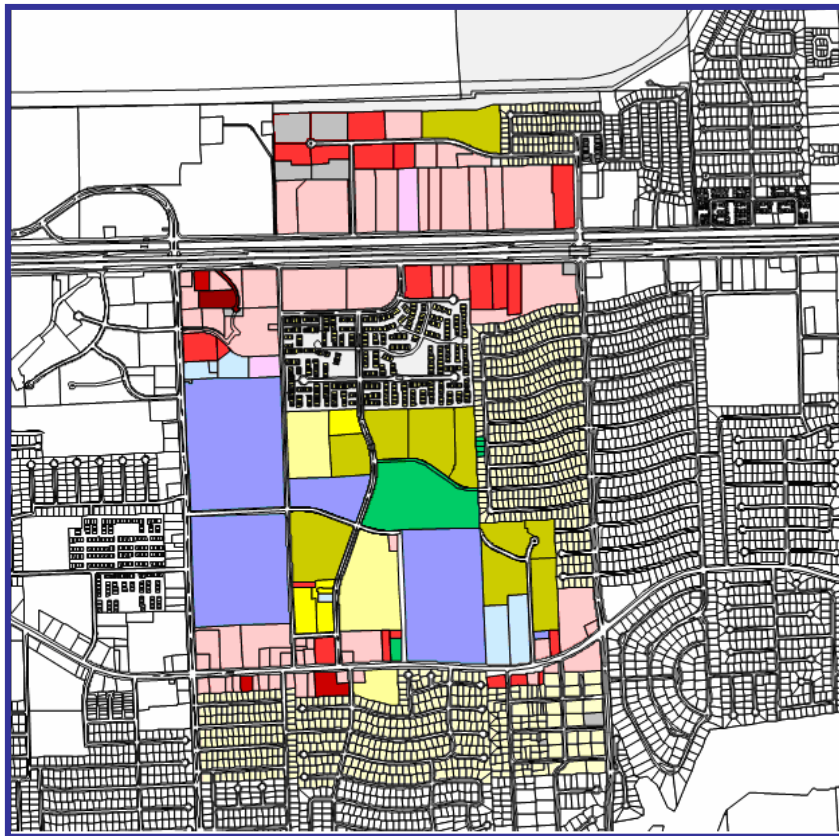


Land Use Color Coding			
	Single Family, Detached		Retail
	Single Family, Attached		Office
	Multifamily, Condo		Hotel/Motel
	Multifamily, Apartment		Mixed Use
	Ind., Flex		School
	Park		Religious/Church
	Vacant, Developable		Vacant, Undevelopable

