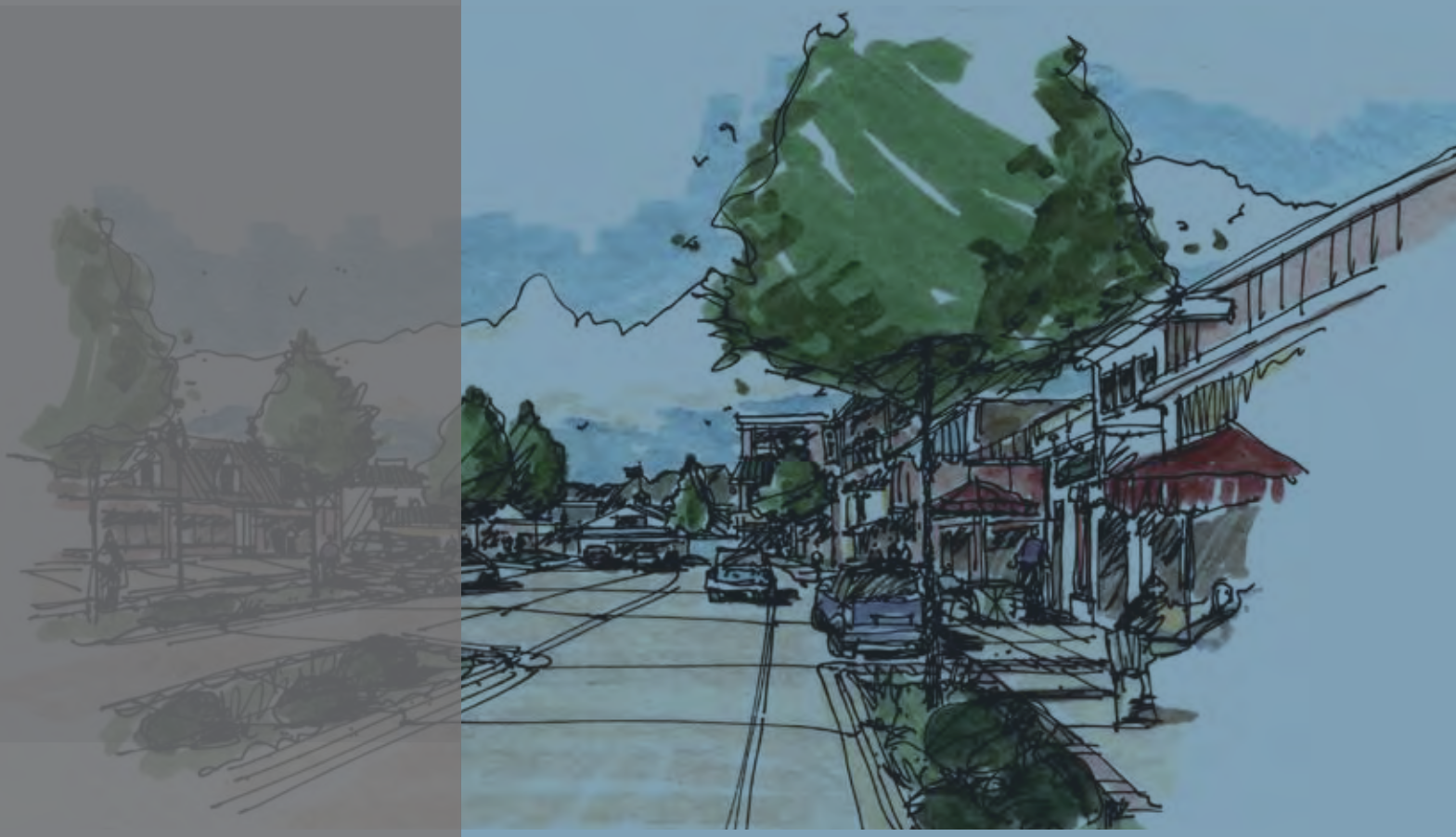
GREATER UPPER MARLBORO

REVITALIZATION AND DEVELOPMENT STRATEGY



The Maryland-National Capital Park and Planning Commission

Prince George's County Planning Department
www.pgplanning.org

Abstract

TITLE:	Greater Upper Marlboro Revitalization and Redevelopment Strategy
AUTHOR:	The Maryland-National Capital Park and Planning Commission
SUBJECT:	Revitalization and redevelopment strategy for an older, mixed commercial and industrial area located northwest of the intersection of US 301 and MD 4 and to the east of the Town of Upper Marlboro.
DATE:	May 2012
SOURCE OF COPIES:	The Maryland-National Capital Park and Planning Commission 14741 Governor Oden Bowie Drive, Upper Marlboro, Maryland 20772
ABSTRACT:	The Greater Upper Marlboro Revitalization and Redevelopment Strategy comprises text, maps, illustrations, and photographs. Developed with public participation by community business and property owners, this document presents background information and recommends goals, strategies, and actions pertaining to land use, environment, recreation, and public facilities.

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1.0 INTRODUCTION

1.1 Project Overview

Background

This Greater Upper Marlboro Revitalization and Development Strategy study provides a revitalization and development strategy for the Greater Upper Marlboro study area, strategically located northwest of the intersection of US 301/Crain Highway and MD 4/Pennsylvania Avenue (see Map 1.1 on page 4). Located approximately seven miles from the Capital Beltway and east of the Town of Upper Marlboro, the county seat, the study area represents a unique opportunity for new development and redevelopment. During the preparation of the 2009 *Approved Subregion 6 Master Plan and Sectional Map Amendment* (SMA), there was much developer interest for commercial development sites in this vicinity. However, due to the difficulties with redeveloping older properties, the focus was on nearby green field sites, primarily in the Rural Tier to the east of US 301, rather than on previously developed properties. The Subregion 6 Master Plan reinforced the county's policy to preserve the rural lands to the east of US 301 but recommended new mixed-use development to the west. The Subregion 6 Master Plan promoted the change in land uses in light of the planned changes in the roadwork network, new mixed-use zoning to the north, and changing market conditions. Long-range transportation network changes may include realignment and upgrading of both US 301 and MD 202/Largo Road, which would greatly impact the existing uses while at the same time open up opportunities for new development and an improved gateway into the Town of Upper Marlboro.

Existing development in the area is fragmented, and much of the land is underutilized with a blend of older miscellaneous commercial and industrial uses that have developed over the last 40 years. The industrial uses concentrated along the railroad tracks south of MD 725 currently employ a significant number of employees. A large part of this area, however, is in the 100-year floodplain, complicating the redevelopment potential. At the same time, hidden behind much of the industrial development are attractive environmental assets, including two large ponds and the Western and Collington Branches of the Patuxent River Branch; these assets could provide significant amenities to the community and focal points for new development.

Previous Studies

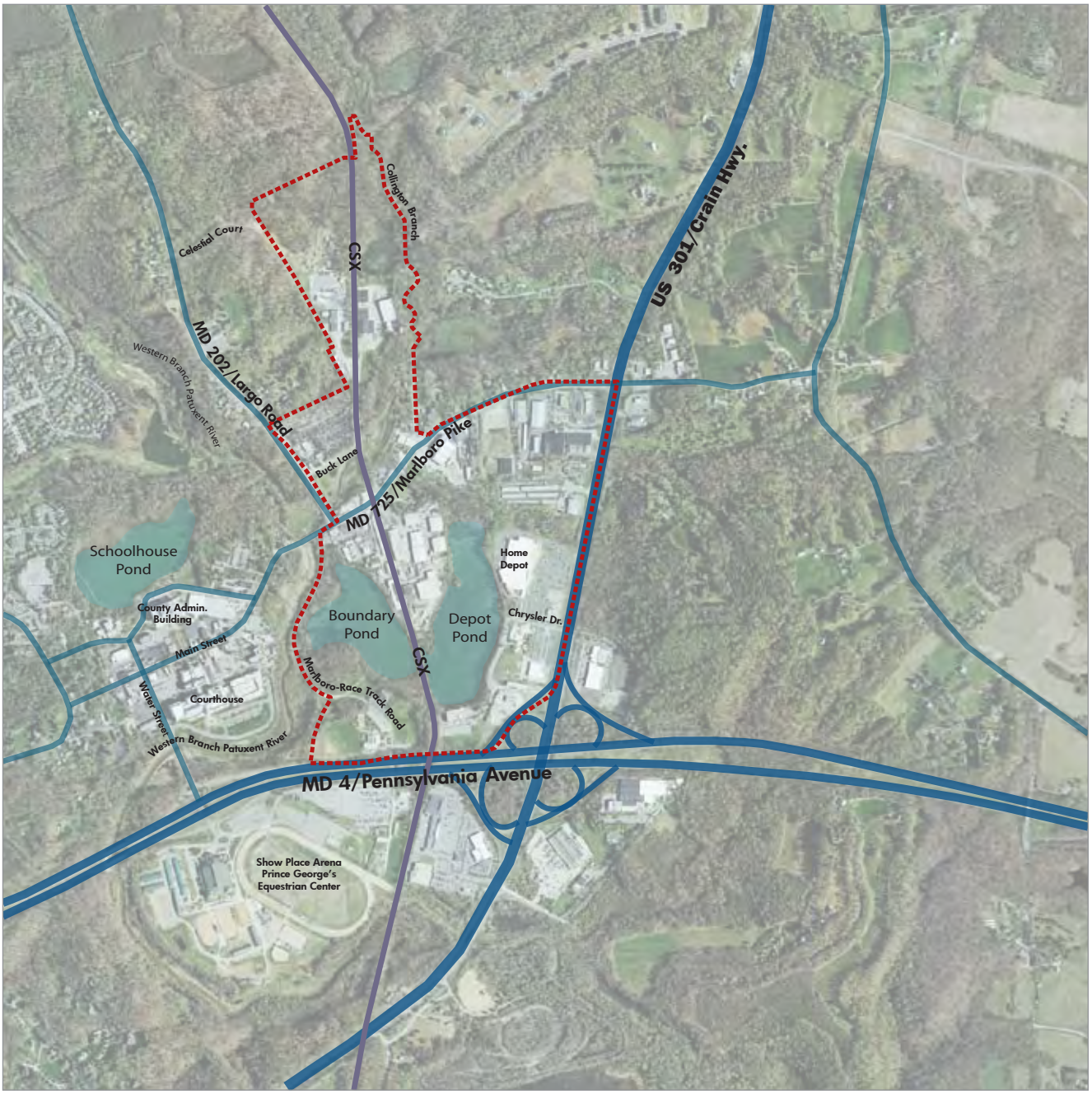
Preceding this study, the 2009 *Town of Upper Marlboro Revitalization Action Plan* examined changing markets and community needs and developed revitalization strategies that reflected a common vision for the town core. It sought to reestablish the downtown in terms of function, activities, and prominence. The Upper Marlboro Action Plan developed an implementation program that defined and prioritized major tasks, identified responsible parties, proposed a time frame for startup and/or completion of action items, and estimated associated costs and potential funding mechanisms or sources. The recommendations for implementation are outlined in the Subregion 6 Master Plan. The Upper Marlboro Action Plan does not include the current study area. However, it helped inform the revitalization and development strategies of this current study.

Goals and Objectives

The goals and objectives of this study are to:

- Propose a land use pattern that supports the vision and policies of the area as established in the Subregion 6 Master Plan.
- Create a conceptual development plan for Greater Upper Marlboro that depicts new and retained development, creates an improved circulation network that promotes connectivity, preserves and enhances the area's natural amenities, and maximizes the area's economic potential.

Map 1.1 Greater Upper Marlboro Context Plan



KEY

- Roadways
- CSX Rail Line
- Study Area Boundary

- Recommend revitalization/economic development strategies to create an attractive gateway to the Town of Upper Marlboro.
- Prioritize redevelopment efforts and needed improvements for the area.

1.2 Components

The revitalization and development strategy comprises the following components: Introduction, Study Area Analysis, Market Strategy, Revitalization and Development Strategy, Implementation, and Appendix (including the Market Analysis), and Acknowledgments.

1.3 Study Area

The Greater Upper Marlboro study area boundary is defined by major vehicular thoroughfares, local roadways, and environmental features (see Map 1.1 on page 4). The major vehicular thoroughfares of US 301/Crain Highway and MD 4/Pennsylvania Avenue form the eastern and southern boundaries of the study area. MD 202/Largo Road, Marlboro Race Track Road, and the Western Branch of the Patuxent River form the western boundary. MD 725/Marlboro Pike and the Collington Branch forms the north-eastern boundary of the study area. Additionally, a CSX rail line travels north-south, bisecting the study area (see Photo 1.4).

Community residents and business owners, as well as visitors, use MD 725/Marlboro Pike to connect between US 301/Crain Highway and the town core of Upper Marlboro. As the gateway road in to town, Marlboro Pike is the primary focus of this study (see Photo 1.1).

Major environmental features include Boundary Pond and Depot Pond, significant areas of wooded wetlands, and floodplain (see Photo 1.2).

Currently, the study area is dominated by commercial and industrial uses, with the development designations of Rural Tier east of US 301 and Developing Tier to the west. Within the study area there are a small number of residential properties that front Marlboro Pike, between the CSX rail line and US 301. The majority of buildings are single-story, with varying setbacks and individual driveway access off of Marlboro Pike (see Photo 1.3).

Photo 1.1 MD 725/Marlboro Pike at MD 202/Largo Rd

Photo 1.2 Depot Pond Wetland

Photo 1.3 Commercial Business along MD 725

Photo 1.4 CSX rail line crossing MD 725

1.4 Public Process

Overview

An objective of this revitalization study is to work with local businesses and other county and state agencies to develop recommendations and identify necessary infrastructure, policy, and new compatible infill development that will enhance and strengthen existing businesses. The public process included stakeholder interviews and business community meetings. As a result of this process, the Upper Marlboro Business Association (UMBA) was established with The Maryland-National Capital Park and Planning Commission (M-NCPPC) initially facilitating meetings.

Business Community Meetings

The first business community meeting was held on March 03, 2011, at the Marlboro Moose Lodge. Commercial property and business owners were introduced to the Greater Upper Marlboro Revitalization and Development Strategy study. Discussions focused on site constraints and opportunities, market analysis, strategic recommendations, and road scenarios. Additionally, the meeting allowed business owners to discuss any current or potential plans for their properties and businesses.

The second business community meeting was held on November 15, 2011, at the Marlboro Moose Lodge. Commercial property and business owners were given an opportunity to review and provide feedback on the proposed conceptual development scenarios for the study area. Additionally, the meeting allowed owners to discuss any new or updated plans for their properties and businesses since the first Business Community Meeting and the storm events and flooding that occurred in September 2011.

Issues and Concerns

In the business community meetings, attendees discussed a number of issues and concerns relating to the study area and potential revitalization and development opportunities. Comments included:

- The study area is fragmented by natural features.
- Tributaries, ponds, and wetlands within the study area serve as physical barriers that could be obstacles for redevelopment.
- Current development within the study area is characterized by older commercial and industrial uses and need revitalization.
- Much of the study area is located within flood-prone areas, which will limit development opportunities.
- Redevelopment will likely require government support and could be expensive.
- Long-range transportation network changes will greatly impact the existing uses but may open up opportunities for new development.
- Multiple businesses on the peninsula between Boundary and Depot Ponds have access through one shared entrance due to physical and environmental barriers.
- The CSX Railroad is a major barrier bisecting the study area and separating businesses.
- The proposed future realignment of MD 202/Largo Road (see Map 2.7 on page 22) would limit vehicular circulation and create a barrier to existing businesses along MD 725/Marlboro Pike.
- Once US 301/Crain Highway is realigned and updated to a freeway, the existing US 301 will become a service road, dramatically changing the access to and character of this entrance to Upper Marlboro.

2.0 STUDY AREA ANALYSIS

2.1 Environmental Constraints

The study area has extensive environmentally sensitive resources and has been developed, over many years, with a patchwork of commercial and light industrial uses. Proximity of development to these environmentally sensitive areas creates both constraints and opportunities for future development and revitalization efforts. The findings within this report result from a standardized analysis involving existing site information, field observations, and additional overlay constraints documented through research.

Findings and Comparison

Initial investigation began in 2010 with a review of available site data. This included existing aerial imagery readily available from the Bing search engine, Federal Emergency Management Administration (FEMA) Flood Insurance Rate Map (FIRM), approved county watershed studies, Georgraphic Information System (GIS) mapping data provided by Prince George's County, and the Maryland Department of Natural Resources (DNR) wetland maps. DNR wetland maps were cross-referenced with existing aerial imagery to document variability between previously identified wetlands and existing study area conditions. Review of on-site features was performed with the M-NCPPC project committee. A more in-depth field review followed, focusing on areas of interest or question. This second visit attempted to make a full review of delineation boundaries; however, fencing and permission to access sites inhibited investigation of some areas.

Field observations were digitized and added to existing GIS information provided by Prince George's County. Adjustments to streams, ponds, and wetlands further emphasized the existing environmental constraints that will dictate future planning efforts. Delineations made in the field are an initial review, subject to survey and jurisdictional approval during future investigations.

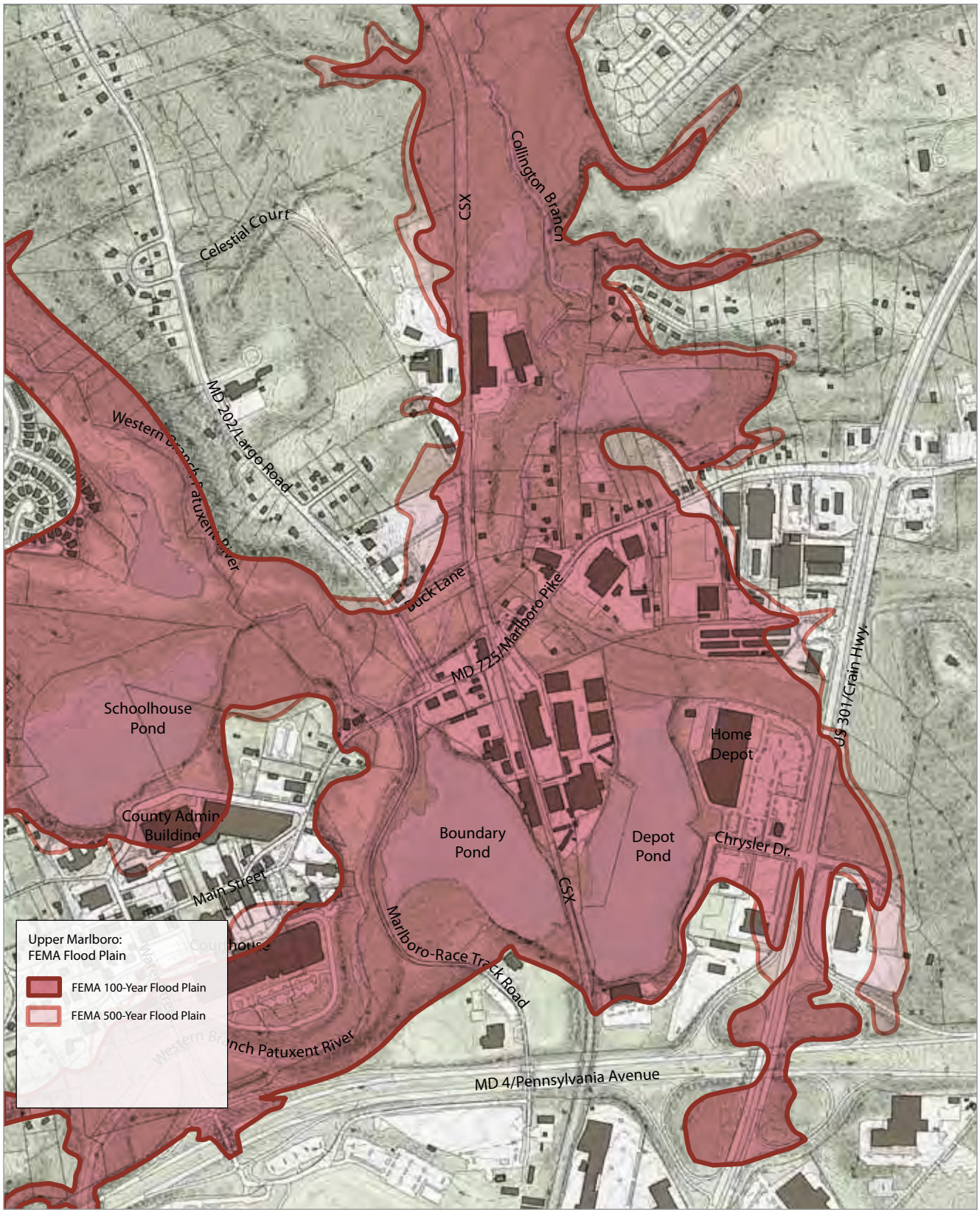
Review of current legislation provided another layer of constraints. This review was necessary to understand prior land use obligations within the study area. Council Bill CB-26-2010 identified buffers associated with streams and wetlands, reflecting the County's green infrastructure guidelines (see the 2005 *Approved Countywide Green Infrastructure Plan*). This legislation provides parameters

Photo 2.1 Water Street—High Water after Flooding

Photo 2.2 MD 725/Marlboro Pike after Flooding

Photo 2.3 US 301/Crain Hwy.—High Water after Flooding

Map 2.1 Upper Marlboro FEMA Flood Plain Map



for environmental buffers within the county's development tiers. Prince George's County has updated the Greater Upper Marlboro area included in this study from the Rural Tier to the Developing Tier. A minimum of 75 feet must be preserved or restored along regulated streams within the Developing Tier, measured from the top of bank. Wetland buffers are required at a minimum of 25 feet from the edge of wetlands. Expansion of this buffer to 100 feet is required when slopes of 15 percent or greater are present. Additionally, the study area is located within the county primary management area (PMA). All associated PMA buffers parallel the environmental buffers mentioned above, including those identified through field observations. (see Map 2.2 on page 12)

Concurrent with the review of legislation pertaining to site constraints, a FEMA Flood Insurance Rate Map (FIRM), revised September 6, 1996, was integrated into the site investigation in order to identify development potential (see Map 2.1 on page 10). Based on the FIRM, a large portion of the study area has limited development potential due to its location within the 100-year floodplain. The 100-year floodplain is defined as having a one percent or greater chance of flooding in any particular year. Development within the floodplain poses hazards to life and property and does not qualify for lower cost flood insurance.

New development within these areas is subject to the Prince George's County Floodplain Ordinance, 1989 (amended 1993, 2011), requiring new structures to have a finished first-floor elevation (FFE) of at least one foot above the regulated 100-year flood elevation. New structures also must receive a waiver from the Department of Public Works & Transportation (DPW&T). Additionally, there must be a safe means of ingress to and egress from any habitable area during a 100-year storm, generally interpreted to be a roadway that is no more than six inches lower than the flood elevation. An area of compensatory storage equivalent to volume filled must be created when development occurs within a floodplain. Additionally, existing hydraulics cannot be altered by development in a manner that would cause a significant change in the 100-year flood elevation.

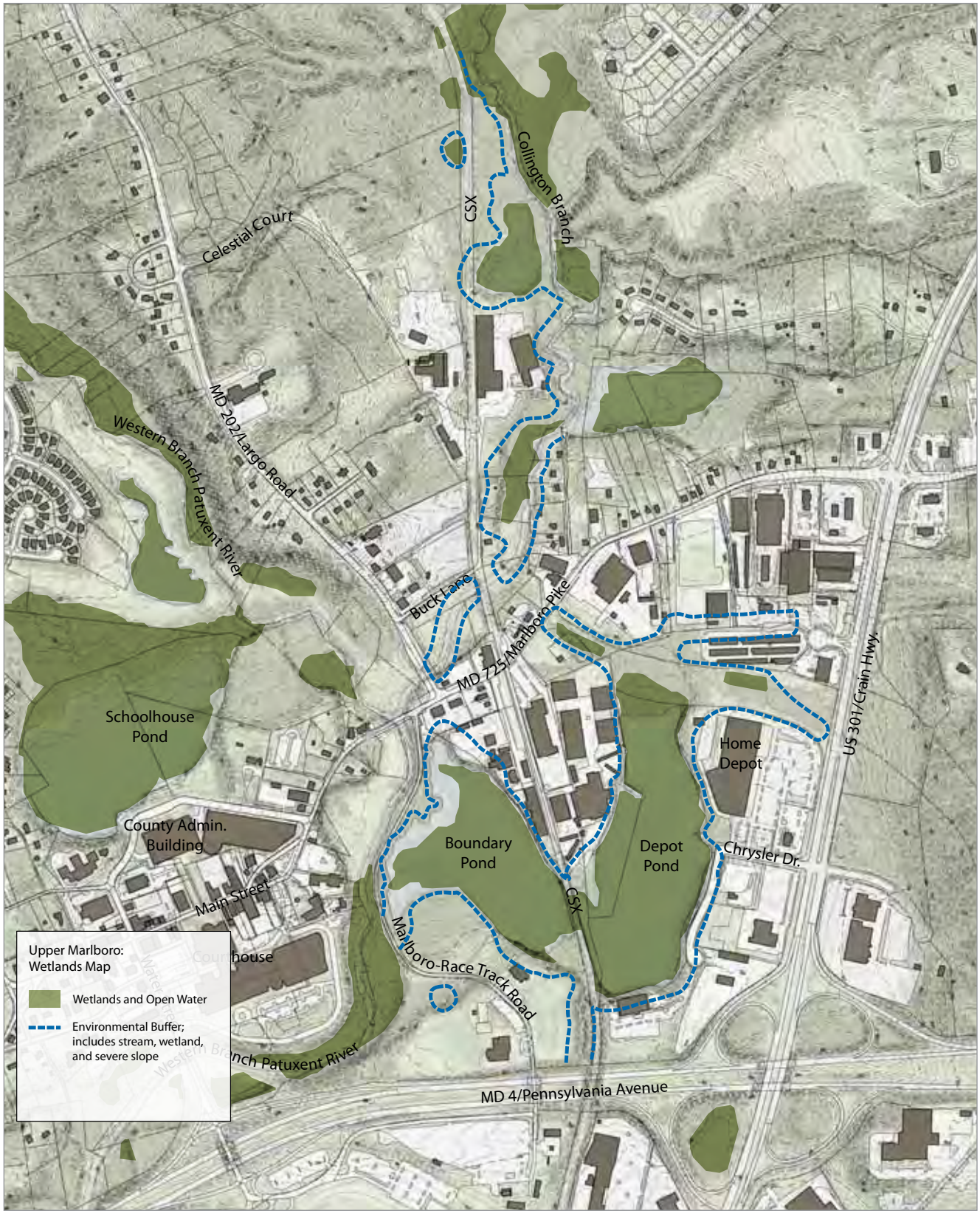
The Prince George's County Department of Environmental Resources (DER) has performed detailed floodplain modeling for both the Western Branch and Collington Branch within the vicinity of this study. Evaluation of DER's

Photo 2.4 Schoolhouse Pond Wetland

Photo 2.5 Stream

Photo 2.6 Boundary Pond—Wooded Wetland

Map 2.2 Upper Marlboro Wetlands and Open Water Map
(Environmental features are subject to delineation at the time of development review)



maps and HEC-2 data used to model the stream channel and flood events provided additional information about the 2-year, 10-year, and 100-year storms. The model shows a narrow 'channel' within the much wider floodplain that is effectively conveying the flow of water from a 100-year storm through the study area. (See Map 2.3 on page 14.) The current within this channel is more likely to cause damage and create hazards to life, limiting potential development.

During a 100-year storm, portions of the floodplain that lie outside of this channel are somewhat like a lake, with less damaging currents. These areas offer a wider range of development opportunities. Some uses and amenities can tolerate temporary flooding if they are not exposed to powerful currents. Parking lots are another acceptable use. Other uses, including habitable structures, may be possible with site modifications and appropriate building designs, subject to the Prince George's County Floodplain Ordinance requirements.

As demonstrated during the September 2011 floods caused by Hurricane Irene and Tropical Storm Lee, when people required evacuation and much of the study area sustained property losses, there is an existing public safety need to raise portions of Old Marlboro Pike to either side of the railroad crossing to provide roadway access to areas that are currently cut off during large floods. With this improvement, it may be possible to enlarge and fill adjacent, suitable sites to an elevation above the 100-year storm without significantly changing the pre- and post-development hydraulics and requiring compensatory storage. An engineering study and floodplain model, approved by the Maryland Department of the Environment (MDE) and US Army Corps of Engineers (USACE), would be required in order to show that the proposed fill without compensatory storage would have no significant impact on the 100-year flood elevations. Such a study and infrastructure improvements may increase incentives for development within the study area. A "compensatory storage bank" is another potential means to assist development. Whether tied to redevelopment or part of streetscape improvements to MD 725/ Marlboro Pike, addressing life safety ingress/egress along the roadway should be a priority.

Conclusions

Conclusions drawn from the assemblage of data highlight the sensitivity of this area to development. Planning must take into consideration the vulnerability of this area to flooding. The presence of two large ponds within the study area, the Collington and Western Branches of the Patuxent River, and patches of wetlands provide another overlay of site constraints. However, these constraints also offer opportunities for future planning endeavors, taking into account Maryland Smart Growth practices. Smart Growth planning strategies encourage development growth in areas with existing or planned infrastructure in order to protect the state's valuable natural resources. Here, in the case of the Upper Marlboro study area, is a confluence of natural areas and existing built infrastructure where thoughtful, future development and enhanced environmental areas can benefit one another.

Future planning efforts should aim to balance the built and environmental needs, consolidating new development within the study area where a safe means of ingress/egress can be provided and where the potential for flooding is minimal. (See Map 2.4 on page 16.) Existing infrastructure should be evaluated for quality, safety, and relevance to revitalization efforts. This analysis may result in shifting development out of environmentally sensitive areas in order to preserve, enhance, and upgrade identified natural features. The evaluation of environmental constraints performed during this study serves as a framework for future efforts, reflecting county and statewide practices to benefit local development and revitalization within Greater Upper Marlboro. A future study by USACE, known as CTS 9698, is planned for the area by 2015 and will help determine appropriate actions.

Map 2.3 Upper Marlboro —Flood Channel

2.2 Environmental Assets and Opportunities

Environmental Study Area Opportunities

The environmentally sensitive areas in Upper Marlboro present a challenge to conventional forms of development while offering many opportunities to highlight aesthetics and ecological value. These opportunities include:

- The study area is a potential hub for regional recreation and could become a significant element of Prince George's County's green infrastructure network, connecting the Western Branch to the Patuxent River Park.
- The environmental areas contain large viewsheds that can provide great natural beauty and interest, drawing visitors to this location as a destination and creating environmental learning opportunities.
- The wetlands and floodplain areas provide free ecosystem services, enhance environmental quality (water and air), and provide wildlife habitat.
- The open space can potentially accommodate large, public gatherings and a variety of different users.

Specific opportunities include:

- The northern portion of the study area has limited development potential. However, the high ground between Buck Lane and Collington Branch (see Location 1 on Map 2.4 on page 16) could be used by an outfitter or for other recreational, educational, and environmental activities (see Photos 2.7 and 2.8). There are abundant natural resources on both sides of Collington Branch within the study area and extending well beyond within the stream valley to the north. These include a large number of wetlands interlaced with the Collington Branch main channel, tributaries, and wooded lowlands that provide diverse habitats for wildlife. This area could provide easy access for residents and visitors to experience and observe the natural environment in a relatively undisturbed setting.
- Boardwalks and pedestrian circulation within environmental areas can increase public access and provide learning opportunities. These facilities are

Photo 2.7: Overlook Precedent

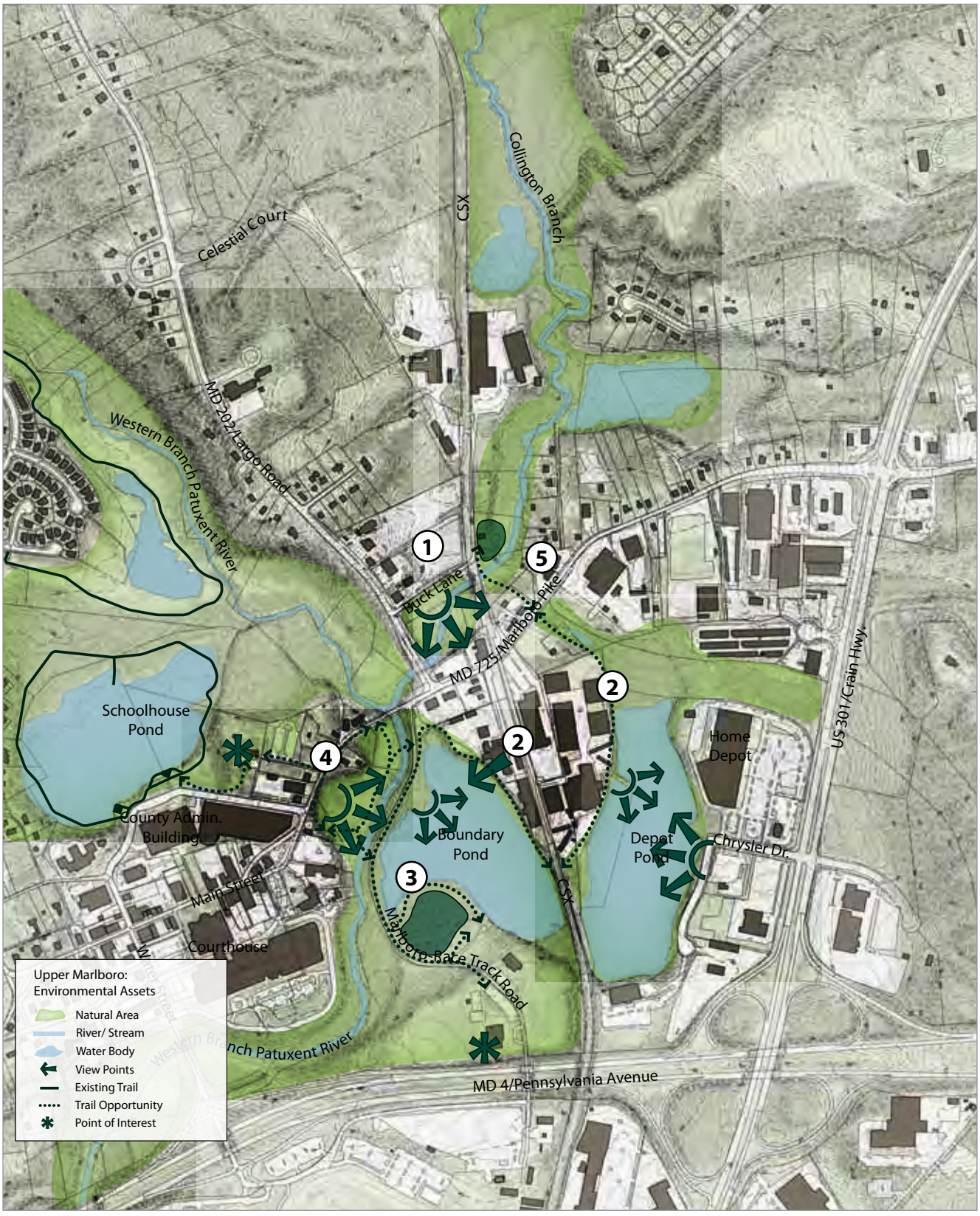
Photo 2.8: Supplemental Vegetated Edge

Photo 2.9: Trail and Outdoor Pavilion

Photo 2.10: Mill Race Park - Columbus, Indiana Precedent

See Map 2.5 on page 18 for study area locations.

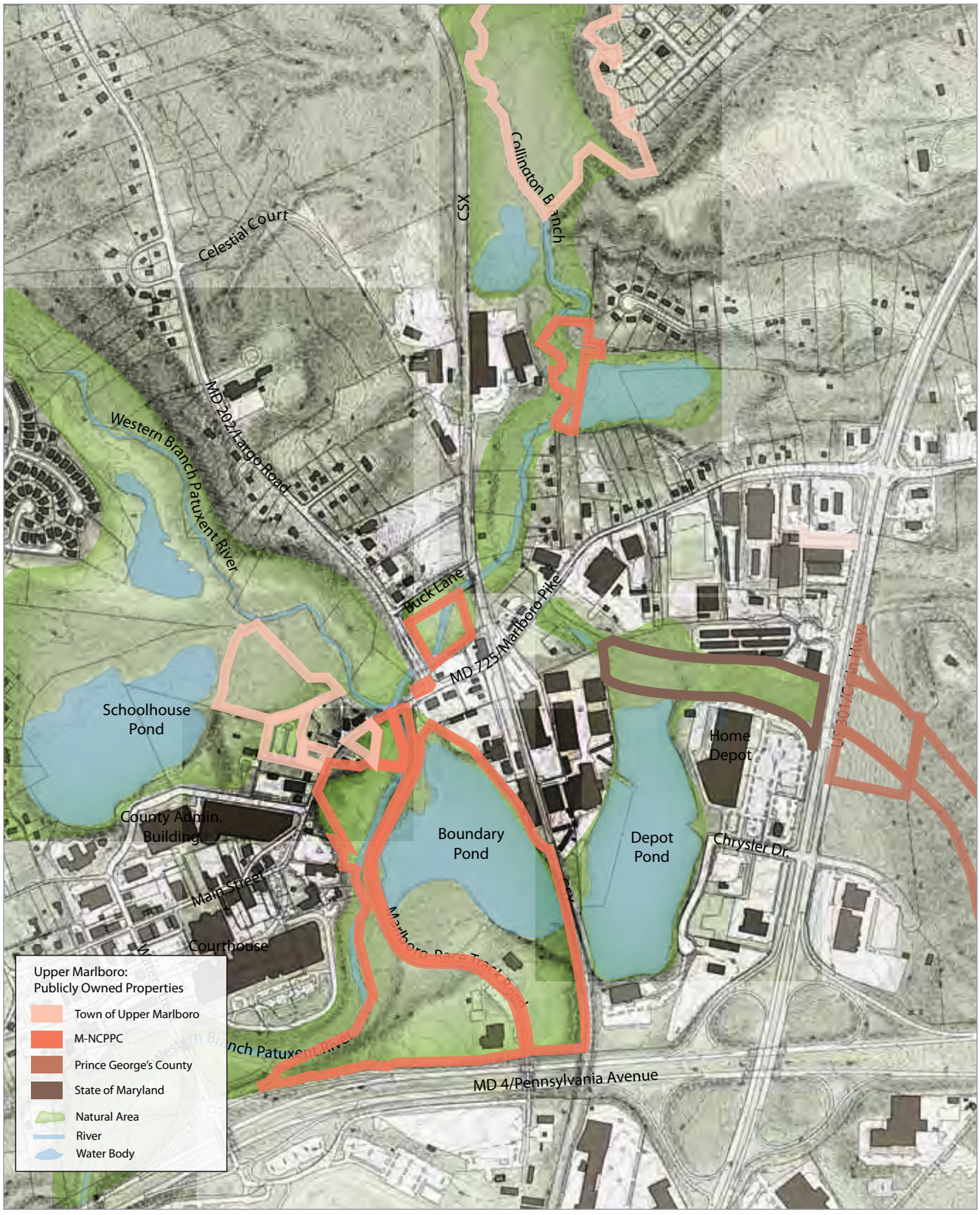
Map 2.4 Upper Marlboro—Potential Locations for Recreational, Educational, and Environmental Activities



a use that is likely to be allowed by MDE and the USACE. Many of these areas are already owned by the county, M-NCPPC, or the state. (See Map 2.5 on page 18.) With appropriate construction techniques, a boardwalk is often treated as a minor or even "temporary" impact with no long-term impact on the wetlands. Nevertheless, designs for these improvements would need to use a balanced approach, one that is coordinated closely with stakeholders and Prince George's County agencies. Proposed routes (see Trail Opportunity locations on Map 2.4, page 16) would require careful consideration of issues such as potential users, benefits to the public, safety, visual impacts, location and type of vegetation removed, and potential disturbance to wildlife.

- Supplemental vegetation along the edge of the peninsula between the two ponds, Boundary Pond and Depot Pond (see Location 2 on Map 2.4, page 16 and Photo 2.8, page 15), could create a buffer to provide separation between recreational and warehouse uses, upgrading the ponds as an amenity.
- Many opportunities exist for environmental restoration or enhancement that would increase the value of ecosystem services and benefits to the community. These opportunities include planting appropriate and beneficial species, removing invasive species, wetland enhancements, and installing improved stormwater management practices such as rain gardens. Functional enhancements would provide diversity and stability, buffer the impact of floods, retain stormwater, and improve water quality, air quality, and the microclimate in Upper Marlboro. These natural areas would also offer better cover and forage for wildlife living in and moving through these natural corridors.
- Depot Pond and Boundary Pond occupy an area that may have once, in pre-colonial times, been a large "oxbow lake," a bow-shaped stream bend near the junction of Western Branch and Collington Branch that became separated when the main channel shifted. The ponds are now cut off from Western Branch and Collington Branch by MD 725, the railroad, and to a lesser extent Marlboro Race Track Road. Reconnecting Collington Branch and Depot Pond via a small bridge or large culvert could provide environmental and recreational benefits (see Location 5 on Map 2.4, page 16).
- The bowl-shaped area at the end of Governor Oden Bowie Drive (see Location 4 on Map 2.4, page 16) provides multiple opportunities. An overlook in this area could help link the pedestrian route from Schoolhouse Pond and Darnall's Chance to the eastern ponds and the community center, creating a broader open space network. Any improvements require care and skill to balance development and the shoring up of the slope adjacent to MD 725/Main Street with protection of the wetlands and trees in the vicinity. Similar to the bowl-shaped area in Upper Marlboro, in Columbus, Indiana, Mill Race Park provides a precedent for recreational opportunities within a floodplain. (See Photo 2.10 on page 15.)

Map 2.5 Upper Marlboro—Publicly Owned Properties



2.3 Road Scenarios

Existing Conditions

The study area is bounded by major vehicular thoroughfares, including US 301/Crain Highway to the east and MD 4/ Pennsylvania Avenue to the south. A CSX rail line travels north-south, bisecting the study area. Community residents and business owners, as well as visitors, use MD 725/ Marlboro Pike to connect between US 301/Crain Highway and the town core of Upper Marlboro. As the gateway road into town, Marlboro Pike is the primary focus of this study. Within the study area, a mix of commercial and residential properties front Marlboro Pike. The majority of buildings are single-story with varying setbacks and individual driveway access off of Marlboro Pike. As noted previously, in Section 2.1 Environmental Constraints, a portion of Marlboro Pike (just west of MD 202/Largo Road and the bridge crossing the Western Branch and east to Marlboro Tire and the Village Shopping Center) floods and can become impassable during major storm events.

Countywide Master Plan of Transportation

The 2009 *Approved Countywide Master Plan of Transportation* (MPoT) indicates several proposed road improvements within and adjacent to the study area, as shown in Map 2.6 on page 20. The indicated improvements include:

- The realignment of US 301/Crain Highway, shifted to the east as a freeway with a new interchange at Pennsylvania Avenue/MD 4.
- The bypassed portion of US 301/Crain Highway (labeled "Old US 301") remaining as a local arterial.
- The realignment of MD 202/Largo Road, shifted to the east as an expressway (with a 120-foot to 200-foot right-of-way), connecting directly to US 301/ Crain Highway with a flyover above the CSX rail line.

While shown in the MPoT, road improvements in this area are not currently funded and, thus, are not scheduled for construction.