Exhibit 8 – Eastern Zone Land Use

2006

2025

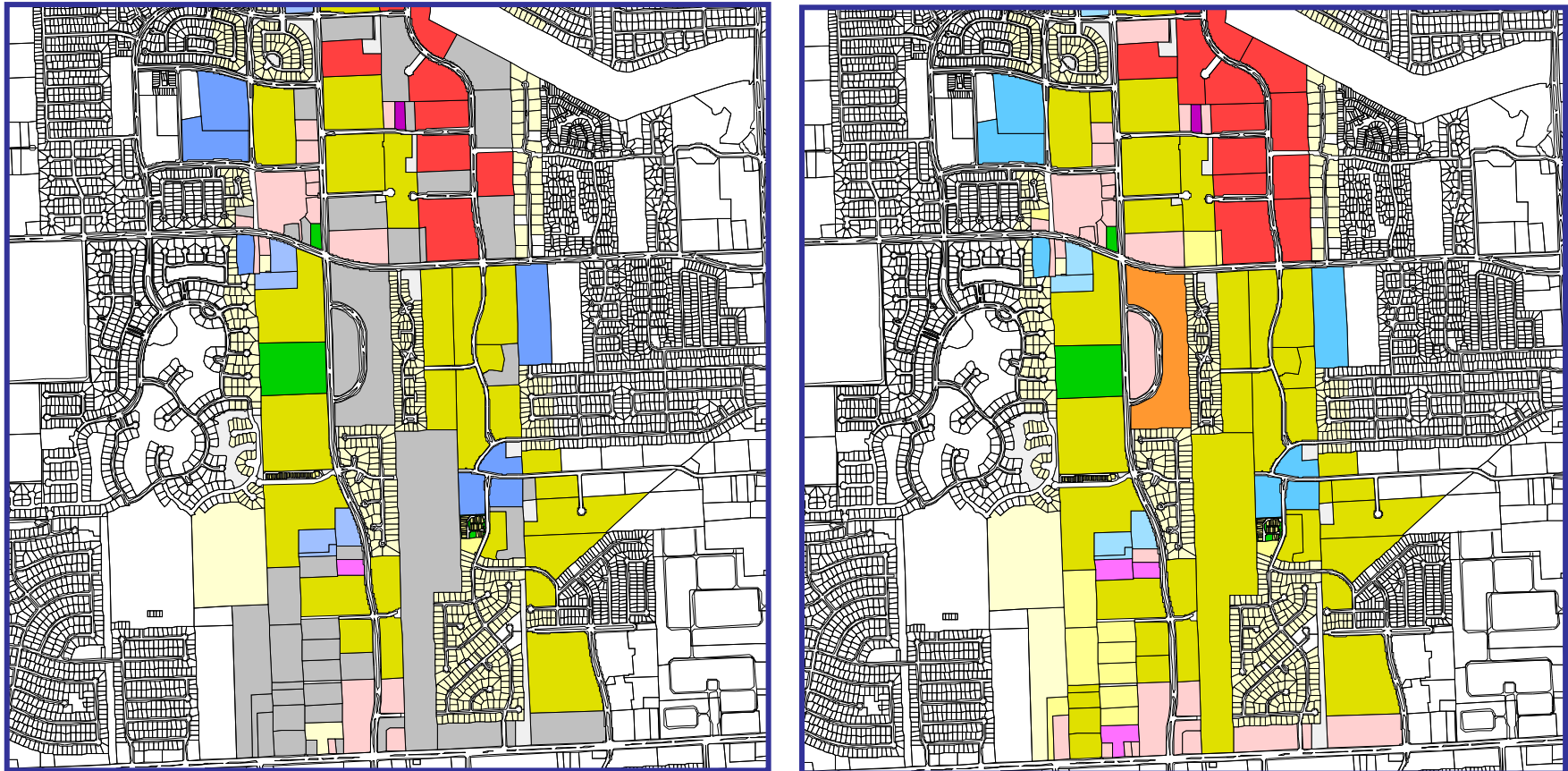


Land Use Color Coding			
	Single Family, Detached		Retail
	Single Family, Attached		Office
	Multifamily, Condo		Office, Medical
	Multifamily, Apartment		Hotel/Motel
	Ind., Self-Storage		Park
	Vacant, Developable		Religious/Church
	Vacant, Undevelopable		School