The following three road scenarios show new proposed streets within the redevelopment areas. Additionally, in order to lessen the environmental impacts, roadway construction costs, and disruption to local businesses, alternatives to the MPoT road improvements were analyzed

Photo 2.11: MD 725/Marlboro Pike—Looking Northeast

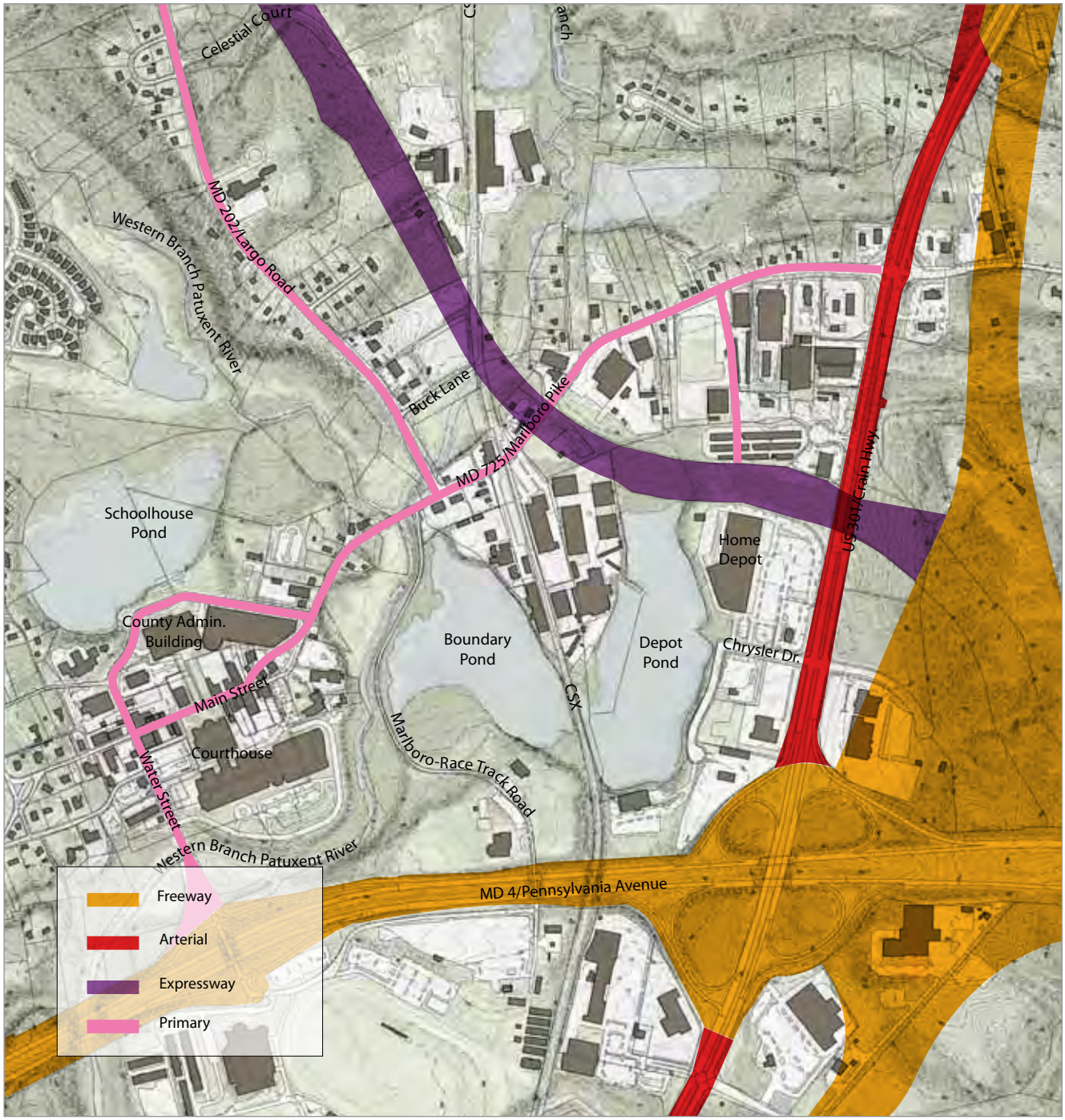
Photo 2.12: MD 725/Marlboro Pike—Looking Northeast

Photo 2.13: MD 725/Marlboro Pike—Looking East

Photo 2.14: MD 725/Marlboro Pike—Looking West

conceptually during this study. Through feedback received at the business community meetings (held in 2011) and stakeholder meetings, there is broad support for Road Scenario 3. In place of the heavy infrastructure shown in the MPoT road improvements, Road Scenario 3 shows a local network of streets (with a roundabout at the intersection of MD 725/Marlboro Pike and MD 202/Largo Road), no flyover, and less impact to environmentally sensitive areas near the Collington Branch of the Patuxent River and Depot Pond.

Map 2.6 Prince George's Countywide Master Plan of Transportation—Proposed Right-of-Ways



Scenario 1: Flyover Alignment

- Maintains the MPoT realignment of US 301/Crain Highway, with the new interchange at MD 4/ Pennsylvania Avenue.
- Maintains the MPoT realignment of MD 202/Largo Road, connecting directly to US 301/Crain Highway with the flyover above the CSX rail line.
- A limited local grid of streets is inserted in the redevelopment areas.

While maintaining the indicated MPoT road improvements, this flyover scenario, in effect, splits MD 725/Marlboro Pike to the east and west of the flyover, bypassing local businesses and largely impacting environmental areas.

Scenario 2: Bypass Alignment

- Maintains the MPoT realignment of US 301/Crain Highway with the new interchange at MD 4/ Pennsylvania Avenue.
- MD 725/Marlboro Pike remains for local access only with a possible gateway roundabout at the intersection of MD 725/Marlboro Pike and US 301/Crain Highway.
- MD 202/Largo Road remains connected to MD 725/Marlboro Pike with a fly-over bypass over rail line.
- A local grid of streets is inserted in the redevelopment areas.

This bypass scenario provides a much shorter fly-over condition, connecting the high ground along MD 202/ Largo Road, near Buck Lane, to the high ground on MD 725/Marlboro Pike. This shorter bypass provides an alternative route, avoiding the low areas along MD 725/Marlboro Pike that often floods during storm events, while limiting impacts to environmentally sensitive areas and reducing flyover roadway construction costs. While bypassing a portion of MD 725/Marlboro Pike, this approach does not physically and visually sever the road to the east and west to the extent that the MPoT flyover suggests.

Scenario 3: Local Alignment

- Maintains the MPoT realignment of US 301/Crain Highway, with the new interchange at MD 4/ Pennsylvania Avenue.
- MD 725/Marlboro Pike remains for local access only, with a possible gateway roundabout at intersection of MD 725/Marlboro Pike and US 301/Crain Highway.
- MD 202/Largo Road remains connected to MD 725/Marlboro Pike with a possible roundabout.
- A local grid of streets is inserted in the redevelopment areas.

This local, low-impact scenario provides a clear break from, and an alternative to, the MPoT proposed roadway realignments. A roundabout is suggested at the intersection of MD 202/Largo Road and MD 725/Marlboro Pike to allow for traffic movement while additionally creating a gateway to the town core (see Redevelopment, on page 35).

Prior to funding or constructing roadway improvements, further study should be undertaken to fully evaluate the alternatives to the high-impact, high-cost MPoT road improvements. Impacts to local businesses and environmentally sensitive areas should be analyzed, and pedestrian and bicycle connectivity should be considered along with vehicular movement. Future modification plans to MD 725/Marlboro Pike should consider life safety, particularly to address flooding issues as well as streetscape improvements, including continuous sidewalks and bike lanes, the addition of street trees, and the incorporation of rainwater planters to improve stormwater management (see Streetscape, on page 49.)

Map 2.7 Road Scenario 1: Flyover Alignment

Map 2.8 Road Scenario 2: Bypass Alignment

Map 2.9 Road Scenario 3: Local Alignment

3.0 MARKET STRATEGY

3.1 Market Strategy Introduction

This report provides key observations and strategic recommendations to help guide conceptual planning for the Greater Upper Marlboro study area. These recommendations are based on the findings of the market analyses for office, industrial, housing, and retail uses at the site. Input is provided relating to overall development concepts, marketing strategies, financing, and management.

3.2 Development Concepts

This study is primarily concerned with development scenarios for the existing US 301 alignment. While the proposal to relocate US 301 to the east has been a matter of state transportation policy for over 20 years, this proposal has not been prioritized and is not likely to be constructed in the foreseeable future. The concept of marketing the broader four-quadrant interchange for development has been included to provide market context.

Market Potential Summary

The overall market finding is that there is potential for development of a mixed-use node within the study area, largely because of regional transportation access and competitive advantages of the study area's location at the intersection of US 301 and MD 4. The overall market potential in this study area is summarized by use below:

Use	TOTAL
Industrial	170,000–300,000 SF
Office	14,500–84,000 SF
Retail-Hwy.	222,800 SF
Retail-Town	46,000 SF
Residential-MF	40–70 Units
Residential-SF	160–190 Units

The market analyses forecast demands of about 170,000 to 300,000 square feet of industrial use and 14,500 to 84,000 square feet of office use, depending on whether the study area is marketed as part of a larger regional interchange node. There was also a potential forecast for about 223,000 square feet of highway-oriented retail and 46,000 square feet of town center-oriented retail, both of which are dependent on a destination marketing strategy. There is residential demand for 40 to 70 multifamily units and 160 to 190 single-family units. Capturing this demand at the site is dependent on creating an appropriate and attractive environment for development and ameliorating any costs associated with floodplain development regulations.

The market for uses located in this node would be bifurcated between interchange-oriented versus town-oriented activities. Because of the site's transportation access and exposure, it has competitive advantages for attracting supply and distribution uses as well as commuter-oriented retail. At the same time, the Town of Upper Marlboro has potential to become more of a shopping and tourism destination, built on specialty businesses, restaurants, and entertainment, some of which could be located along Main Street. These two marketing concepts are not mutually exclusive as long as there are development standards and infrastructure upgrades to enable an appropriate environment for both. Thus, the two concepts, described as follows, can co-exist under certain conditions.

Interchange Development Concept

If the interchange area is marketed as a regional economic development hub, then there is more potential for redevelopment of the study area for industrial, office, and retail uses than there would otherwise be. Development recommendations under both scenarios (interchange versus study area only) are described below.

Upper Marlboro Business District. Much of the study area is already established as the industrial area for Upper Marlboro. The easiest and least costly approach to development would be to focus on business and industrial development in the central portion of the study area by establishing a more formal mixed-use business district. Giving definition to these older industrial areas will help market them and establish a hub for attracting other industrial businesses as well as office tenants. While there is existing land at present, the area is not marketed proactively as a regional business node. Therefore, it has not been successful in attracting new industry. A package of land, buildings, and incentives would help in this regard. Based on interviews held with existing businesses, there is the belief that the area is especially competitive for supply and distribution uses due to its location and transportation access.

Under the regional hub scenario, there would be a potential for about 300,000 square feet of industrial use and another 80,000 to 90,000 square feet of office use in the study area by 2020. In addition, there is potential demand for up to approximately 223,000 square feet of retail in the area if an anchor general-merchandise store can be recruited to the site. The overall demand for business space in this hub could be captured through development of an attractive business district environment.

Upper Marlboro Industrial District. Existing industrial uses as well as up to 300,000 square feet of additional industrial tenants could be integrated into the industrial sections of this mixed-use business district. Existing industrial areas would be given physical definition through signage, improved infrastructure (e.g., internal road network), and landscaping. There would be new industrial development on vacant sites as well as redevelopment of some existing industrial buildings to accommodate more modern supply, distribution, and potentially light-manufacturing uses. The industrial area would be integrated for marketing purposes with the office area. The industrial and office areas could also be physically integrated as long as there is no deleterious impact on the office environment. Sufficient truck access and parking would be required to support the study area's capture of industrial uses.

Upper Marlboro Retail Center. There is the opportunity to attract up to about 223,000 square feet of retail to the highway portions of the study area (on the east/south), but much of this capture hinges on recruitment of a large, general merchandise (GM) anchor that would help to spinoff demand for other retail "boxes," restaurants, and line merchants. Large-scale retail would, by necessity, be oriented to highway exposure. However, the design of retail sites should ensure integration with the overall high-quality, mixed-use business district environment and the heritage theme of the town core. The retail business mix for this area was described in the market analysis (see Appendix) to include clothing and accessories, pharmacy, auto supply, fast-food restaurants, and a "family entertainment" venue (which might also be located closer to the town core), in addition to the GM anchor. There is also potential demand for vehicle sales in this area, which could include used car sales, RV equipment, motorcycles, and other consumer vehicles.

While highway-oriented and big-box retail uses reinforce suburban development patterns, a large anchor superstore can have the impact of attracting consumers to the market and spinning off opportunities for town core merchants within Upper Marlboro. If consumers can be attracted to the area to shop, then they may extend their retail experience to specialty businesses within the downtown, thus helping to revitalize the town core. On the other hand, it will be challenging to create sufficient synergies to enable this spin-off given the distance

between US 301 and the center of town. Ideally, MD 725/Marlboro Pike would be upgraded and celebrated as an attractive gateway and primary linkage into the Town of Upper Marlboro.

Historic Town Center Concept

The Town of Upper Marlboro's town core has the potential to become/recapture a traditional role of the County Seat as a civic, cultural, residential, and commercial hub. While the town maintains its role as a service center for the courts, it lacks the traditional small-town functions that would appeal to residents and visitors alike. The town primarily lacks diversity and functionality in retail and cultural activities that help to enliven small towns. It is the retail and cultural activity that also helps to enhance the overall competitiveness of the town for business and for attracting and retaining residents. Such activities can be shown to enhance property values, again by leveraging the market for housing.

Main Street (MD 725 Specialty Retail Corridor). The retail market analysis identified the potential for about 46,000 square feet of "town center" retail business activity that could be envisioned as shared between the study area and the town core. A cultural venue would be an excellent anchor for revitalization of Main Street and can be complemented by commercial entertainment venues as noted above. Other uses include full-service restaurants, furniture and home furnishings, specialty home supply, garden/farm supply, hobby/toy shop, sporting goods store, computer/electronics, expanded office supply, gift/novelties/books, personal service establishments, and other business uses. As noted above, the "big box" development at the interchange can help to strengthen the destination market for uses within the town core if linked properly through physical design and heritage marketing.

These retail tenants would be integrated into existing ground-floor commercial buildings and also into new buildings that would be established along the MD 725/Marlboro Pike corridor west into the study area. Ideally, this concept aims to create a strong linkage between US 301, the business park, and the town core. Some of this use, such as a portion of the office supply, already exists within the study area, and the opportunity exists to reformulate the spaces and create better connectivity between the town core and the MD 725 corridor. Historic buildings, where they exist, would be restored and celebrated as part of the overall concept for the area. This concept does not preclude existing businesses but, instead, builds on and diversifies the existing mix. Office and bail bondsmen are not appropriate uses for ground-floor spaces on a commercial main street as they effectively create "dead space" that reduces the agglomeration effect for retail and the overall walkability of downtown for consumers. Such uses would provide viable opportunities for upper-floor spaces and in office buildings or secondary blocks that do not require main street exposure.

Residential. The residential market analysis suggests that there is potential for housing within or near the study area, including up to 70 multifamily units and 190 single-family units. Given that the market would be driven by relatively affluent empty nesters, there is the opportunity to develop housing in a traditional neighborhood development (TND) format that builds on the character of the revitalized core of the Town of Upper Marlboro. TND housing formats generally promote higher-density, single-family housing and some multifamily units within walking distance to shopping, culture, civic uses, and employment within the town core. Such development will help support the market for both specialty retail in the town core as well as the regional retail at US 301. Wooded walking/hiking/biking trails would connect the residential areas to areas around ponds and office and industrial areas. Utilizing the ponds' amenity value, coupled with a revitalized Main Street in the Town of Upper Marlboro, would create a very appealing environment for empty nesters and others seeking the small-town life in a major metropolitan area.

3.3 Marketing Recommendations

The development concepts translate into marketing strategies for redevelopment of the area as a mixed-use business, residential, and commercial node. Key aspects of marketing for these concepts to succeed are described below.

One Hundred Percent Interchange

As noted throughout the Market Analysis and Strategy Sections, there is the opportunity to leverage more economic development in the study area if it is marketed as part of a broader, regional interchange node. In this scenario, developed and undeveloped areas east of US 301 and south of MD 4 would be included in a broader, regional marketing strategy for development of this area. In this scenario, long-term opportunities for development east of US 301 would be identified, permitted, and promoted as a "bulb-out" exception to the restrictions on development east of US 301. Without this broader development and marketing strategy, the study area alone is more likely to capture a smaller share of the market. Even if development is not allowed east of US 301, there is a need to view existing and potential development areas as part of one node and to enhance the overall marketability of the entire interchange area.

Proactive Versus Reactive Marketing

Aligned with this interchange strategy is the underlying assumption that the county would be proactive, rather than reactive, in attracting development to this area. Such efforts may require public investments and financial incentives where the cost of development can be high. The county may have to be engaged in the relocation of businesses, for example, if new "higher and better" uses are identified. There is a cost to such action. At present, the Prince George's County's Economic Development Commission (EDC) is not prioritizing this area as a business node. This would require a dramatic shift in priorities at the county level to market a mixed-use business district at this site. The same proactive marketing requirements underlie the town core concept, which is built on a heritage destination marketing strategy.

Heritage Destination Marketing

Upper Marlboro is the historic County Seat, but the community's heritage could play a much bigger role in its economic health and revitalization. The historic buildings and sites within the community need to be highlighted and a focus placed on restoration of key landmarks, especially where these sites can help add a visible sense of identity and community heritage. (For additional information, see the Upper Marlboro Action Plan.) Unfortunately, some of the community's older tobacco warehouses and other agricultural and industrial heritage have been demolished. Where vintage buildings remain, a need exists to restore structures to their original context even if used for modern retail or industrial activities. Each of these sites adds local flavor and a unique vernacular to help strengthen the marketing identity.

Many communities in the Washington, D.C., region have seen the benefits of celebrating heritage to strengthen identity and recruit businesses and residential development. There is a need to focus on defining the identity of Upper Marlboro and on those aspects that make it unique to the region. More detailed assessment of the town's tourism and destination development potential is needed to establish the core marketing strategies. In the meantime, the following factors have been identified as key to the community's marketing image:

1. Agriculture and Natural Heritage
    a. Show Place Arena/Prince George's Equestrian Center
    b. Tobacco farms, warehouses/rail, and agricultural heritage
    c. Ponds and wetland natural heritage
2. Small Town Community
    a. County Seat
    b. Vintage small-town main street architecture
    c. Walkability and slower lifestyle
3. Unique History and Culture
    a. Heritage associated with Prince George
    b. The county's African-American heritage and strengths

"Strip" Commercial versus Intensive Use

The area will continue to attract "strip" commercial oriented to US 301 commuters unless interventions are made to create more of a unique destination and attract the destination shopper. New housing development could help drive demand for more intensive retail uses; however, some attractive retail will be necessary in order to leverage the market for housing. At present, Upper Marlboro has very little retail to attract homebuyers. Heritage-oriented marketing strategies will help but must be tied physically to the town core, which is the historic heart of the community. This can be accomplished in part with streetscape and urban design improvements along MD 725 accompanied by assembly of land for TND and retail development. Intensive retail would only succeed if marketed as part of this town center/corridor and as a destination-oriented (day trip, tourism, and commuter) component of the community.

Destination Recreation and Audience Support Uses

While not tested through market analysis, the opportunity does exist for more destination visitor uses, including audience support, recreation, and lodging. Also, an opportunity exists to maximize the benefits from floodplain restrictions, ponds, and natural amenities by creating public recreation amenities. Such amenities could be linked with the existing Show Place Arena and a heritage marketing strategy for town core retail to package Upper Marlboro as a visitor hub with small town amenities as noted above.

3.4 Financing and Management Recommendations

Key factors relating to financing and management of development are discussed below. More detailed strategies are identified and captured in the Implementation Action Plan.

Cost of Redevelopment

There are significant costs associated with development in an area with major physical constraints, including floodplain and insurance issues, potential "fly-overs" for Route 202, relocation of existing businesses, creation of a development environment, and redevelopment of existing sites. While there may be a market for certain types of development, there must be a financial return to developers from major investments such as building to floodplain standards. A cost-benefit analysis would be useful to contrast the high cost of redevelopment (floodplain, highway relocations) with returns from the land.

Infrastructure

There will likely be a need for infrastructure improvements, including streetscaping, road improvements, floodway mitigation, and public amenities. Flood mitigation financed by county or state government, or through federal programs, may be required in order to ameliorate the cost impacts on potential new development in the area. If such improvements are not financed, then it is likely that financial incentives will be required to attract investment. Financing approaches for these improvements should be identified based on the plan recommendations and any cost-benefit assessment relating to the flood control issues.

Management

There are two distinct but interrelated development and marketing strategies for the study area. Key linkages between the interchange nodes and the town core include infrastructure and public amenities, which would typically be implemented by public agencies. It is recommended that management of development and marketing in this area, however, be managed through a public/private partnership as outlined below.

Upper Marlboro Business District Management Authority. If county government is convinced that this interchange area can become an important priority zone for regional economic development, then EDC could take a lead in forming a special development district that would encompass the areas surrounding the interchange, including the study area as well as the town core. EDC would seek to recruit private master development partners, such as a TND developer and a business district developer (for the central/eastern portions), to collaborate on implementation of the plan.

This development district would be enabled with a management board (perhaps under a 10-year sunset provision) with authority to manage public infrastructure and amenity development, implementation of design standards, floodway mitigation and/or incentives, business recruitment (in collaboration with the developers), heritage presentation, tourism marketing, and business relocations. The board could be appointed by the County Executive and President of the Town of Upper Marlboro Commissioners and include public agency staff as well as property owners, key businesses, financial institutions, and the appointed master developers. The district would, in essence, support and enable the work of the private developers to revitalize and redevelop much of the study area. Administrative costs of the board would be funded by the county and the appointed private master developers.

4.0 REVITALIZATION AND DEVELOPMENT STRATEGY

4.1 Overview

The Revitalization and Development Strategy section provides recommendations for improvements and redevelopment within the Greater Upper Marlboro study area. These recommendations are based on the existing study area and environmental condition analysis (see Section 2.0 on page 7), market analysis (see Appendix on page 73), market strategy (see Section 3.0 on page 23), and stakeholder feedback from the business community meetings (see Section 1.0 on page 1). The recommendations are organized into three components: gateways and streetscape improvements, environmental and open space improvements, and redevelopment phasing.