Exhibit 9 – Southern Zone Land Use

2006

2025

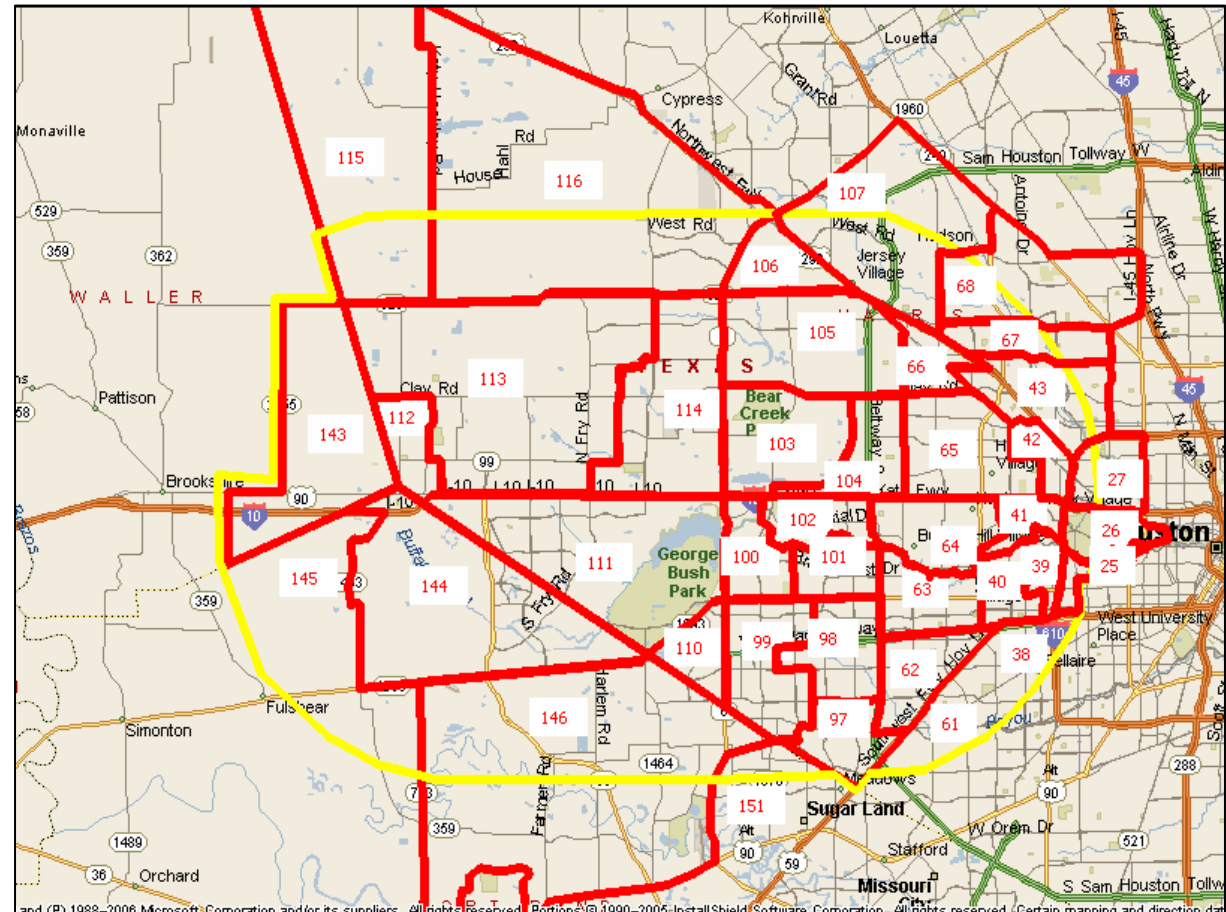


Land Use Color Coding		
Single Family, Detached	Office	Park
Single Family, Attached	Mixed Use	Religious/Church
Multifamily, Apartment	Ind., Self-Storage	School
Retail	Ind., Flex	Vacant, Undevelopable

2. Houston West Study Area Forecasts

The Houston-Galveston Area Council's *2035 Regional Growth Forecast* forms the basis of the Houston West Study Area Forecasts presented in this report. The H-GAC work is the most recent forecast of population and employment for transportation and other infrastructure planning in the region and was approved by the H-GAC Board of Directors on February 21, 2006. The forecast used by CDS Market Research in this work for the Energy Corridor District used the H-GAC data by Regional Analysis Zones.

The boundaries of the Houston West Study Area selected by the Energy Corridor District, encompasses all of 27 zones and parts of 13 zones. The map at the right illustrates the study area.



Houston West Study Area – Population and Housing

CDS Market Research estimates that there are 1,151,000 households in the larger study area and that number will grow to 1,421,000 by the year 2025. In making these estimates, it was necessary to estimate the study area by splitting 13 of the RAZ areas. This was accomplished by using aerial photographs to estimate the percentage of the various land uses in each of the zones, inside and outside of the study area. For 2025, the percentages were adjusted based on expectations of growth in the zones. The table below lists the estimated population and housing data by RAZ.