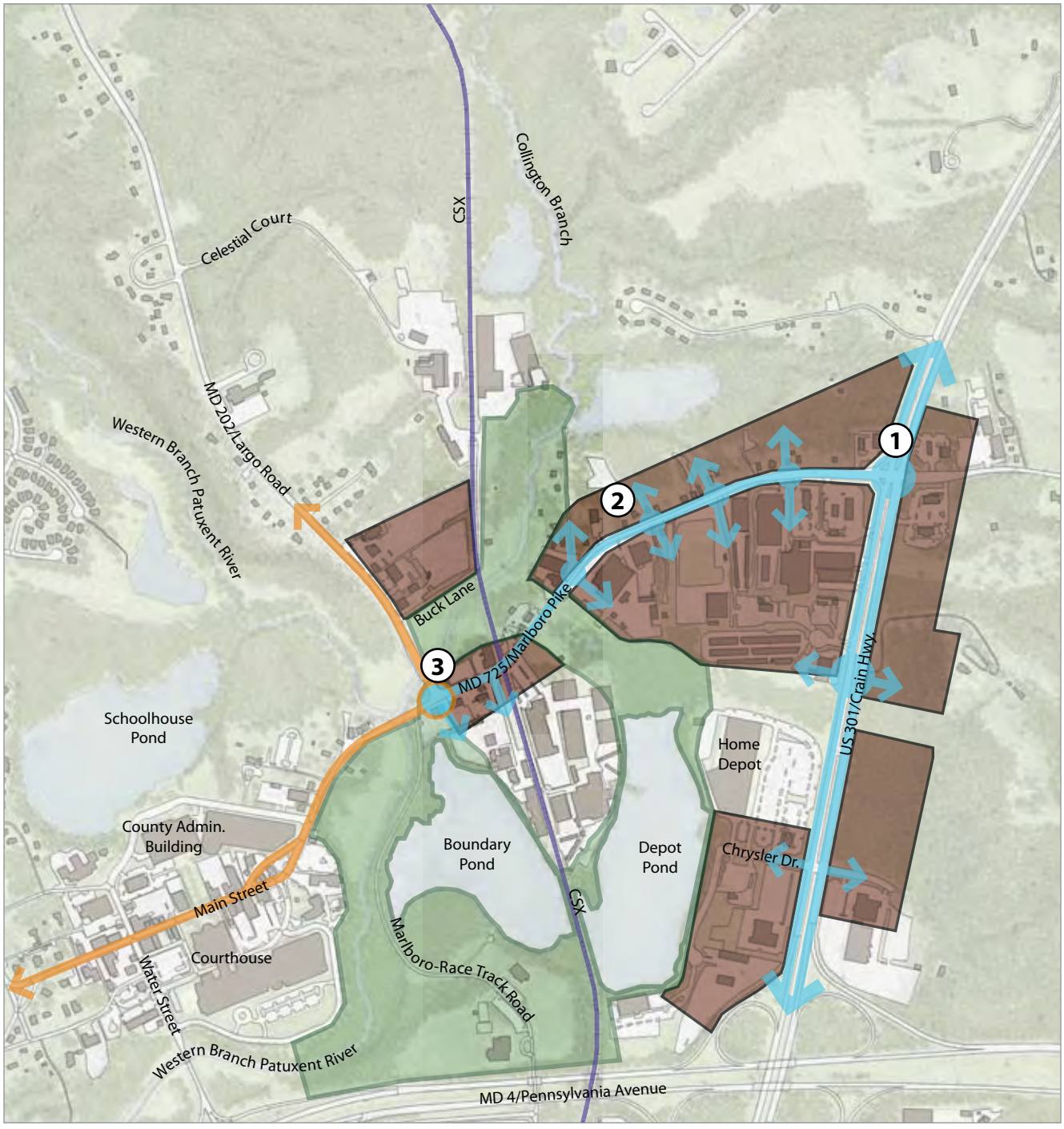
The Gateway and Streetscape Improvement section recommends potential gateway locations to identify the Town of Upper Marlboro and the proposed business district along MD 725/Marlboro Pike as well as streetscape improvements for the road network within the study area (see Map 4.1 on page 34). Plans and perspectives (see page page 35-page 38) for areas along Marlboro Pike show proposed streetscape enhancements as well as potential new development. Additionally, this section provides a "toolkit" of complete street elements, including street section details; bicycle facility details; and rainwater planter, tree pit, and garden details.

The Environmental and Open Space Improvements section identifies locations for potential passive, active, and educational amenities within the study area (see Map 4.2 on page 52). Plans and precedent images (see pages page 53-page 56) provide a vision for the proposed environmental restoration and open space amenities.

The Redevelopment Phasing section identifies redevelopment areas within the study area (see Map 4.7 on page 58) and organizes them into three phases. The phasing strategy includes time frames of 0–10 years, 11–20 years, and 20-plus years. Plans and precedent images (see page 59 to page 66) show the proposed conceptual layout and character of potential redevelopment.

4.2 Gateway and Streetscape Improvements

Map 4.1 Potential Gateway and Streetscape Improvements Diagram



KEY

- Town Identity
- Business District Identity
- CSX Rail Line
- Study Area

Gateway at US 301/Crain Highway—Detail Plan ①

At the intersection of US 301/Crain Highway and MD 725/ Marlboro Pike, a revised intersection is envisioned (see Photo 4.3, to the right, and Figure 4.6 on page 38). Whether as a revised intersection with medians, as shown here, or with a roundabout, the identity of the Town of Upper Marlboro and the business district should be expressed here. Signage, lighting, and landscaping should welcome visitors and the community to town. Expressing the identity and enhancing the character of this main gateway to town would help draw businesses and visitors to Upper Marlboro.

*All streetscape improvements are subject to the State Highway Administration (SHA) approval.

MD 725/Marlboro Pike—Detail Plan ②

Streetscape improvements along MD 725/Marlboro Pike should include the addition of bike lanes (see page 43-page 44), street trees, rainwater planters (see page 45-page 46), as well as continuous sidewalks and consolidated driveways. These improvements could be made as part of a larger strategy, addressing life-safety and flood concerns by raising portions of the roadway and managing stormwater. Additionally, these improvements may proceed and, therefore, incentivize new development or may be coincidental with new development. Street tree planting and parallel parking should alternate along the street to provide additional parking and shade as needed. Some variation in the planting rhythm would allow a less formal character appropriate to Marlboro Pike. In addition to the rainwater planters, a rainwater median should be installed where a central turn lane is not required to further manage stormwater.

Gateway at MD 202/Largo Road—Detail Plan ③

At the intersection of MD 202/Largo Road and MD 725/ Marlboro Pike, a roundabout is envisioned to accommodate vehicle movement and the realignment of Marlboro Race Track Road. Additionally, the roundabout, with landscape and signage improvements, will signify and be a gateway into the town core. Signage should highlight the main destinations downtown, such as the courthouse, Darnall's Chance, and the County Administration Building, to direct visitors.

Photo 4.1: Gateway at MD 725 and MD 202

Photo 4.2: Streetscape improvements along MD 725

Photo 4.3: Gateway at MD 725 and US 301

See Map 4.1 for study area locations.

① Gateway at MD 725/Marlboro Pike and MD 202/Largo Road

Figure 4.1 Existing view of MD 725/Marlboro Pike and MD 202/Largo Road intersection looking west

Figure 4.2 Conceptual perspective of MD 725/Marlboro Pike and MD 202/Largo Road looking west

② MD 725/Marlboro Pike Streetscape

Figure 4.3 Existing view of MD 725/Marlboro Pike looking west

Figure 4.4 Conceptual perspective of MD 725/Marlboro Pike looking west

③ Gateway at MD 725/Marlboro Pike and US 301

Figure 4.5 Existing aerial perspective of MD 725/Marlboro Pike and US 301 intersection

Figure 4.6 Conceptual perspective of MD 725/Marlboro Pike and US 301 intersection

Gateway and Streetscape Improvements—Complete Streets

Complete streets are streets that provide safe and convenient accommodation to all potential users, including pedestrians, cyclists, cars, and transit vehicles alike. Complete streets recognize that crossing the street, walking to shops, and cycling to work are equally as important as driving. Complete streets enable transit to be an efficiently accommodated and recognized mode of transportation. Since streets will play an important role in the study area, they must accommodate all users (whether young or old) motorists or cyclists, walker or wheelchair users, bus riders, or shopkeepers. A network of complete streets, together with necessary physical, design, and visual elements, will enable the study area to be safer, more livable, and welcoming to everyone. Sustainable design elements, including stormwater management, native planting, sustainable materials, and efficient lighting, contribute to the overall comfort, safety, and natural resource benefits that are part of complete street design.

Complete street design is broken down into two zones: the travel lane zone, which includes bicycle and vehicular travel lanes, and the sidewalk zone, which includes parking lanes, stormwater management, street trees, and all other elements within the sidewalk. (See Figure 4.7 on page 40)

The following pages depict street sections as well as improvements along MD 725/Marlboro Pike and other streets within the study area.

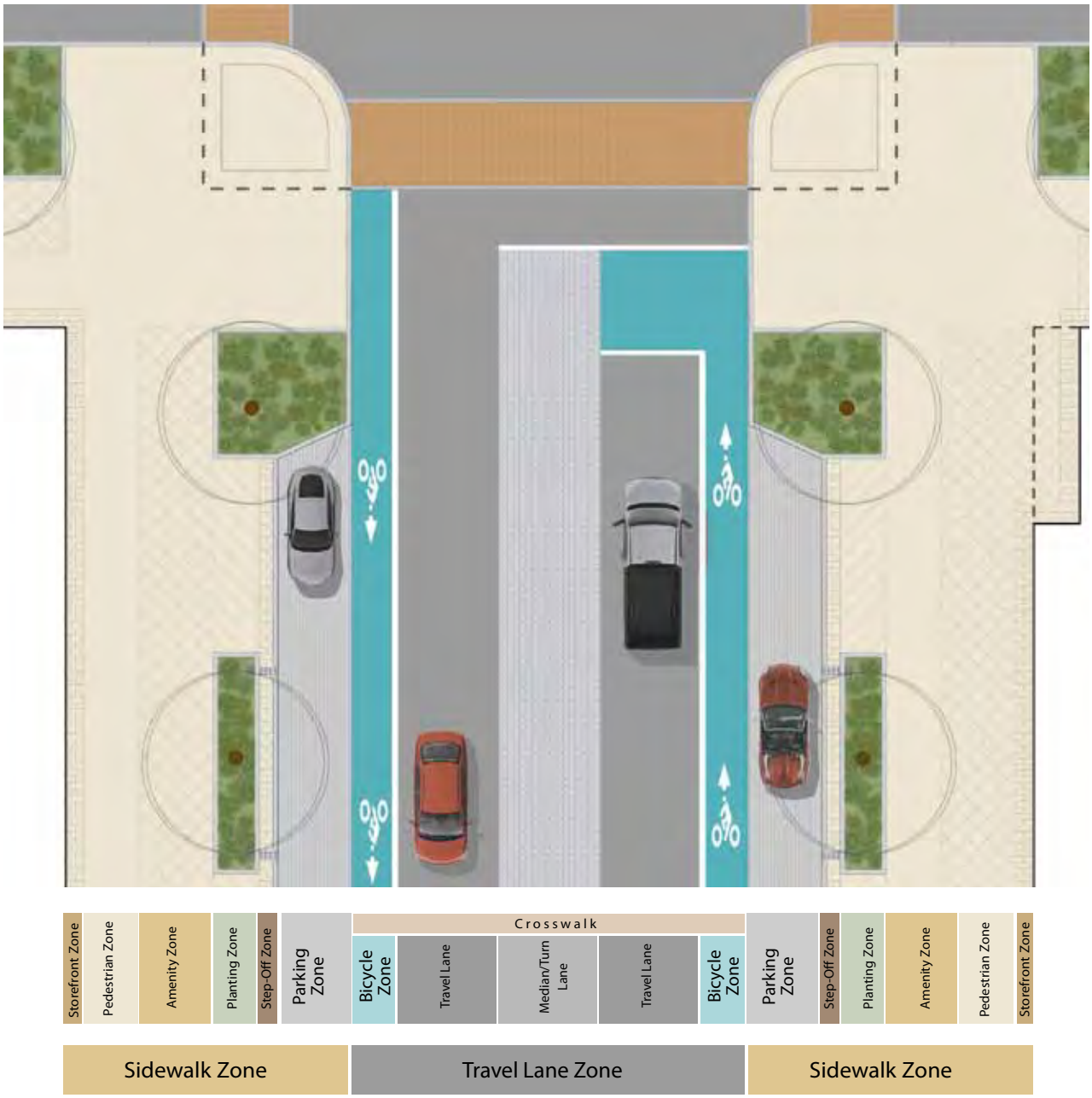
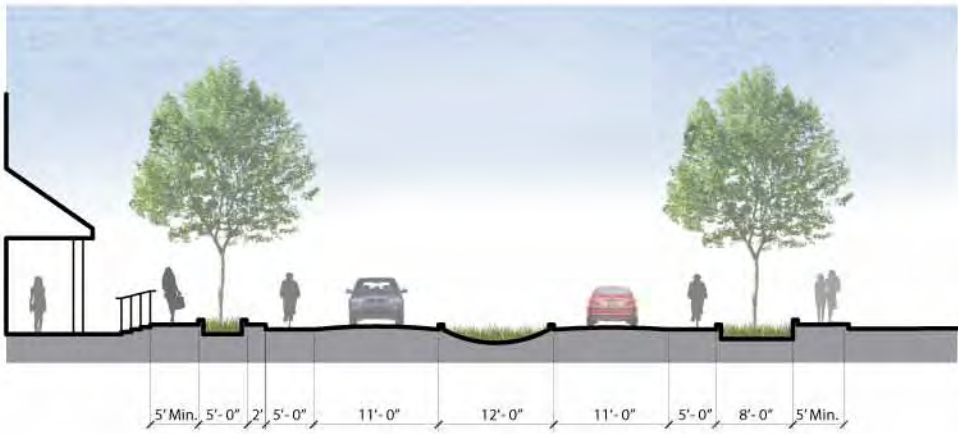


Figure 4.7 Complete Street Diagram



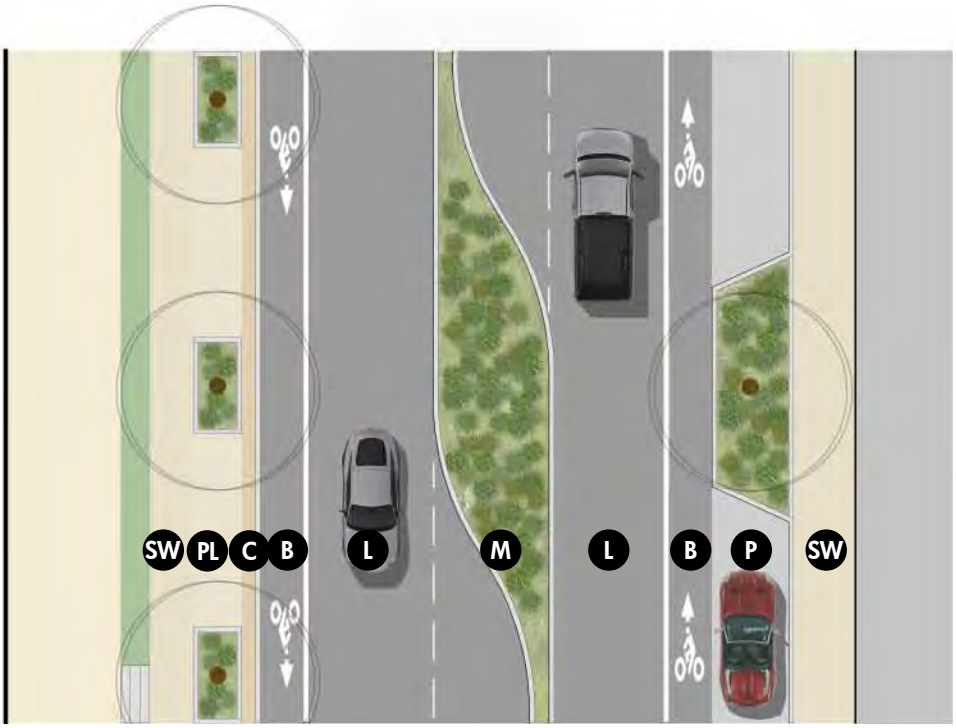
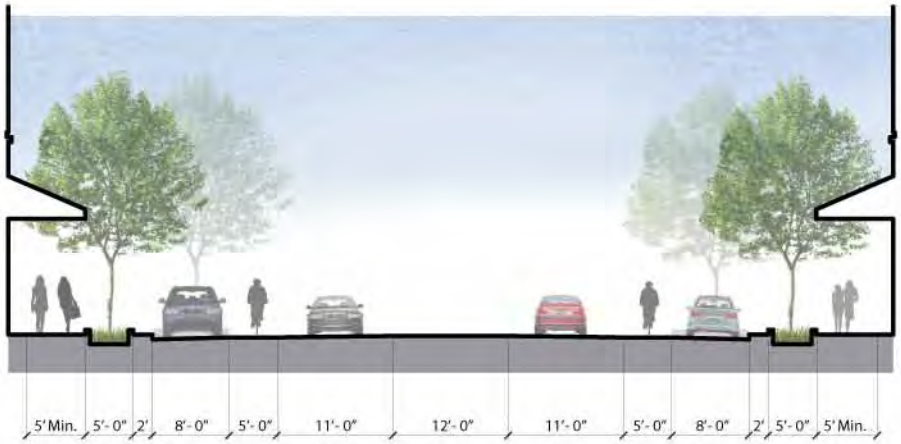


Figure 4.8 Typical MD 725/ Marlboro Pike Street Section with Median and Plan

- **SW** 5' Minimum Sidewalk Zone
- **PL** 5' Planting Area (Reference Rainwater Planters on page 45)
- **C** 2' Curb Step-Off Area
- **P** 8' Parallel Parking (Optional)
- **B** 5' Dedicated Bicycle Lanes (Reference Dedicated Bicycle Lanes on page 43)
- **L** 11' Travel Lane
- **M** 12' Median (Reference Rainwater Garden/Bioswales on page 49)



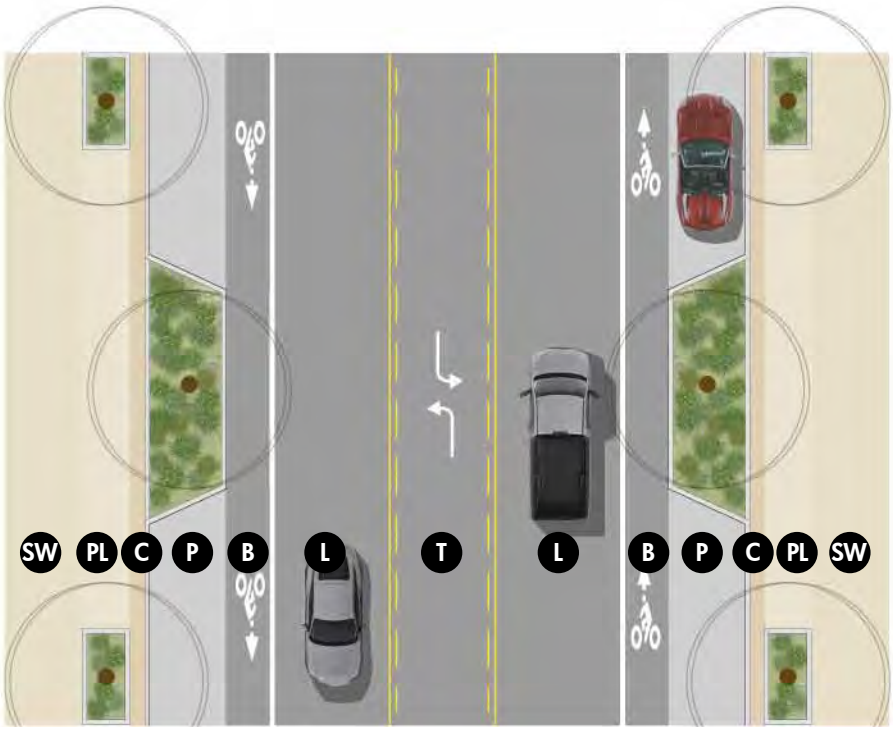


Figure 4.9 Typical MD 725/Marlboro Pike Street Section with Turn Lane and Plan

- **SW** 5' Minimum Sidewalk Zone
- **PL** 5' Planting Area (Reference Rainwater Planters on page 45)
- **C** 2' Curb Step-Off Area
- **P** 8' Parallel Parking (Optional)
- **B** 5' Dedicated Bicycle Lanes (Reference Dedicated Bicycle Lanes on page 43)
- **L** 11' Travel Lane
- **T** 12' Turning Lane (as required)

Dedicated Bicycle Lanes

Dedicated bicycle lane delineation should be marked with a six-inch, solid white line. Solid colors may be used to fill in bicycle lanes to make drivers more aware of bicycle traffic. Bicycle lane width shall be five-foot minimum from edge of curb to furthest edge of bicycle lane stripe. This solid color painted area should be four feet wide to allow one foot of unpainted concrete lip. The advanced stop line, which outlines the "Bike Box" stop area ahead of motor vehicles at intersections, shall measure 15 feet from edge of bike lane to edge of driving lane. Symbol spacing should be two–four per block in an urban setting and 0.1–0.5 miles in a suburban setting.

All bicycle lane markings should be white and retroreflective.