Table 6 – Estimated Population and Housing Units – Houston West Study Area

RAZ	Households		SF Split % ¹		Housing ² 2006		Housing ² 2025		Population	
	2006	2025	2006	2025	SF	MF	SF	MF	2006	2025
25*	1,743	2,060	36%	31%	681	1,318	665	1,545	3,178	4,198
26*	665	942	60%	41%	433	314	402	604	1,321	2,118
27*	2,108	3,542	70%	70%	1,601	747	2,582	1,155	5,115	8,964
38*	11,557	12,240	65%	65%	8,151	4,779	8,288	4,657	30,756	32,622
39	7,449	9,735	29%	21%	2,344	6,249	2,130	8,359	14,150	21,283
40	20,784	21,891	26%	24%	5,864	18,171	5,473	18,084	39,126	42,989
41	5,969	6,318	39%	37%	2,526	4,302	2,435	4,326	12,164	12,966
42	1,681	2,157	63%	55%	1,149	735	1,236	1,055	5,155	6,292
43*	7,188	7,806	51%	51%	3,978	4,161	4,147	4,157	19,955	21,300
61*	8,365	8,770	39%	39%	3,540	6,029	3,563	5,815	21,452	22,349
62	26,812	27,626	23%	23%	6,691	24,392	6,619	23,122	72,353	74,250
63	24,785	26,784	25%	25%	6,723	21,962	6,975	21,835	52,457	58,600
64	10,083	10,877	82%	82%	8,971	2,144	9,291	2,128	24,804	25,407
65	28,987	30,951	47%	50%	14,783	18,151	16,120	16,821	83,589	86,892
66	3,643	4,460	32%	30%	1,265	2,927	1,394	3,393	9,709	11,659
67*	5,727	6,455	31%	31%	1,926	4,668	2,084	4,841	15,419	16,693
68*	9,504	11,135	78%	70%	8,044	2,470	8,119	3,631	30,493	33,094
97	18,600	19,984	43%	39%	8,678	12,526	8,119	13,250	54,716	55,696

RAZ	Households		SF Split % ¹		Housing ² 2006		Housing ² 2025		Population	
	2006	2025	2006	2025	SF	MF	SF	MF	2006	2025
98	18,812	20,710	39%	35%	7,961	13,558	7,551	14,632	50,044	53,854
99	20,749	24,393	53%	51%	11,932	11,522	12,959	12,992	54,121	63,505
100	13,475	15,713	42%	37%	6,141	9,234	6,056	10,760	28,469	35,067
101	17,029	17,613	42%	40%	7,761	11,669	7,339	11,487	42,677	42,864
102	12,995	14,133	67%	61%	9,447	5,067	8,980	5,991	32,337	34,492
103	513	794	9%	6%	50	552	50	811	1,093	1,784
104	9,049	10,141	64%	58%	6,284	3,849	6,127	4,630	22,921	25,519
105	14,714	18,619	75%	75%	11,974	4,346	14,546	5,060	43,076	51,316
106	5,190	7,039	73%	69%	4,111	1,656	5,059	2,372	14,736	18,936
107	25,615	30,666	69%	68%	19,178	9,382	21,722	10,666	73,571	82,408
110	8,083	9,145	71%	64%	6,227	2,769	6,097	3,578	22,183	24,433
111	17,177	20,784	90%	87%	16,774	2,029	18,836	2,937	46,664	53,654
112	3,413	4,468	90%	88%	3,333	403	4,096	583	9,236	11,468
113	18,468	33,331	97%	90%	19,438	655	31,248	3,623	50,667	86,343
114	15,844	20,340	75%	70%	12,894	4,680	14,831	6,633	44,327	54,715
115*	203	2,604	100%	100%	220	-	2,712	-	644	6,397
116*	7,911	20,042	91%	92%	7,811	841	19,207	1,743	22,327	55,228
143	768	1,339	88%	85%	733	109	1,186	218	2,192	3,675
144	11,024	20,335	97%	95%	11,603	391	20,123	1,105	33,814	56,167
145*	1,367	8,294	100%	100%	1,483	-	8,640	-	3,641	21,447
146*	12,295	28,215	95%	88%	12,673	726	25,864	3,680	37,844	76,733
151*	6,210	8,014	80%	79%	5,390	1,467	6,595	1,829	18,621	23,480
Totals	436,554	550,465	55%	58%	270,766	220,950	339,466	244,108	1,151,117	1,420,857

Source: Houston-Galveston Area Council, *2035 Regional Growth Forecast*, January 2006

Notes: * means this is a split RAZ

¹ The percentage of units by housing type was derived from PCensus,

² Housing refers to housing units. The vacancy rate for single-family is 4.0%, vacancy rate for multi-family is 8.0%

Houston West Study Area – Employment and Commercial Buildings

This section presents the commercial buildings and employment summary for the entire Houston West Study Area. To prepare these estimates, the Houston-Galveston Area Council 2035 Forecast with employment separated into the land use classifications, educational, government, industrial, medical, office, and retail was utilized.

Table 7 – Estimated Employment and Buildings – Houston West Study Area

RAZ	Employment		Office Space, sf		Retail Space, sf		Institutional ¹ , sf		Industrial ² , sf	
	2006	2025	2006	2025	2006	2025	2006	2025	2006	2025
25*	12,422	23,374	2,226,153	3,956,425	998,400	1,728,000	467,610	3,604,000	655,265	1,097,350
26*	220	5,842	27,246	722,013	17,075	417,500	17,003	1,389,325	25,373	634,950
27*	23,468	47,241	2,764,884	5,759,738	1,653,750	2,975,000	1,179,113	8,822,575	5,249,175	8,471,950
38*	17,313	20,256	2,265,712	2,642,770	1,456,350	1,614,500	885,210	3,235,950	3,091,110	3,490,950
39	81,101	84,845	20,526,188	20,769,563	6,121,000	6,307,500	2,440,650	9,307,925	5,088,950	5,009,900
40	34,550	36,762	5,782,165	6,113,490	3,253,000	3,360,500	1,714,650	5,531,800	2,031,500	2,084,200
41	8,688	8,970	925,015	953,325	695,000	703,000	595,050	1,776,925	379,100	387,600
42	23,148	27,142	2,790,340	3,155,520	2,096,000	2,229,000	668,700	3,327,750	1,734,850	1,836,850
43*	19,217	28,544	2,271,868	3,269,140	1,462,800	2,033,500	853,320	4,483,750	1,266,160	1,696,600
61*	16,853	26,467	1,166,211	1,879,195	868,700	1,351,000	2,213,925	9,655,575	1,357,790	2,137,750
62	37,774	40,689	4,102,765	4,377,505	3,625,000	3,754,500	1,857,750	6,216,475	2,327,300	2,402,950
63	46,834	51,269	5,643,950	5,990,510	4,168,000	4,323,000	1,625,100	6,480,400	2,869,600	2,949,500
64	18,483	19,999	1,540,425	1,672,760	1,771,000	1,853,500	1,256,250	4,106,350	2,249,100	2,258,450
65	36,837	47,046	3,015,680	3,794,205	3,196,500	3,571,000	2,077,200	9,713,375	6,500,800	7,230,950
66	29,381	36,147	3,853,295	4,387,290	2,304,000	2,562,000	555,750	4,388,550	2,244,000	2,353,650
67*	12,107	23,001	1,416,916	2,623,615	1,378,975	2,305,500	220,740	2,257,175	982,345	1,637,100
68*	3,733	21,134	290,552	1,698,505	291,060	1,381,500	266,910	5,421,725	622,370	2,595,050
97	16,557	21,137	1,479,815	1,863,425	1,569,000	1,811,500	744,750	3,549,175	2,675,800	3,001,350
98	27,536	32,057	3,357,965	3,763,805	2,073,000	2,262,000	1,129,350	4,796,125	1,659,200	1,768,850