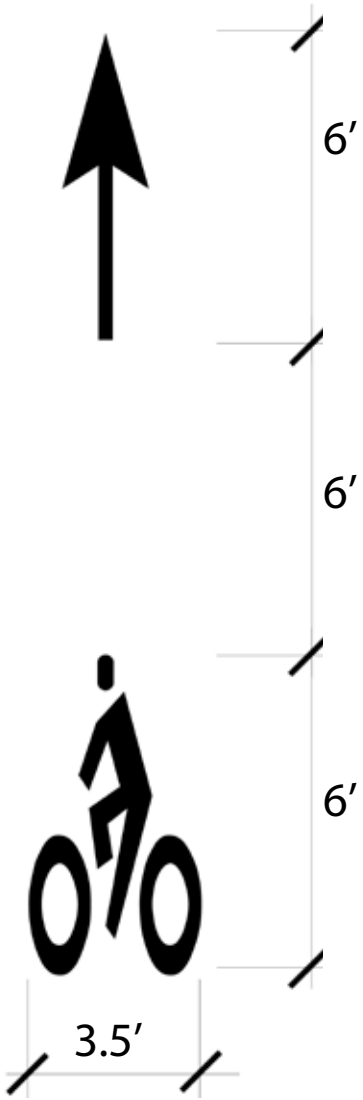


Figure 4.10 Bicycle lane marking detail

Photo 4.4 Bike Box Example

Photo 4.5 Dedicated Bicycle Lane Example

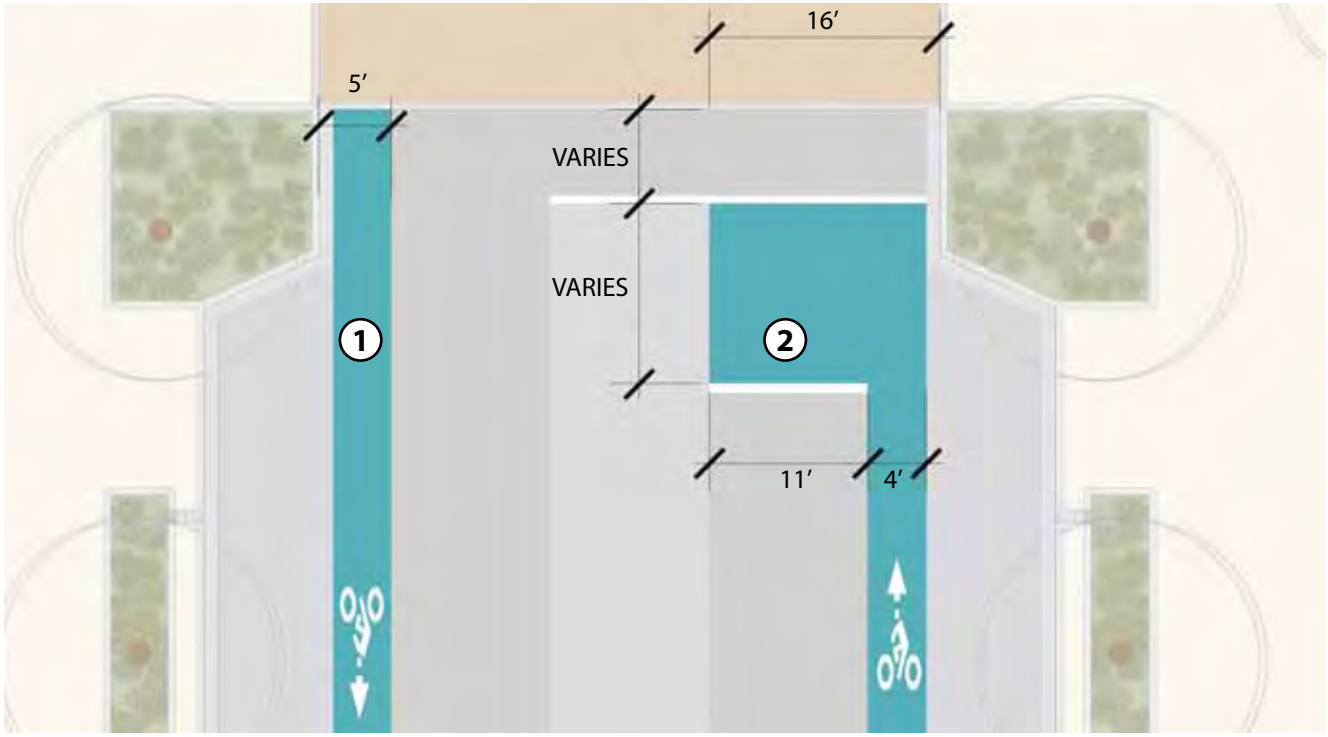


Figure 4.11 Dedicated bike lanes diagram

1 Bicycle Lanes

Bicycle lanes are clearly marked travel lanes designated for bicyclists only and within the street adjacent to the curb edge or on-street parking. Bicycle lanes shall be separate from vehicular travel lanes. Bicycle lanes shall be one way with the flow of traffic and on both sides of the street. A distinctive fill color may be used, as well as bicycle symbol stencils. All bicycle lanes within Upper Marlboro should have the same width, color, and markings. Bicycle lanes should not extend through intersections.

2 Bike Box

At intersections, bicycle lanes may include bike boxes that extend out into the travel lane and create a special stopping area, allowing bicyclists to stop in front of vehicles. This area enables bicyclists and bicycle lanes to be clearly visible to turning vehicles. Bike boxes shall match the color and design of bicycle lanes.

Rainwater Planters

Rainwater planters should be used along MD 725/Marlboro Pike and other streets within the study area as a means of capturing, treating, and returning rainwater to the ground or allowing for evaporation. Along streets, rainwater planters should be incorporated to increase the permeability of the ground plane and capture stormwater runoff from paved areas. These planters should be integrated into the overall design of the streetscape.

Recommended rainwater planter details:

- Rainwater planters shall be a minimum of 30 square feet and a minimum of four-feet wide; five feet by eight feet is recommended. Along residential streets or where limited pedestrian activity is anticipated, planters may be elongated.
- Rainwater planters shall be recessed to accommodate stormwater collection, with a 4–6 inch curb or border or a low, 8–12 inch fence.
- The design should be consistent along both sides of the street and for the entire block. However, the design of rainwater planters may vary from block to block, as long as the placement and rhythm is logical.
- Narrow, street-edge rainwater planters should have a more formal planting arrangement.
- Transition zones close to natural or restoration areas or amenity spaces should have a more informal planting plan arrangement.
- Select plant species native to Maryland and the Piedmont physiographic province.
- Choose plants that are tolerant of well-drained conditions, periods of drought, and periodic inundation, depending on the hydrologic design of the stormwater practice per MDE regulations.
- Select shade tolerant, partial shade, or full sun tolerant species based on site location, orientation, and proximity to tree cover and buildings.
- Consider maintenance and management (weeding) when designing, and allow for access needs.
- Consider plant height at maturity, and include consideration for sight lines (e.g., vehicular and pedestrian), safety and security, access to sidewalks, and overhead height restrictions.
- Along the street edge, trees shall be limbed to eight feet clear for visibility and safety.
- Design for complementary mixtures of foliage to provide interest and contrast in form, texture, and color; select plants that provide diverse seasonal color, texture, and fragrance.

*All Streetscape improvements are subject to SHA approval.

Photo 4.6 Rainwater Planter, Portland, OR

Photo 4.7 Rainwater Planter, Kitchener, Ontario


Photo 4.8 Rainwater Planter, Kitchener, Ontario

Photo 4.9 Rainwater Planter, Portland, OR

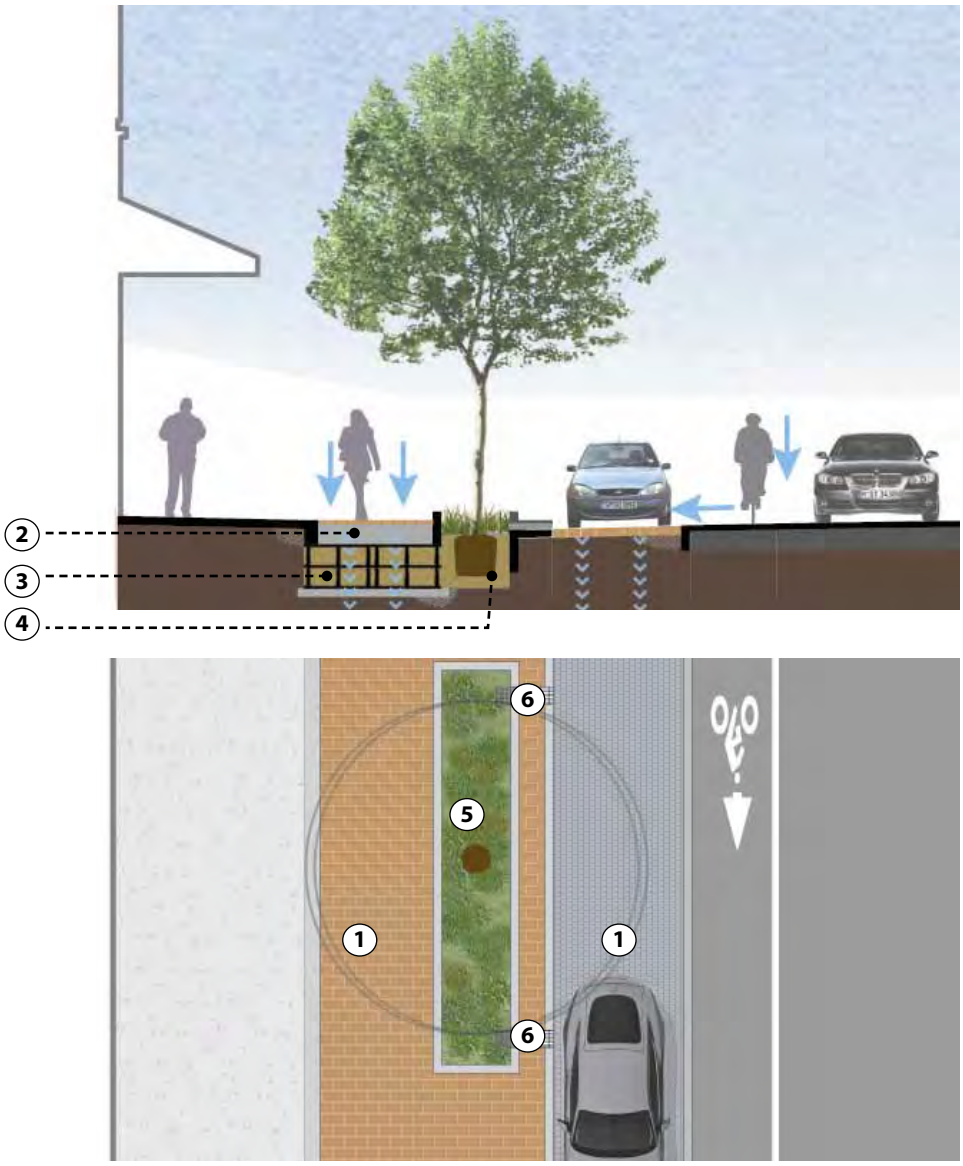


Figure 4.12 Rainwater Planter Diagram

1. Porous Pavement or Permeable Pavers for Parallel Parking and Sidewalks (optional)
2. Permeable Subbase
3. Uncompacted Soil Media
4. Silva Cell or Other MDE Approved Systems (optional)
5. Rainwater Planter
6. Curb Inlet

Rainwater Tree Pits

Rainwater tree pits, as illustrated on the facing page, can provide two advantages over the typical tree pit: longevity and stormwater infiltration. Rainwater tree pits capture and infiltrate stormwater along a street. When combined with a structural grid (such as silva cells or structural soil) the capacity to capture rainwater is increased, creating a cavity to store additional water while allowing tree root growth. The structural grid supports the hardscape and pedestrian or vehicular loads above while keeping the soil around tree roots from compacting and stunting the growth of the tree.

Recommended Rainwater Tree Pits details:

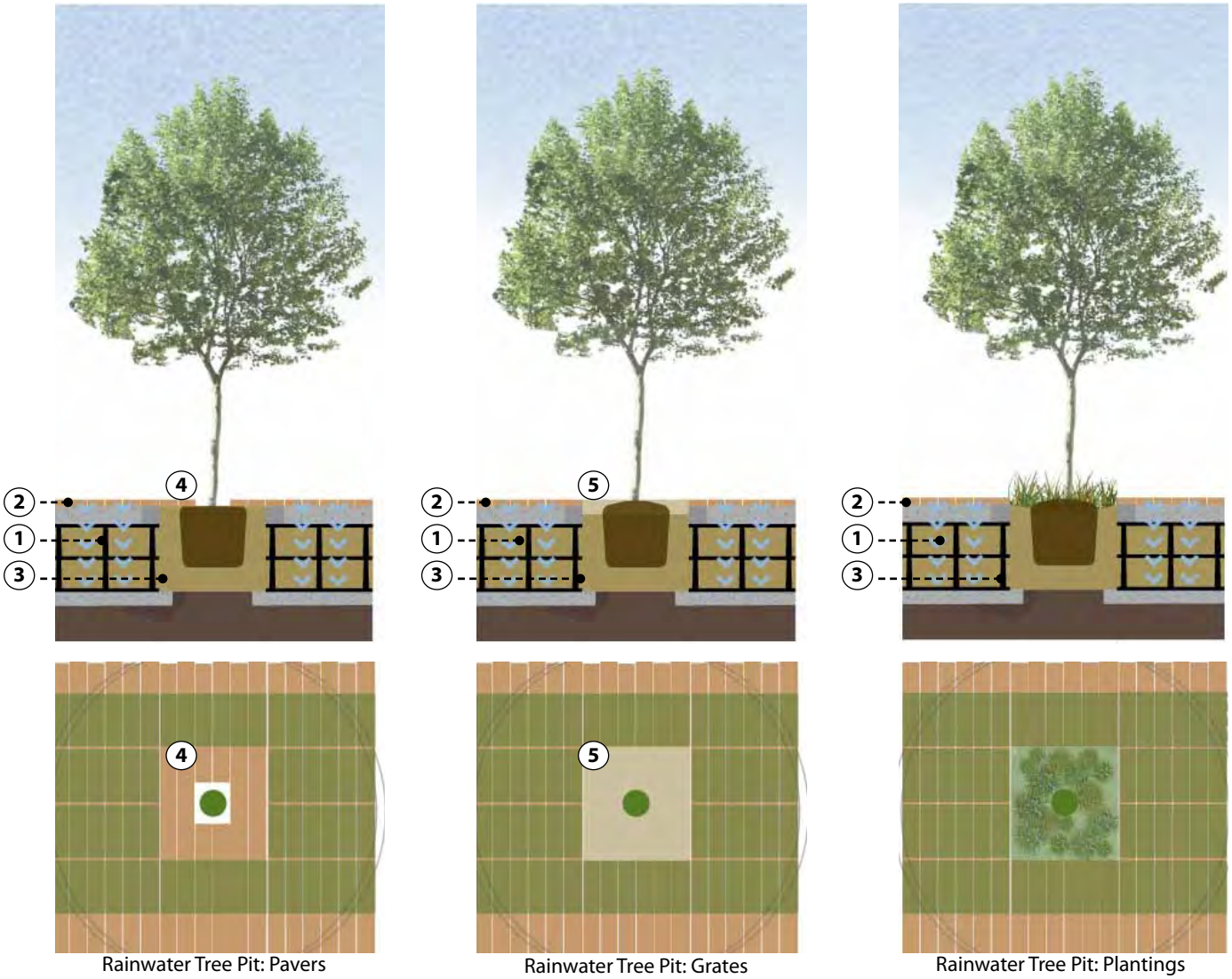
Rainwater tree pits can be detailed in three ways, with tree grates, permeable pavers, or plant materials at the surface (see Figure 4.13 on page 48). The method should be chosen according to the volume of pedestrian traffic, the surrounding materials, and soil conditions.

*All streetscape improvements are subject to SHA approval.

Photo 4.10 Tree Pit, Minneapolis, MN

Photo 4.11 Tree Pits, Lincoln Center, NY, NY

Photo 4.12 Silva Cell Construction,
Lincoln Center, NY, NY



Rainwater Tree Pit: Pavers

Rainwater Tree Pit: Grates

Rainwater Tree Pit: Plantings

Figure 4.13 Rainwater Tree Pit Diagram

1. Silva Cell or Other MDE Approved Systems (optional)
2. Permeable Subbase
3. Uncompacted Soil Media
4. Permeable Pavers
5. Grates

Rainwater Gardens/Bioswales

Rainwater gardens (also know as bioswales or vegetated swales) are a form of bioretention that is used to capture and filter or evapotransporate stormwater. Within the study area, rain gardens shall be used for this purpose but detailed in a manner consistent with the town character and streetscape.

Recommended Rainwater Garden details:

- Select plant species native to Maryland and the Piedmont physiographic province.
- Choose plants that are tolerant of well-drained conditions, periods of drought, and periodic inundation, depending on the hydrologic design of the stormwater practice per MDE regulations.
- Select shade tolerant, partial shade, or full sun tolerant species based on site location, orientation, and proximity to tree cover and buildings.
- Consider maintenance and management (weeding) when designing, and allow for access needs.
- Consider plant height at maturity, and include consideration for sight lines (e.g., vehicular and pedestrian), safety and security, access to sidewalks, and overhead height restrictions.
- Design for complementary mixtures of foliage to provide interest and contrast in form, texture, and color; select plants that provide diverse seasonal color, texture, and fragrance.
- Along the street edge or where ground floor retail is located, trees shall be limbed to eight-feet clear for visibility and safety.
- Select flowering species that attract wildlife, including hummingbirds, skippers, moths and butterflies, songbirds, and additional pollinators.
- Design for a meadow-like mixture of herbaceous plant texture, height, and color with some groves of small–medium height trees as appropriate to space and design constraints.
- In this more organic/natural arrangement, plantings are typically free-form but include grouped species. Plant shrubs in groups of three–five of the same species and plant herbaceous plants in groups of five–seven (or more for large areas) unless a more random planting arrangement is desired.

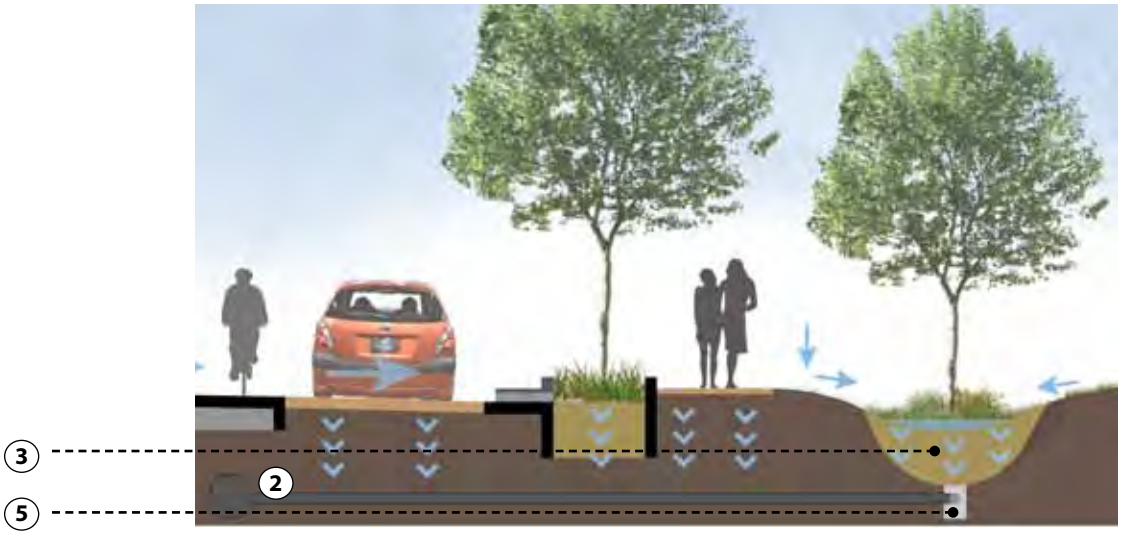
*All streetscape improvements are subject to SHA approval.

Photo 4.13 Rain Garden, Brisbane City Hall, CA

Photo 4.14 Bioretention, The Meriwether, Portland, OR

Photo 4.15 Rain Garden, Portland, OR

Photo 4.16 Rain Garden, Portland, OR



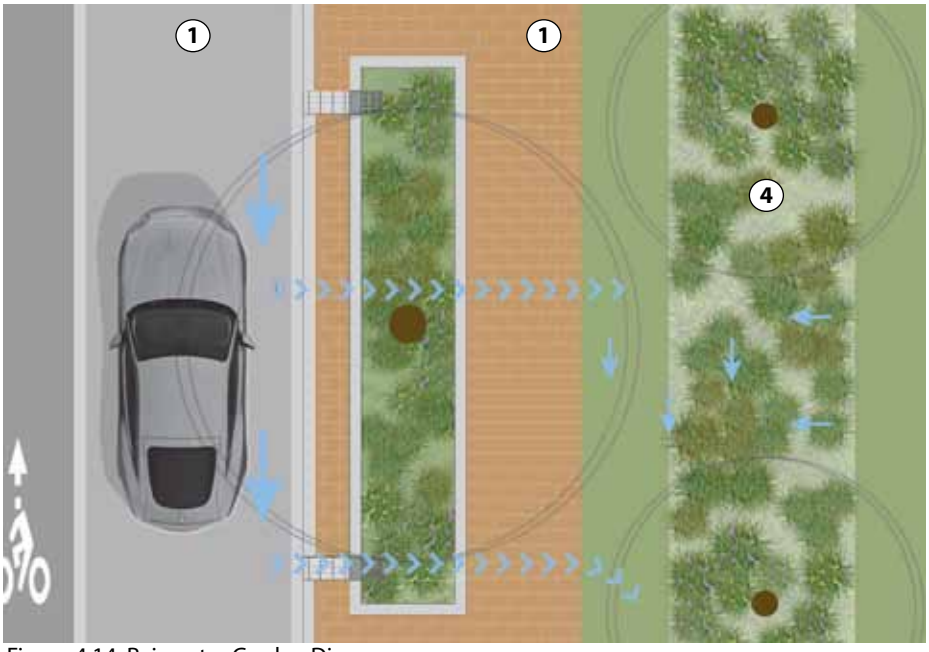


Figure 4.14 Rainwater Garden Diagram

1. Porous Pavement or Permeable Pavers for Parallel Parking and Sidewalks (optional)
2. Storm Drain
3. Uncompacted Soil Media
4. Rainwater Planters/Bioretention/Bioswale
5. Exfiltration Trench with Overflow Pipe

4.3 Environmental and Open Space Improvements

Overview

The open space within the study area is a potential hub for regional recreation as a significant element of Prince George's County's green infrastructure network connecting to the Patuxent River Park. The environmental areas within the study area contain large viewsheds that can draw visitors to this location as well as an abundance of natural resources, including a large number of wetlands, tributaries, and wooded lowlands. These areas provide diverse habitat sfor wildlife and easy access for residents and visitors to experience and observe the natural environment in a relatively undisturbed setting.