RAZ	Employment		Office Space, sf		Retail Space, sf		Institutional ¹ , sf		Industrial ² , sf	
	2006	2025	2006	2025	2006	2025	2006	2025	2006	2025
99	11,422	15,068	924,445	1,231,105	1,089,000	1,244,500	935,250	3,851,775	1,071,850	1,332,800
100 ³	28,087	39,895	7,146,003	9,870,152	1,395,500	1,571,000	586,650	3,189,625	854,250	946,900
101	15,612	19,588	1,540,235	1,840,625	1,596,500	1,725,500	520,350	3,182,825	2,191,300	2,299,250
102	25,584	29,233	3,175,448	3,522,778	2,123,500	2,294,500	1,816,950	6,283,200	1,279,250	1,369,350
103	1,564	1,825	306,890	1,676,890	163,604	221,420	45,750	241,400	88,400	93,500
104	30,291	34,104	3,623,965	3,966,535	2,899,500	3,044,500	887,550	3,893,425	2,091,000	2,174,300
105	33,981	40,858	2,752,435	3,329,180	2,261,000	2,542,000	723,750	4,563,650	10,676,000	10,950,550
106	11,674	14,982	874,760	1,174,295	982,000	1,157,000	262,200	1,430,125	3,597,200	4,084,250
107	32,511	43,651	2,543,910	3,468,640	2,611,000	3,088,500	1,737,300	9,024,450	6,892,650	7,310,850
110	3,609	5,868	288,515	458,470	441,000	519,500	220,050	1,524,900	403,750	528,700
111	15,014	19,501	1,232,815	1,579,945	1,574,500	2,221,500	953,850	4,343,925	1,867,450	2,210,850
112	4,149	6,027	319,010	492,385	250,000	344,500	252,600	1,238,875	958,800	1,095,650
113	9,467	15,977	770,260	1,285,445	885,000	1,142,500	599,100	3,967,375	1,399,100	1,920,150
114	22,869	26,818	2,851,710	3,620,000	1,896,000	2,296,000	681,000	3,723,850	1,528,300	1,589,500
115*	194	1,790	14,668	114,475	13,200	66,000	3,000	609,025	68,000	288,150
116*	4,225	11,670	331,693	928,435	236,000	613,000	294,525	2,742,525	871,675	1,981,350
143	1,391	1,799	94,335	121,790	155,500	183,000	67,650	320,450	304,300	352,750
144	6,561	14,209	575,320	1,208,305	460,000	947,500	567,900	3,647,775	612,000	1,413,550
145*	1,672	5,426	156,076	464,170	94,500	358,000	91,665	1,090,550	302,260	836,400
146*	2,855	14,261	263,939	1,220,275	196,425	973,000	197,100	3,317,125	353,813	1,691,500
151*	3,914	37,639	331,156	3,202,355	331,050	3,017,500	191,768	6,394,975	739,118	6,142,100
Totals	732,865	1,002,111	95,564,729	124,169,048	60,653,389	76,114,920	32,404,988	166,646,750	81,160,253	103,658,350

Notes: * means this is a split RAZ

¹ Institutional includes schools, hospitals, and government building space in square feet.

² Industrial includes light industrial, office/warehouse and service centers.

³ The only RAZ with a discrepancy between the detailed analysis of Section 1 and the H-GAC forecasts was zone 100. CDS Market Research estimated 28,087 employees in 2006 while H-GAC estimated 15,371. By 2025, CDS estimated 39,895 and H-GAC forecast a total of 19,523. For the table above, we have used the CDS Market Research estimates and forecasts for that zone.

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