Many opportunities exist for environmental restoration or enhancement, including the planting of supplemental vegetation along the edge of the peninsula between Boundary and Depot Ponds, creating a buffer between recreation and warehouse uses, and upgrading the ponds as an amenity. These enhancements would buffer the impact of floods, retain stormwater, and improve water and air quality.

Carefully located amenities within the floodplain can draw visitors and make use of otherwise undevelopable areas. These locations, viewed in greater detail on the following pages, include:

1. The bowl-shaped area at the end of Governor Oden Bowie Drive.
2. The high ground between Buck Lane and Collington Branch.
3. The wooded wetlands along Marlboro Race Track Road near the community center.
4. The periphery of Boundary and Depot Ponds.

As further floodplain studies are undertaken, stormwater management and amenities should be planned in unison. Those projects that can achieve improvements to stormwater management, while providing an amenity to local residents, workers, and visitors should be prioritized.

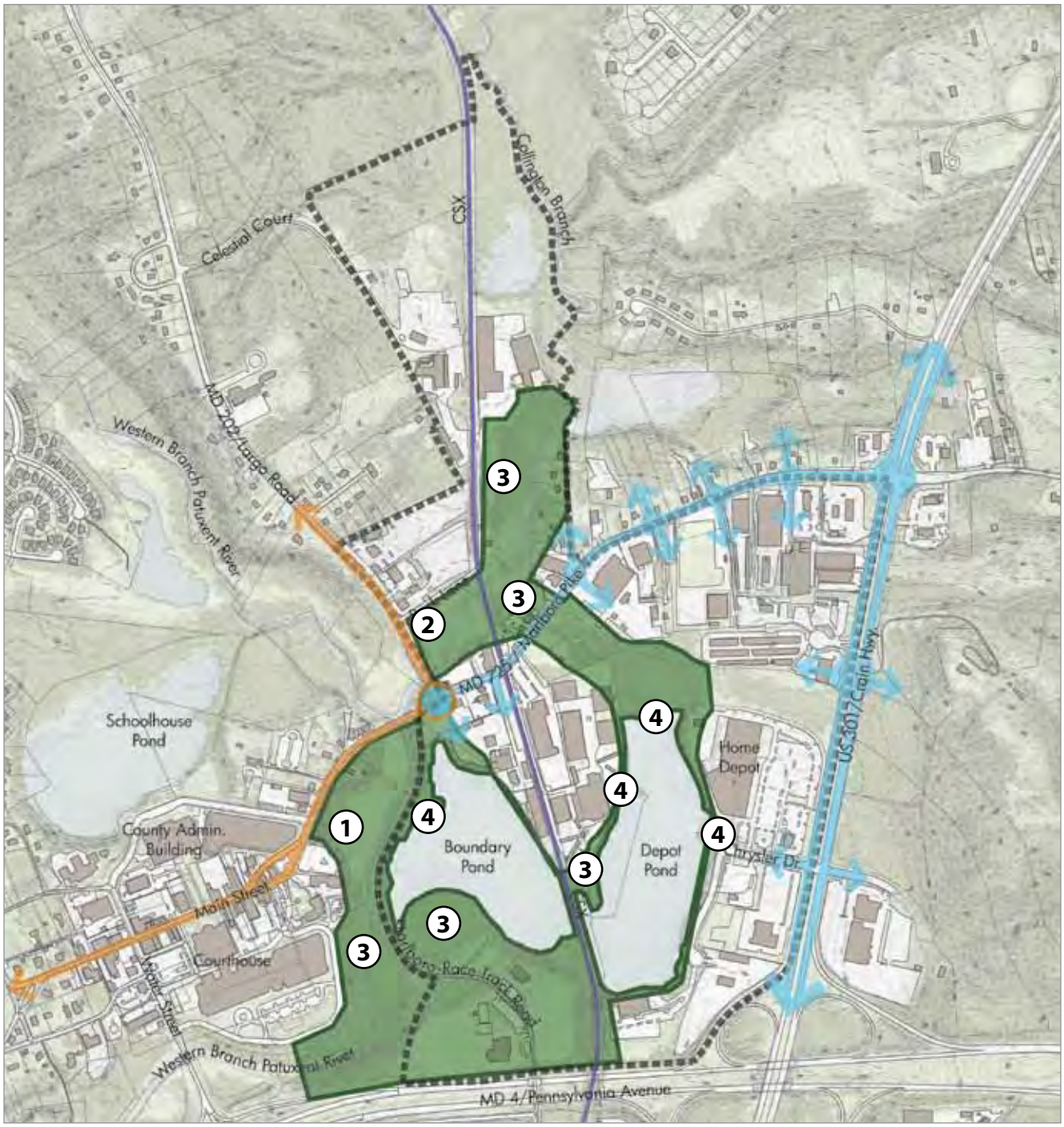
Photo 4.17 Park in Floodplain, Mill Race Park, IN

Photo 4.18 Wetland Amphitheater, Portland, OR

Photo 4.19 Wooded Path, Mill Race Park, IN

Photo 4.20 Schoolhouse Pond Boardwalk, Upper Marlboro, MD

Map 4.2 Potential Environmental and Open Space Improvements Diagram
(See reference images on the facing and following pages)



KEY

- Potential Environmental and Open Space Improvement Areas
- Town Identity
- Business District Identity
- CSX Rail Line
- Study Area

① Overlook/Community Park

This bowl-shaped area located at the end of Governor Oden Bowie Drive (see Map 4.3 below) lies largely within the floodplain on property owned predominantly by Prince George's County.

Mill Race Park in Columbus, Indiana (see Photo 4.17 on page 51) provides a precedent for fully utilizing a flood prone area for recreation and stormwater management.

An amenity in Area 1 (see Map 4.3 below), such as a pavilion or terraced seating could help link the pedestrian route from Schoolhouse Pond and Darnall's Chance to the eastern ponds and the community center, creating a broader open space network.

Photo 4.21 Community Festival, Mill Race Park, IN

Photo 4.22 Pavilion, Collin County Adventure Camp, TX

Map 4.3 Environmental and Open Space Improvements Diagram—Community Park

Photo 4.23 Recreational Activity—Canoeing

Photo 4.24 Outdoor Education Area, Collin County, TX

(2) Recreation Area

The high ground between Buck Lane and Collington Branch could be used by an outfitter or for other recreational, educational, and environmental activities.

A recreational outfitter could locate in Area 2 or facilities could be provided for people hiking or canoeing as the starting point for launching into the Western Branch and connecting to regional waterways of the Patuxent River.

Tiered seating installed here (see Photo 4.24) would provide an outdoor classroom for local schools, scout troops, and other groups to experience and observe the natural environment with easy access for residents and visitors.

Map 4.4 Environmental and Open Space Improvements Diagram—Recreation Space

③ Wooded Wetlands

The wooded wetlands located at the south end of Boundary Pond along Marlboro Race Track Road is a rich habitat for birds, frogs, and insects as well as home to a variety of wetland plants.

This area could be enhanced with boardwalks and learning stations, providing a living classroom environment as a loop accessible from Marlboro Race Track Road and near the community center.

Photo 4.25 Pathway, Shangri La Botanical Gardens, TX

Photo 4.26 Wooded Wetlands Located in Study Area

Map 4.5 Environmental and Open Space Improvements Diagram—Wooded Wetlands

Photo 4.27 Boardwalk, Havre de Grace, MD

Photo 4.28 Learning Station, Havre de Grace, MD

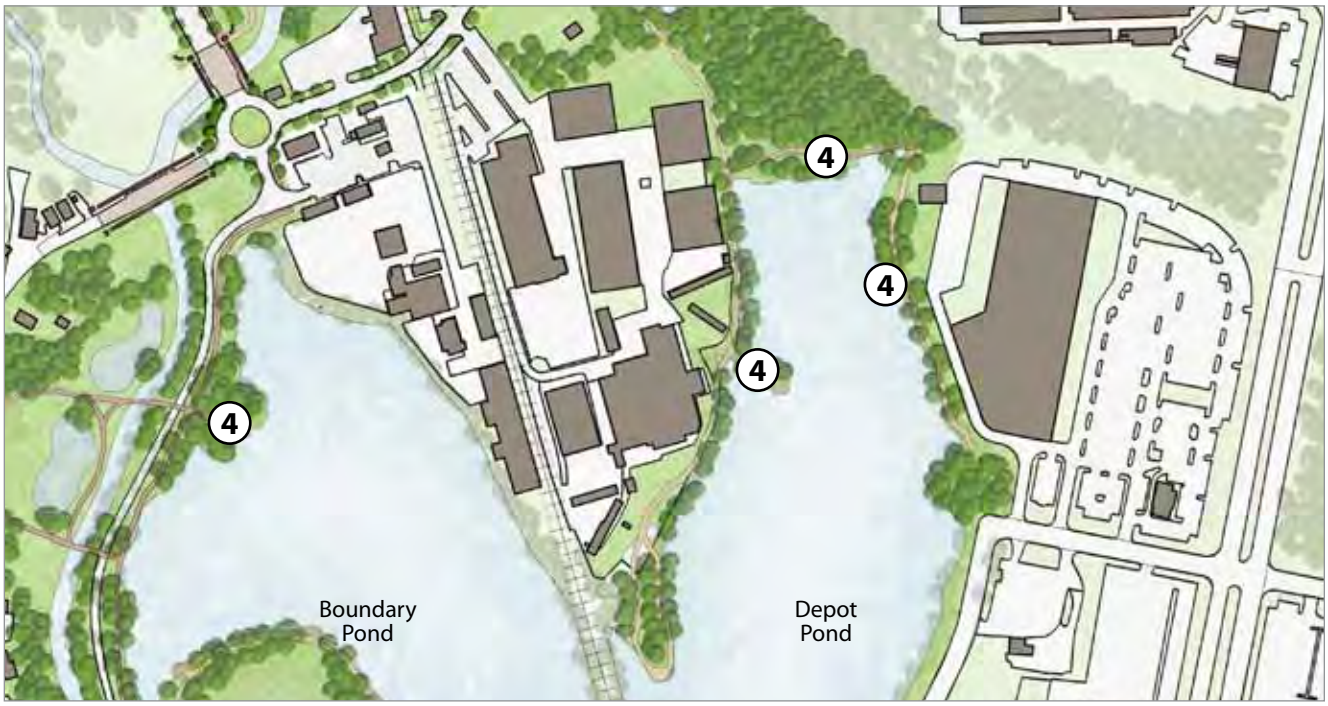
④ Boardwalk and Learning Stations

The periphery of the peninsula between Boundary and Depot Ponds is currently largely hidden, industrialized, and inaccessible.

Boardwalks with learning stations (as shown in Photos 4.27 and 4.28) could be added to Boundary and Depot Ponds to create a larger circuit and open up recreational opportunities.

A crossing of the CSX rail line at the southern end of the peninsula is unlikely. A trail crossing of the rail closer to MD 4/Pennsylvania Avenue should be investigated to provide connectivity around Depot Pond to the community center and Marlboro Race Track Road.

Map 4.6 Environmental and Open Space Improvements Diagram—Boardwalk and Learning Centers



4.4 Redevelopment Phasing

Overview

The redevelopment strategy for the study area covers three phases. The first two phases span a 20-year period, while the final phase shows a potential full buildout beyond the 20-year period. The strategy provides a vision for the revitalization of the study area and recommended locations for development and amenities.

The MD 725/Marlboro Pike corridor is envisioned as a mixed-use street consisting primarily of commercial uses. Utilizing a complete street approach, MD 725 will provide a safer environment for pedestrians, cyclists, and vehicles. As envisioned, new development lining the corridor will provide fairly continuous building frontage along MD 725, providing energy and activity to the streetscape. The redevelopment of the corridor will provide new gateway entries for Upper Marlboro as well as strengthen the connection from US 301/Crain Highway to the town core. From the gateway entrance at the intersection of MD 725/Marlboro Pike and US 301, the business district identity could be established and promoted to increase the interest of new businesses to the area. Traveling west on MD 725, at the intersection of MD 202/ Largo Road, a gateway entrance to the town core could be established, promoting the town's identity and destinations.

The improvement of the environmental areas and the completion of an open space and trail network will provide Upper Marlboro with a regional amenity and help address flooding issues.

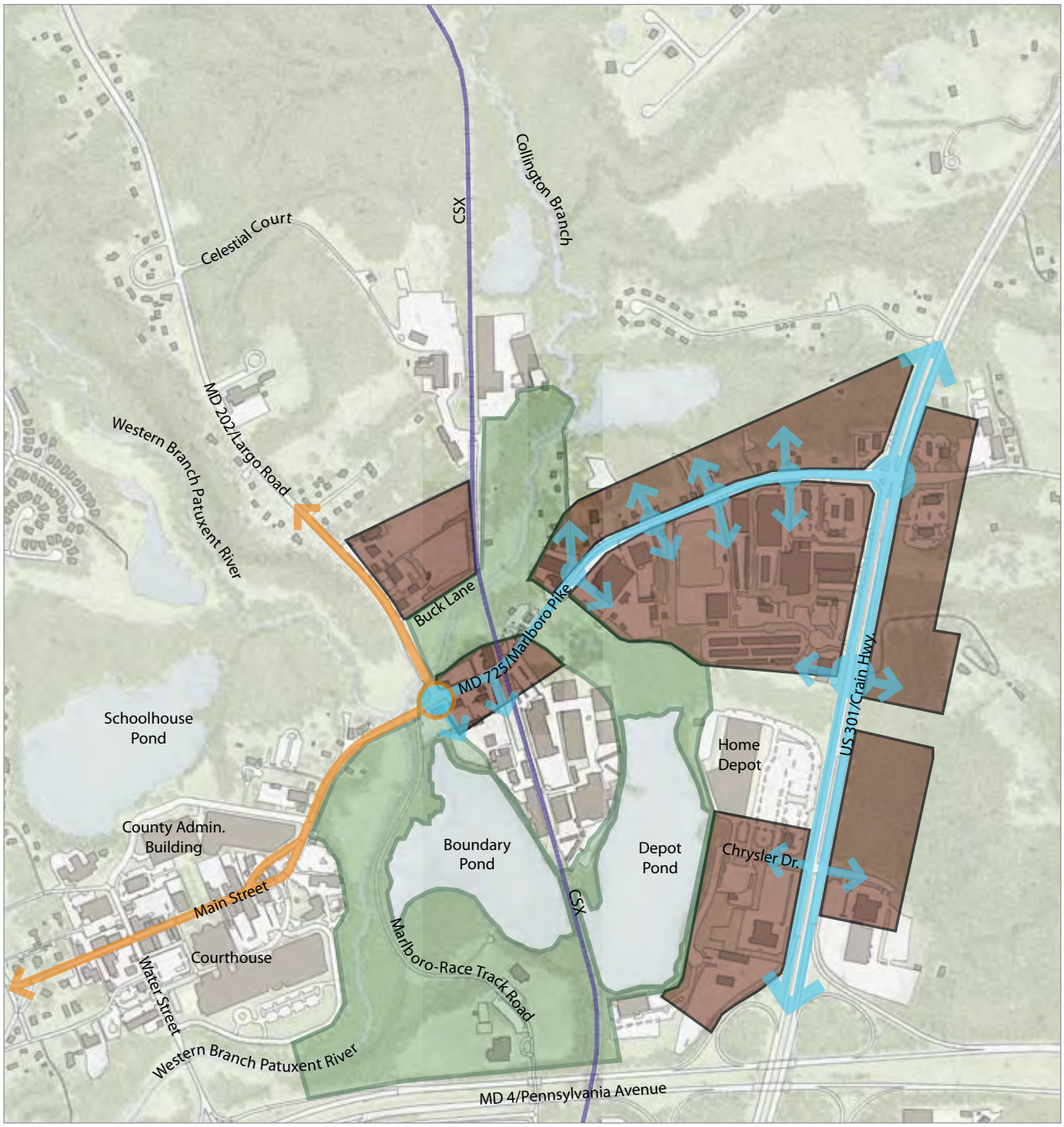
Photo 4.29 Roundabout, Missoula MT

Photo 4.30 Streetscape, Porltand, OR

Photo 4.31 Concrete Plant Park, Bronx River, Bronx, NY

Photo 4.32 Main Street, Ellicott City, MD

Map 4.7 Potential Redevelopment Area



KEY

- Potential Redevelopment Areas
- Potential Environmental and Open Space Improvement Areas
- Town Identity
- Business District Identity
- CSX Rail Line
- Study Area

Phase 1a (0-10 years)

The Phase 1a redevelopment strategy for the study area covers a 10-year period, with a primary focus on streetscape, environmental, and open space improvements. These improvements are centered around MD 725/Marlboro Pike and the two ponds, Boundary and Depot. These infrastructure and community amenity improvements may be undertaken by county, state, and federal agencies to address life-safety and stormwater management issues prior to and/or independent of private redevelopment. These improvements include:

1. Streetscape improvements focused primarily along MD 725/Marlboro Pike with additional improvements on MD 202/Largo Road and Buck Lane (see Section 4.2 on page 34 for details on streetscape improvements and components). In 2011, Buck Lane was paved in response to stakeholder input to improve the road surface for commercial vehicles.
2. Bridges are recommended to raise the roads out of the floodplain and prevent flooding of MD 725/Marlboro Pike and MD 202/Largo Road. (See Section 4.2 on page 34 for details on streetscape improvements and components).
3. Environmental improvements are focused on the enhancement of the natural area surrounding Depot and Boundary Ponds. In 2011, the U.S. Army Corps of Engineers (USACE) began wetland restoration of Western Branch Patuxtent River. Phase 1a includes a review of the future USACE County Flood Study, CTS 9698, planned for the area by 2015 and recommended assistance for relocation of businesses in flood-prone area.
4. A continuation of the trail system is planned around Depot and Boundary Ponds to connect to existing recreational fields as well as to the trail around Schoolhouse Pond. Passive and active recreation is indicated along this wooded trail system as well as at a community park located between MD 725/Main Street and Marlboro Race Track Road, south of the MD 202/ MD 725 intersection(see Section 4.3 on page 51 for details on environmental and open space improvements).

Photo 4.33 7th Street, Oregon City

Photo 4.34 Roundabout, Montpelier VT

Photo 4.35 Open space at Mill Race Park

Photo 4.36 Amphitheater at Mill Race Park

Map 4.8 Phase 1a (0-10 years): Streetscape and Open Space Improvements

Phase 1b (0-10 years)—Public and Private Improvements

The Phase 1b redevelopment strategy for the study area covers a 10-year period with a primary focus on infill and redevelopment of underutilized sites along MD 725/Marlboro Pike to strengthen the connection to the town core and improve the streetscape. Depending upon the speed of market recovery, some of this redevelopment may occur later in Phase 2 (11-20 years). Some redevelopment of these sites may require the demolition of existing buildings. Care should be taken to locate new buildings out of flood-prone and environmentally sensitive areas. New development and improvements include:

1. One- to three-story commercial infill redevelopment at the intersection of MD 725/ Marlboro Pike and MD202/Largo Road with surface parking located behind or to the side of each building. Redevelopment locations include north of MD 725 between MD 202 and the CSX rail line, and south of MD 725 between Marlboro Race Track Road and the CSX rail line.
2. Intersection improvements include a roundabout with landscape and signage at MD 725/Marlboro Pike and MD 202/Largo Road. The roundabout will be a gateway into the town core for visitors coming from the north along MD 202 and from the east, along Marlboro Pike.
3. A proposed north/south street connecting MD 725/Marlboro Pike to Peerless Avenue.
4. The redevelopment of the tobacco warehouse site with one- to three-story commercial buildings may occur earlier in Phase 1 as this site has been cleared and primed for redevelopment. Parking should be located behind the buildings away from MD 725.
5. Along with the redevelopment of the tobacco warehouse, new infrastructure improvements on this site include the extension of a proposed north/south street, providing access to properties south of Marlboro Pike and west of US 301 that currently have limited connectivity.
6. Two- and three-story commercial infill north of MD 725/Marlboro Pike between US 301 and the proposed north/south street connecting to Peerless Ave.

Photo 4.37 Commercial buildings, Berkeley, CA

Photo 4.38 Mixed-use buildings, Serenbe, GA

Map 4.9 Phase 1b (0-10 years): Redevelopment along MD 725/Marlboro Pike

Phase 2 (11-20 years)

The Phase 2 redevelopment strategy for the study area covers the next 10-year period, with a primary focus on continued infill and redevelopment of underutilized sites along MD 725/Marlboro Pike as well as redevelopment of the area surrounding the existing concrete plant south of the Home Depot. Some redevelopment of these sites may require the demolition of existing buildings. Care should be taken to locate new buildings out of flood-prone or environmentally sensitive areas. New development and improvements include:

1. One- to three-story commercial infill north of MD 725/Marlboro Pike between the CSX line and the proposed road connecting to Peerless Avenue. Surface parking should be located behind or to the side of new buildings.
2. One- to three-story commercial buildings along the proposed east/west street, connecting MD 725/Marlboro Pike and US 301.
3. A proposed east/west street connecting MD 725/Marlboro Pike to US 301.
4. Completion of the proposed north/south street, connecting south to the new proposed east/west street.
5. One- to three-story commercial redevelopment around the concrete plant south of Home Depot between Depot Pond and US 301. Redevelopment here may reflect the industrial character of the concrete plant, adding interest to the proposed trail and boardwalk system around Depot Pond.
6. Along with redevelopment, the creation of a park on the east side of Depot Pond with a promenade and programmed activities.
7. A recreational outfitter and/or facilities at the intersection of MD 202/Largo Road and Buck Lane, supporting recreation activities planned for the Phase 1a open space improvements along the Collington Branch Trail.

Photo 4.39 Mixed-use buildings, Serenbe, GA

Photo 4.40 Adaptive re-use development, Durham, NC

Photo 4.41 Concrete Plant Park, Bronx River, Bronx, NY-

Map 4.10 Phase 2 (11-20 years): Redevelopment along MD 725/Marlboro Pike and US 301

Phase 3 (20+ years)

The Phase 3 redevelopment strategy for the study area covers the long-term vision beyond 20 years with a primary focus on completing the redevelopment of the MD 725/Marlboro Pike corridor as well as additional development along MD 202/Largo Road (north of Buck Lane) and retail development along the east side of US 301. Some redevelopment of these sites may require the demolition of existing buildings. New development and improvements include:

1. A roundabout is proposed at the intersection of MD 725/Marlboro Pike and US 301. Alternatively, a revised intersection in lieu of a roundabout may be planned (see Figures 4.5 and 4.6 on page 38). In either case, the identity of the Town of Upper Marlboro and the Business District should be expressed.
2. One- to three-story commercial infill redevelopment surrounding the intersection of MD 725/Largo Road and US 301. Here, development would establish a new gateway to town and complete the redevelopment of the MD 725 Corridor.
3. One- to three-story mixed-use development along MD 202 north of Buck Lane would begin to establish a new, welcoming character as visitors approach the MD 725/MD 202 gateway to the town core from the north.
4. Highway retail development east of US 301 and south of the MD 725 intersection may follow the completion of the planned new US 301 alignment to MD 4.

Photo 4.42 Retail, Davidson, NC

Photo 4.43 Brier Creek Parkway commercial, Raleigh, NC

Map 4.11 Phase 43 (20+ years) Full buildout

5.0 IMPLEMENTATION

5.1 Marketing, Business Development, and Business Assistance

Specific strategies have been provided in Section 3 of this report for marketing, business development, and business assistance. Key actions for implementation of these strategies targeted at revitalization are described below, including those oriented toward areas located within the study area as well as those just outside of it within the town core/town center.

Areas within the Study Area

Establish Tax Abatement Program for a Compensatory Storage District (CSD)

Due to the issues relating to flooding throughout this planning area, a CSD approach has been recommended as a financing and management mechanism. To help leverage investment and redevelopment within this area, certain incentives have been recommended in the strategic portion of this study. Among these incentives is the creation of a tax abatement program that would help reduce the up-front tax burden on businesses and property developments within the study area. Since such incentives affect the property tax base, it is recommended that Prince George's County and the State of Maryland Real Property Division take a lead on assessing the need and viability of this incentive. The challenge may relate to the ability of the county to establish special districts outside of its normal policy guidelines and where the area (Greater Upper Marlboro) has not been prioritized for development by the county's EDC. Nevertheless, it is recommended that M-NCPPC engage with the county to initiate discussions on the prospect of this incentive beginning in early 2013.

Establish Targeted Low-Interest Capital Loan Program for the CSD District

Consistent with the theme of creating incentives to help leverage development in the CSD, the plan has recommended establishing a targeted low-interest capital loan program in this district. The loan program would be introduced and/or administered by EDC, which would develop collaborations with banks and the Small Business Administration (SBA) to establish a revolving capital loan program. The county, in concert with its partner banks and SBA, would seed the loan fund with $500,000 to finance capital projects. It is envisioned that discussions on collaboration for this loan fund would be initiated by fall 2013, with implementation in spring 2014.

Examine Audience Support Facility Potential

In addition to the open space amenities discussed in Section 4.3, Environmental and Open Space Improvements, there may be opportunities for other types of community-oriented venues within the study area, such as recreation or performance facilities. As recommended in this report for the open space amenities , the proposed locations of such facilities largely fall within the floodplain and, therefore, coordination with USACE's study to be completed by 2015 is essential. The specific need or desire for such facilities has not been determined but a recommendation has been made that EDC, in coordination with the Town of Upper Marlboro, embark on a study to examine such potentials. This assessment could be conducted in-house if the appropriate skills are available; otherwise, a $30,000 grant should be secured from the county (perhaps with matching funds from outside sources) to hire specialists to examine the potentials and the need (or desire) in the community for such an audience support venue.

Work with Property Owners to Encourage Development along US 301/Crain Highway

US 301 provides the best market opportunity and exposure for commercial development. As noted in the study, there is the need to work with property owners and ensure there is buy-in to concepts for commercial

and industrial redevelopment of the area on the west side of US 301. EDC, along with M-NCPPC and the Town of Upper Marlboro, would engage with the property owners on this question by early 2015.

Establish a Marketing and Recruitment Plan

Key strategic recommendations for marketing and business development have been provided as part of this planning effort. These broad strategies should be translated into a marketing and business recruitment plan that has buy-in from EDC, the Town of Upper Marlboro, and local businesses. EDC should lead this effort perhaps with up to $20,000 in seed funding from the county to initiate efforts. Again, a primary challenge may relate to the fact that the county has not prioritized this node for economic development. Therefore, marketing efforts will rely on gaining buy-in from EDC to the concept of further commercial or industrial development in this area.

Areas Outside of the Study Area

Work with Property Owners to Assemble Parcels for Housing Development North of MD 725/Marlboro Pike

While it has been determined that large-scale housing development is unlikely to occur within the study area, there is the opportunity and recommendation for a TND or other small-town-branded residential development north of MD 725/Marlboro Pike. The market analysis suggests that a housing development proximate to the existing Town of Upper Marlboro is necessary to help increase demand for retail uses and revitalization of Main Street within the town core. It is recommended that M-NCPPC work with the Town of Upper Marlboro on strategies to facilitate this development such as by working with property owners on a master plan, recruiting high-quality developers through an RFP process, and leveraging development through infrastructure improvements. This effort should be initiated by fall 2013.

Establish Main Street Organization to Include Businesses on MD 725

The plan has recommended that a main street organization be established in Upper Marlboro to extend to businesses along MD 725 toward US 301. The Town of Upper Marlboro would work with EDC and the National Trust for Historic Preservation (NTHP) to establish a main street program in the town. NTHP would help fund this effort, which should begin by fall 2012 or spring 2013.

Initiate Heritage Marketing Program for Upper Marlboro

The plan also recommends a heritage marketing program for Main Street and the Town of Upper Marlboro to help build market support and destination traffic for businesses along MD 725. This effort would be led by the main street program, once established, with a target of $25,000 in grant funding from NTHP.

5.2 Environmental

Strategies to strengthen the environmental assets of the area and at the same time help alleviate the intensity of flood events are provided to guide the redevelopment of the area. Improving the ponds and Western Branch to function better during periods of heavy rain will be an asset to the larger community. The following steps should be taken to further this concept: 1) flood zone mitigation: complete the flood study of the system headed by the Army Corps of Engineers (CTS 9698); 2) develop a flood zone mitigation/infrastructure investment plan based on the findings of CTS 9698; 3) define/create a compensatory floodwater storage district; 4) examine feasibility of passive recreation in the floodplain along the Western Branch at the base of Governor Oden Bowie drive.

5.3 Infrastructure Improvements

Key recommendations regarding road alignments need further study and coordination between the county and SHA. These include evaluating the feasibility of the proposed relocations of MD 202 and US 301 and developing a phased streetscape improvement plan for MD 725/Marlboro Pike

6.0 APPENDIX

6.1 Market Analysis Introduction

Purpose

This report provides a summary of findings from a market analysis of the Greater Upper Marlboro study area, on behalf of M-NCPPC in Prince George's County. The market analyses were conducted based on site reconnaissance and analysis, interviews with existing businesses in the area, interviews with real estate brokers, document reviews, economic trends and projections, existing real estate conditions, demand forecasts, competitive framework assessment, and potentials modeling. A survey of businesses was completed and meetings were held with the business base in 2011. Based on the market analysis findings, strategic recommendations are made for marketing and development of the study area discussed in Section 3.0. (See Section 3.0 on page 23)

Location, Access, and Exposure

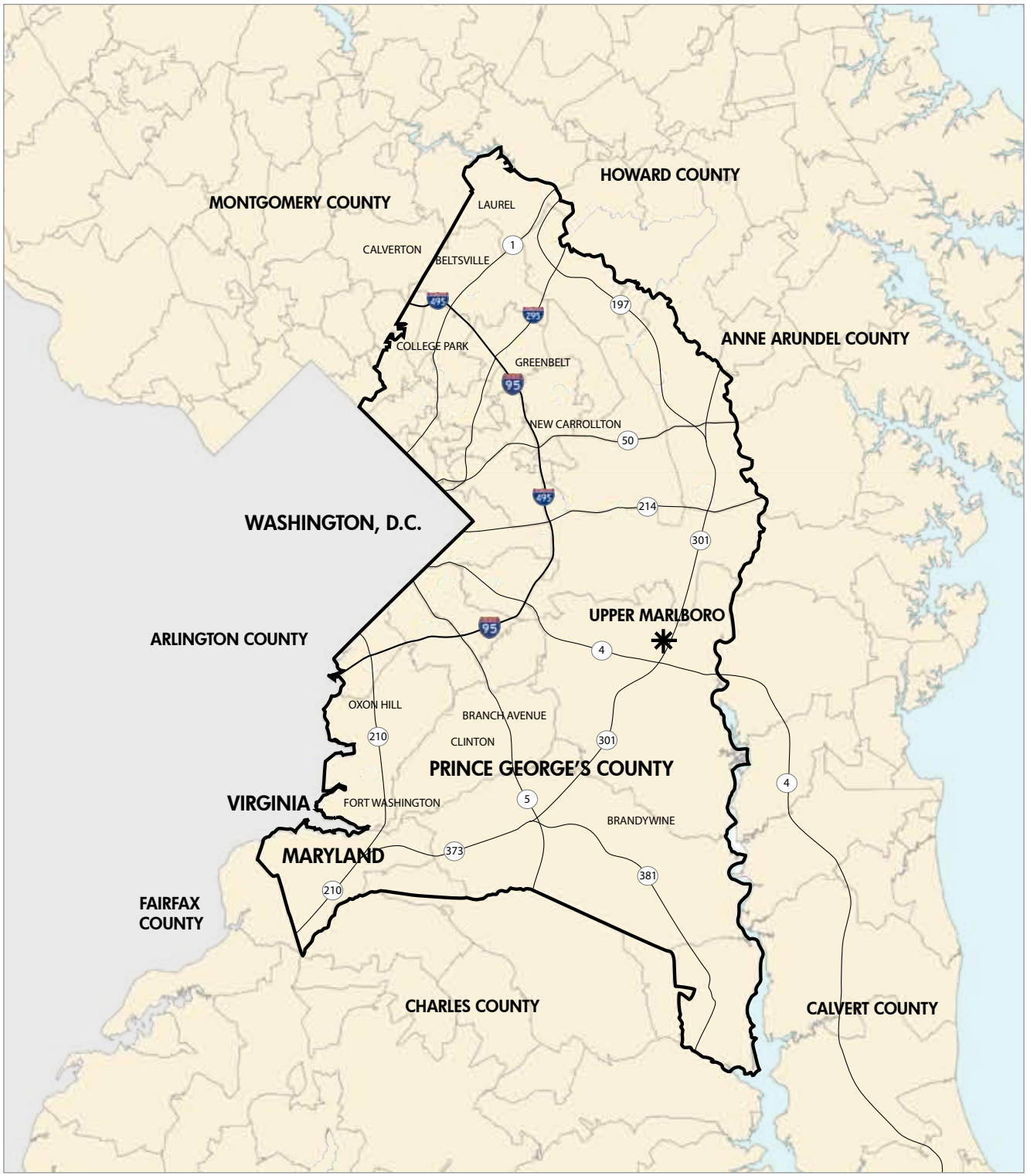
The study area is located adjacent to the Town of Upper Marlboro, seat of the Prince George's County Government. This area is located approximately 15 minutes from the Beltway and about 30 minutes from downtown Washington, D.C. The study area has excellent transport access and is located on the northwest quadrant of an intersection of regional significance, US 301, and MD 4. US 301/Crain Highway provides access north toward Baltimore and south into Virginia, thereby bypassing Beltway traffic. MD 4 (world-famous Pennsylvania Avenue in Washington, D.C.) is an important commuter route south and east to Calvert County. MD 725/Marlboro Pike connects the study area to the Town of Upper Marlboro. MD 202/Largo Road connects the study area north to Largo, and US 301 connects to US 50 in Bowie, the primary east-west corridor between Washington, D.C., and Annapolis. The study area has excellent exposure to US 301, MD 4, and MD 725.

A CSX rail line also traverses the study area. While this line may have served the needs of lumber yards and tobacco warehouses in the past, few businesses in this area use the rail line today. Many of the existing businesses located in this area take advantage of the road network and access to homes and labor force. The location is perceived to be particularly competitive for attracting skilled workers from nearby Calvert County.

Existing Inventory

At present the study area is largely built out with a total of approximately 800,000 square feet of existing building use. The study area includes a mix of retail (25 percent), industrial (31 percent), office (21 percent), and civic (5 percent—community organizations and government offices) space, although the physical character of the study area is decidedly industrial. (See Figure 6.1 below.) As noted above, the area was originally developed for Upper Marlboro's industries, including tobacco warehousing and lumber yards, due to its excellent access along rail and highways.

Map 6.1 Prince George's County Locator Map



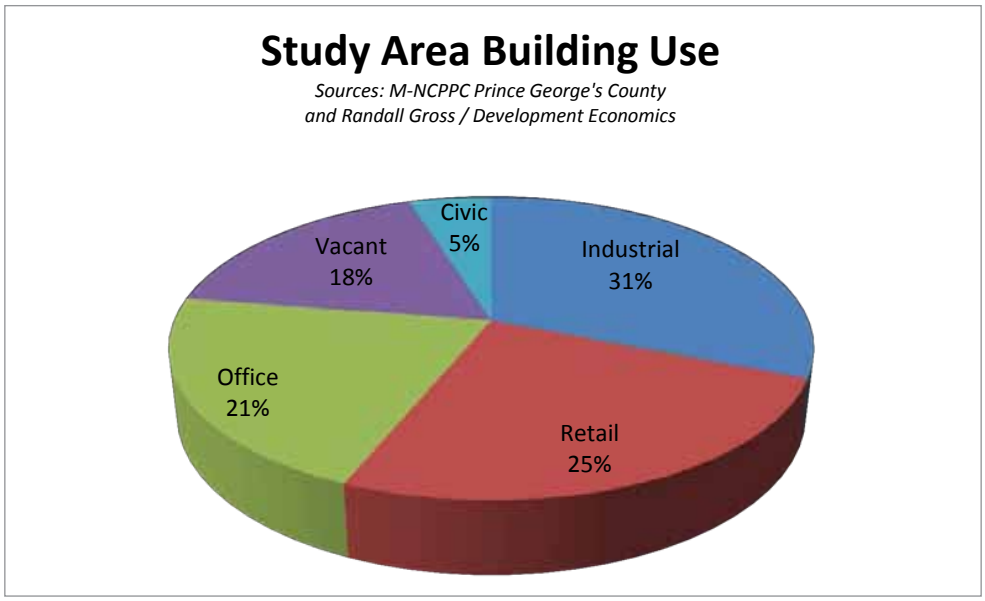


Figure 6.1 Study Area Building Use Chart, 2010

Even today, the study area is still attracting similar lumber, warehousing, and transportation/distribution-oriented uses. The primary retail use is a new Home Depot (lumber and hardware) store with frontage on US 301. Most of the other retail businesses are serving a highway-oriented market along US 301 and MD 4. Along with highway-oriented retail, there are a number of auto service businesses and salvage yards located in the study area. Several of the industrial and service uses are (like Home Depot) also oriented to lumber and building/supply. These businesses supply pools, insulation, concrete, appliances, security services, and furniture, or are engaged in homebuilding, storage, and related services for a regional market base. Thus overall, the economic mix in this area is still oriented to building/supply and transportation because of the area's accessibility and transportation infrastructure. A more detailed discussion of existing uses is provided in the market analyses.

About 18 percent of the building space is currently vacant. This vacant space is concentrated in a commercial building that formerly served as an automobile dealership on the west side of US 301. Vacant land (the site of a former tobacco warehouse) is also available along MD 725 adjacent to industrial uses.

Physical Conditions

There are serious physical constraints to the study area's development. Not the least of these constraints is the fact that the study area is largely built out (and could therefore require significant relocation of existing businesses and redevelopment of existing building sites in order to support new construction). There are only two available vacant sites at present, including the car dealership. The area retains a largely industrial character, with auto salvage yards, the concrete plant, and older warehouse buildings. As such, development of residential, professional, and consumer-oriented commercial uses is likely to require significant redevelopment and upgrading of streetscape, buildings, and infrastructure throughout parts of the study area in order to create an attractive environment for marketing these uses.

Based on FIRM, a large portion of the study area is located within the 100-year floodplain. (See Map 2.2 on page 12.) This being the case, new development within these areas is subject to the Prince George's County Floodplain Ordinance, 1989 (amended 1993, 2011), requiring new structures to have a finished FFE of at least one foot above the regulated 100-year flood elevation, which could add to the overall cost of construction. Such

costs would have a deleterious impact on the market demand for various uses in the study area, because higher overall development costs could translate into higher prices for end product, which may not be as competitive in the market. These cost impacts are likely to be magnified in the short term, due to price sensitivity and financing challenges currently facing development in the region. The market analyses conducted for this study assume normal development costs that would translate into competitive land, building prices, and leasing rates. Any additional costs would need to be translated to temper the market findings.

There are two relatively large ponds located in the central portions of the study area, Depot Pond and Boundary Pond. These water resources constrain development and hamper access but also act as potential amenities for surrounding land. At present, the land around the ponds is generally undervalued due to the imposition of adjacent industrial uses for which the wetlands generate little added value. Without these uses, the ponds and surrounding wooded paths can offer an attractive setting for recreation, housing, office, and other more sensitive development. There is an existing community recreation center located not far from these ponds, suggesting opportunities for a more comprehensive recreation component.

Marketing Constraints

The study area covers only one quadrant of a "100 percent intersection" and, thus, only represents 25 percent of the overall market opportunity. This issue drives the question of overall potentials, since any policy that restricts development east of US 301 will impact on the marketability of this particular site as well. There is an inherent difficulty in segregating the site from the overall market for land surrounding this interchange. Other marketing issues noted previously include the industrial character of the study area (in marketing for residential, especially), and the costs that flood regulations may impose on new development.

Overall Marketability

Key observations regarding the study area's marketability for various uses are summarized below:

- **Industrial:** The study area offers inherent existing strengths for industrial use, especially distribution, because of its access to a regional transportation network. The current market perceives this study area as an industrial/service location.
- **Office:** There is strong competition from Bowie and emerging nodes for office uses, but US 301 does provide good access to residential and business base north and south of the site. Key constraints include the lack of existing office/business nodes in the area and the lack of large residential base in support of commercial office business uses. Untapped opportunities exist for creating a business node in this part of the county, but there is little base on which to build. As such, the risk profile is much higher than in areas further north and west.
- **Retail:** The study area has a rural/commuter retail character but offers destination opportunities due to access from US 301. The market will be somewhat dependent on households to the east and south. If development on-site is too constrained, then the market will be highway-oriented "strip" commercial. There may be other opportunities that would build on the heritage of the Town of Upper Marlboro and utilize existing buildings with historic industrial character.
- **Residential:** The study area presents a good commuter location for those who work in county government (which is the primary residential driver), as well as those who work in northern Prince George's County, Silver Spring, and Bethesda. There may be lifestyle opportunities if the town center's heritage is used as a marketing tool.

- **Other:** An opportunity exists for destination-related uses and Show Place Arena-oriented visitor services such as a hotel, although the market analysis does not extend fully to this use. Again, the location is appropriate for this use so long as an amenity-oriented environment is created to support it.

6.2 Economic Overview

A detailed economic assessment was conducted to place the site within the context of economic trends and growth within the region and Prince George's County. The analysis focused on employment trends, economic sectors, and key economic drivers within the county as well as within the area surrounding the study area. Basic demographic trends were also analyzed, although a much more detailed demographic assessment is included in the retail market analysis. Key findings through 2008 are summarized below, based on the data available at the writing of this report.

Employment & Economic Sectors

The Washington Metro region has a government and services-oriented economic base. The region has seen growth in administrative support, professional and technical, accommodation, and health care services since 1998. (Table 1 on page 79) Since the recession, the construction and transportation warehousing sectors have had a decline in employment.

Table 1. AT-PLACE EMPLOYMENT TRENDS, WASHINGTON, D.C., MSA, 1998–2008

Industry	1998	2000	2003	2008	1998-2008 Number	Percent
Agriculture	*449*	*449*	*376*	450	1	0.10%
Mining	1,505	1,416	1,120	957	(548)	-36.40%
Utilities	9,984	9,640	8,717	8,375	(1,609)	-16.10%
Construction	129,142	149,543	153,641	166,435	37,293	28.90%
Manufacturing	***89,999***	**77,234**	***75,374***	**58,753**	**(31,246)**	**-34.70%**
Wholesale	*75,000*	70,069	*75,374*	68,319	(6,681)	-8.90%
Retail	244,377	254,929	257,024	270,381	26,004	10.60%
Transport/ Warehouse	*44,999*	*44,999*	*75,374*	52,249	7,250	16.10%
Information	***120,000***	***120,000***	***100,500***	**107,114**	**(12,886)**	**-10.70%**
Finance/Insurance	***89,999***	***120,000***	***100,500***	**106,603**	**16,604**	**18.40%**
Real Estate	49,822	50,133	*75,374*	56,581	6,759	13.60%
Prof/Tech Services	333,063	368,595	379,815	486,560	153,497	46.10%
Management Svcs	43,097	*44,999*	*37,687*	46,540	3,443	8.00%
Admin Support	***120,000***	**214,839**	**187,556**	**233,090**	**113,090**	**94.20%**
Education	*89,999*	69,684	*75,374*	87,189	(2,810)	-3.10%
Health Care	212,544	218,709	244,739	267,773	55,229	26.00%
Arts/Entertainment	*44,999*	*44,999*	34,024	40,770	(4,229)	-9.40%
Accommodation/ Food	174,678	185,314	194,896	227,772	53,094	30.40%

Other Services	154,445	166,457	168,373	183,981	29,536	19.10%
Unclassified/Aux.	*27,352*	15,883	*794*	*328*	(27,024)	-98.80%
TOTAL 1/	2,055,459	2,227,894	2,246,636	2,470,220	414,761	20.20%
Notes: Numbers in Italic are estimates based on Census averages. 1/ Actual Census totals (which do not necessarily represent the total of column numbers. Unclassified/Auxiliary definition changed during period.						
Sources: U.S. Census Bureau and Randall Gross/Development Economics.						

Regional employment in manufacturing, utilities, information services, education, and arts and entertainment has fallen over the same period. Overall, the region's employment has increased by more than 20 percent between 1998 and 2008 (prior to the onset of the national recession).

Prince George's County has a diverse economic base, with no concentration in any one sector. The largest employers are retail trade, construction, health care, administrative services, accommodation, and professional and technical services. Employment in Prince George's County increased by about seven percent between 1998 and 2008. Growing sectors included arts and entertainment, education, administrative support, health care, real estate, and construction. Meanwhile, the county saw declining employment in manufacturing, finance, information, and management services. While manufacturing and wholesale employment fell in Prince George's County, the county has an increasing share of the region's employment in these industries as well as in transportation. (See Table 2 below.)

Table 2. AT-PLACE EMPLOYMENT TRENDS, PRINCE GEORGE'S COUNTY, 1998-2008

Industry	1998	2000	2003	2008	1998-2008 Change Number	Percent
Agriculture	13	9	55	14	1	6.60%
Mining	272	348	161	76	(196)	-72.10%
Utilities	1,031	697	690	720	(311)	-30.20%
Construction	27,683	30,100	31,734	34,760	7077	25.60%
Manufacturing	12,116	10,697	10,535	9,000	(3116)	-25.70%
Wholesale	14,284	14,537	20,455	15,201	917	6.40%
Retail	37,864	38,541	38,802	38,152	288	0.80%
Transport/Whse	8,467	10,214	8,040	10,128	1661	19.60%
Information	8,304	9,690	9,796	7,446	(858)	-10.30%
Finance/Insurance	9,091	8,864	8,573	7,018	(2073)	-22.80%
Real Estate	5,015	5,357	6,048	6,319	1304	26.00%
Prof/Tech Services	24,701	23,715	27,963	24,651	(50)	-0.20%
Management Svcs	7,770	6,889	4,807	2,941	(4829)	-62.10%
Admin Support	22,526	25,083	19,569	29,212	6686	29.70%
Education	2,793	3,410	3,633	4,294	1501	53.70%
Health Care	22,222	22,228	25,830	28,085	5863	26.40%
Arts/Entertain	2,920	2,779	3,450	4,567	1647	56.40%
Accommodatn/Food	19,729	19,380	20,546	22,471	2742	13.90%
Other Services	15,262	16,508	15,378	14,460	(802)	-5.30%
Unclassified/Aux.	1,064	1,648	57	15	(1050)	-98.60%
TOTAL 1/	243,126	250,694	256,121	259,530	16404	6.70%

Notes: Numbers in Italic are estimates based on Census averages. 1/ Actual Census totals (which do not necessarily represent the total of column numbers. Unclassified/Auxiliary definition changed during period.

Sources: U.S. Census Bureau and Randall Gross/Development Economics.

The components of the Prince George's economic base are summarized by industry sector. As noted previously, the county has a relatively diverse economic base, dominated by retail, construction, health care, administrative services, accommodation, and professional services. (See Figure 6.2 below.)

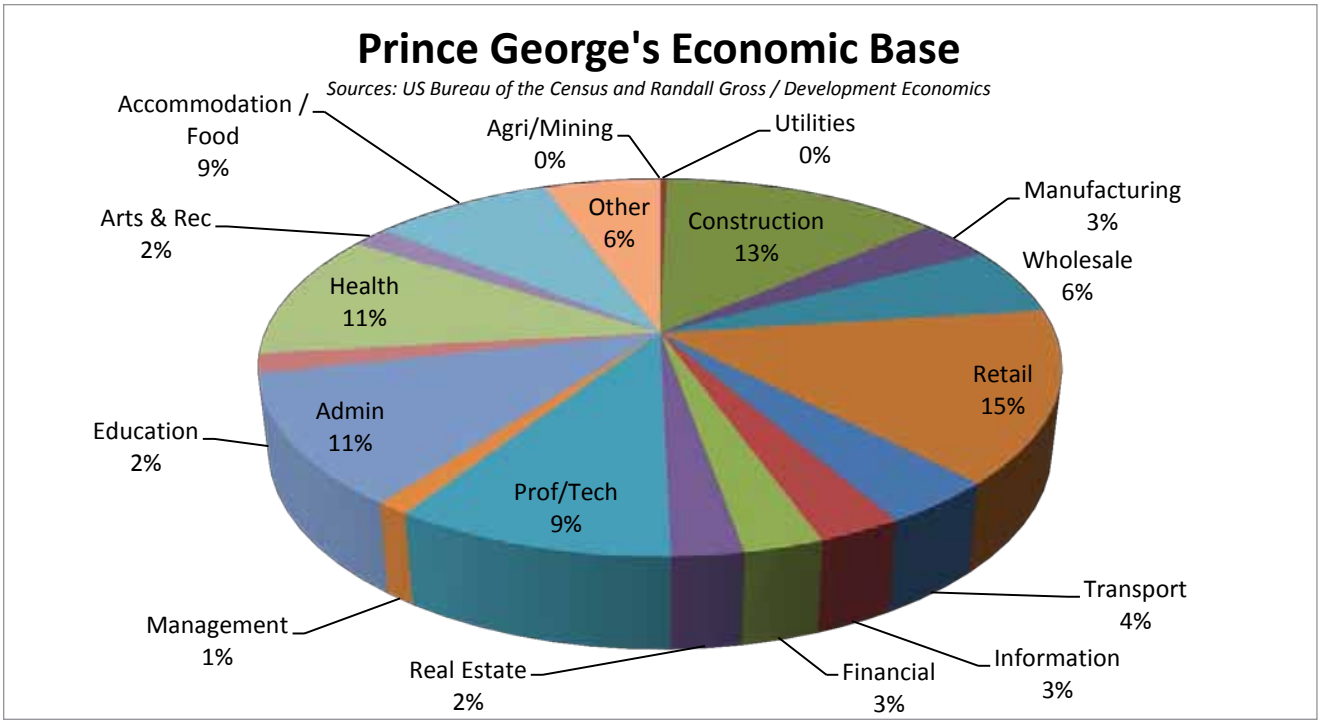


Figure 6.2 Prince George's County Economic Base Chart, 2008

An employment share analysis was conducted to assess the county's share of the regional economic base, its concentrations within specific industries, and the change in those industries between 1998 and 2008. (See Table 3 on page 83.) Overall, the county's share of regional employment fell from 11.8 percent to 10.5 percent over the 10-year period. The greatest decrease was felt in management services, followed by mining, finance and insurance, administrative support, and professional and technical services. At the same time, the county saw its share of the regional increase in the industrial sectors: manufacturing (from 13.5 percent to 15.3 percent), wholesale trade (19.0 percent to 22.3 percent), and transport and warehousing (18.8 percent to 19.4 percent). The county's share of arts, entertainment, and recreation services; education; and real estate employment also increased markedly over the period.

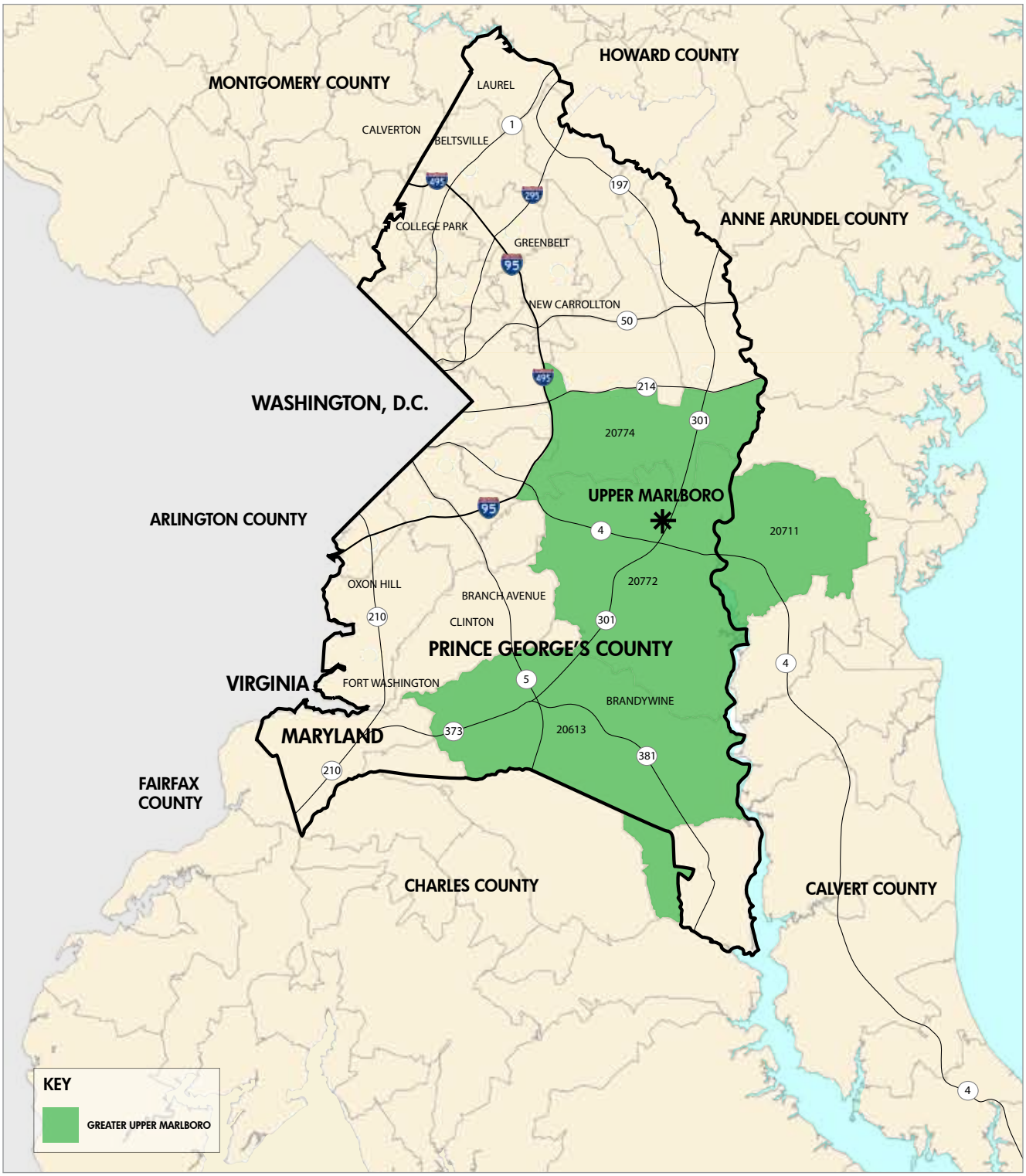
By 2008, Prince George's County had relatively high concentrations of employment in wholesale trade (22.3 percent versus the region's overall share of 10.5 percent), construction (20.9 percent), transport and warehousing (19.4 percent), and manufacturing (15.3 percent). Thus, Prince George's County has a concentration of the region's industrial employment. Such concentrations suggest that the county has a competitive advantage over other parts of the Washington region for those uses, due to available low-cost land, comparatively low operating costs, relatively good regional access, lower average labor costs, and other factors.

Table 3. EMPLOYMENT SHARE ANALYSIS, PRINCE GEORGE'S COUNTY, 1998-2008			
Industry	**1998**	**2008**	**Change**
Agriculture	2.90%	3.10%	6.40%
Mining	18.10%	7.90%	-56.10%
Utilities	10.30%	8.60%	-16.80%
Construction	21.40%	20.90%	-2.60%
Manufacturing	13.50%	15.30%	13.80%
Wholesale	19.00%	22.30%	16.80%
Retail	15.50%	14.10%	-8.90%
Transport/Warehouse	18.80%	19.40%	3.00%
Information	6.90%	7.00%	0.50%
Finance/Insurance	10.10%	6.60%	-34.80%
Real Estate	10.10%	11.20%	11.00%
Prof/Tech Services	7.40%	5.10%	-31.70%
Management Svcs	18.00%	6.30%	-64.90%
Admin Support	18.80%	12.50%	-33.20%
Education	3.10%	4.90%	58.70%
Health Care	10.50%	10.50%	0.30%
Arts/Entertainment	6.50%	11.20%	72.60%
Accommodation/Food	11.30%	9.90%	-12.70%
Other Services	9.90%	7.90%	-20.50%
Unclassified/Aux.	3.90%	4.40%	13.60%
TOTAL	11.80%	10.50%	-11.20%

Sources: U.S. Census Bureau and Randall Gross/Development Economics.

Upper Marlboro Area. The section surrounding the study area, including zip codes 20774, 20772, 20711, 20613, (see Map 6.2 on page 84) also has a diverse economic base, with a similar mix of retail, construction, administrative services, health care. and accommodation. However, the area has a slightly higher proportion of wholesale trade and distribution activities than the county as a whole. (See Figure 6.3 on page 85.)

Map 6.2 Greater Upper Marlboro Area Map



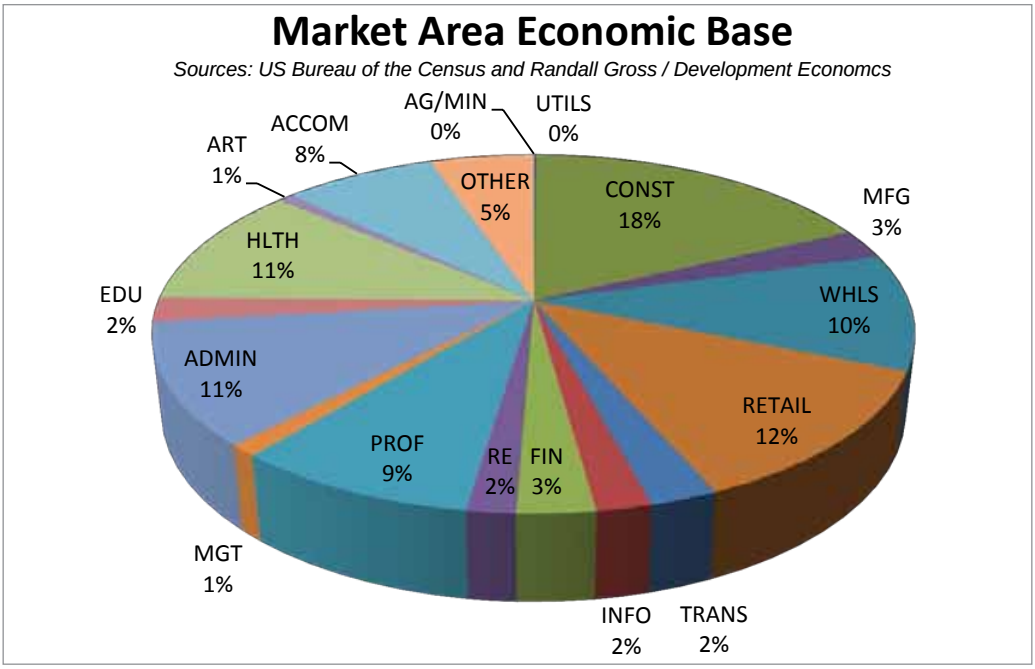


Figure 6.3 Market Area Economic Base Chart, 2008

The area saw employment increase by 37.6 percent between 1998 and 2008. While the area accounted for only about 8 percent of the county's employment base in 1998, it captured 11 percent by 2008. Total employment in this area was about 20,100 in 1998, increasing to 27,600 by 2008. Most of this employment is concentrated in zip codes 20772 and 20774 (Upper Marlboro). (See Table 4 below.)

Table 4. AT-PLACE EMPLOYMENT TRENDS BY SELECTED ZIP CODE PRINCE GEORGE'S COUNTY, 1998–2008

Zip Code	1998	2008	1998-2008 Change Number	Percent
20613	1,342	1,371	29	2.20
20711	680	1,022	342	50.30
20772	11,478	10,752	(726)	-6.30
20774	6,582	14,491	7909	120.20
TOTAL	20,082	27,636	7554	37.60
Share of Prince George's County	8.30%	10.60%	0	28.90
Share of Marlboro Study Area	0.98%	1.12%	0	14.50

Sources: U.S. Census Bureau and Randall Gross/Development Economics

Demographics

The region's population and household base has increased faster than expected, based on forecasts made by the Metropolitan Washington Council of Governments (MWCOG). MWCOG forecasted growth of 1.6 percent per year between 2005 and 2010, but the region has actually added population at the rate of about 2.0 percent per year. On the other hand, Prince George's County has grown slower than expected, with MWCOG forecasting population growth of 0.9 percent versus actual growth of 0.7 percent per year. Either way, the county's growth rate has fallen far below that of the region as a whole.

Table 5. HOUSEHOLD TRENDS AND FORECASTS 2005-2040, WASHINGTON REGION

Area	2005	2010	2015	2020	2025	2030	2035	2040
PGC	347,301	362,286	378,753	398,536	423,729	454,207	488,196	523,492
DC	750,260	788,162	815,160	860,915	895,073	922,419	931,585	959,225
ALL	3,785,481	4,079,664	4,406,127	4,740,041	5,024,875	5,272,307	5,465,817	5,656,744
PGC Share	**9.20%**	**8.90%**	**8.60%**	**8.40%**	**8.40%**	**8.60%**	**8.90%**	**9.30%**

Sources: Metropolitan Washington Council of Governments and Randall Gross/Development Economics.

Although Prince George's County is among the most affluent jurisdictions in the nation, household incomes are lower than average for the region and especially in comparison with neighboring Montgomery County. Despite its affluence, retailers and other businesses that seek locations in the Metro Washington market often overlook Prince George's County due to its relative positioning in the region. The Prince George's County Government has been trying to overcome this constraint through more proactive marketing and retail recruitment.

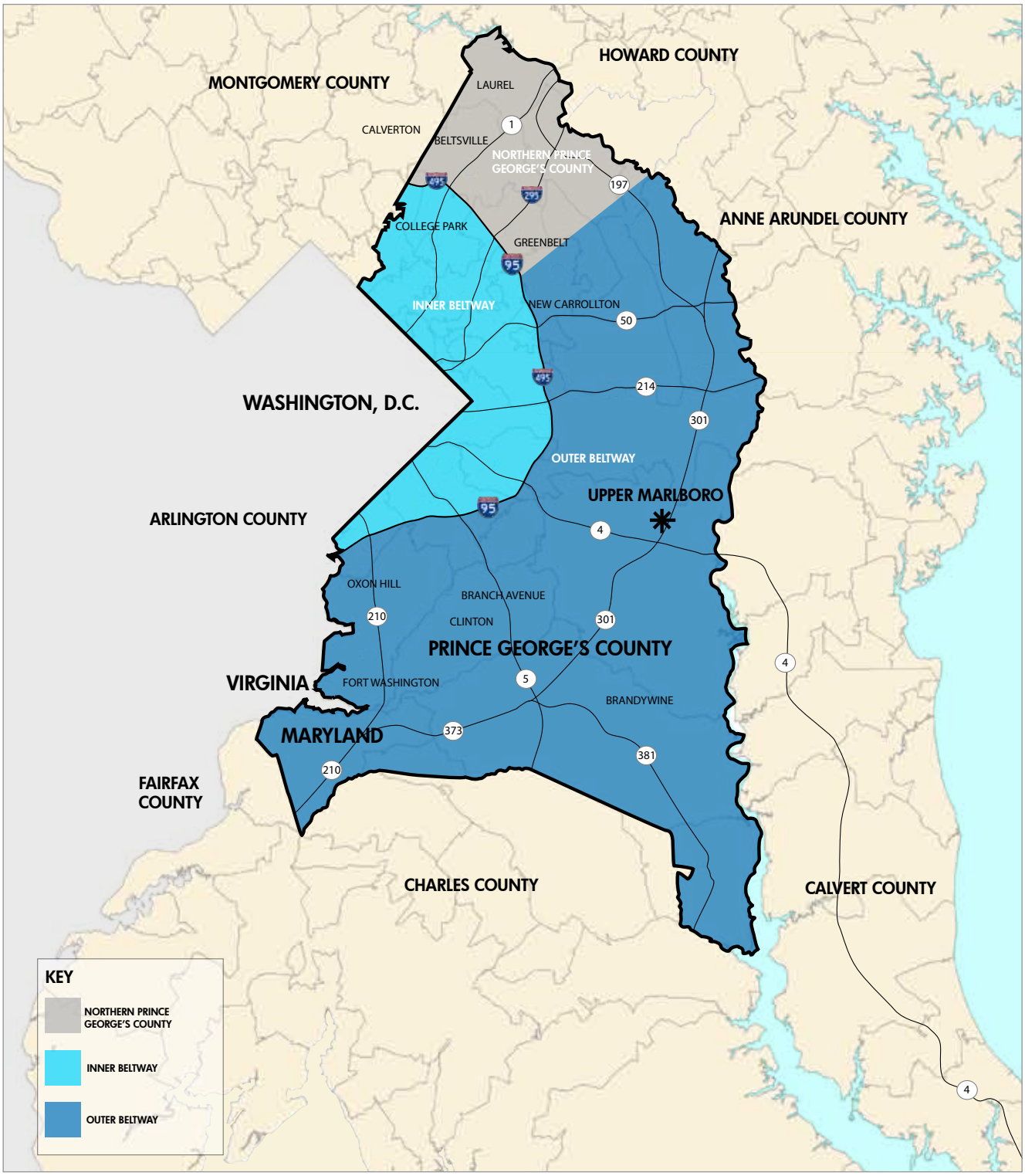
Summary

Prince George's County is a growing community with one of the most affluent populations in the country. The local economy is very diverse, although there are relatively high shares of employment in retail, construction, and health care. The county has a concentration in industrial employment, including manufacturing, warehousing and transport, construction, and wholesale trade when compared with the region as a whole. This suggests some competitive advantages in Prince George's County over other jurisdictions for this type of economic activity. The area surrounding the study area has a similar diverse mix of economic activities and is growing as a share of the county's overall employment. The study area itself, like Prince George's County, has a concentration of warehousing and distribution, wholesale, construction, and building supply activities due largely to its historically strong transportation access and infrastructure.

6.3 Office and Industrial Market Analyses

Key findings on the market potential for office and industrial space in the study area are summarized in this section. These findings result from a baseline market analysis, including a review of existing market conditions and trends and forecasts of future demand within the market area. The findings build on results from the *Prince George's County Industrial Land Needs and Employment Study* ("Land Needs Study"), completed for M-NCPPC and Prince George's County by the University of Maryland in 2010. Development potential was determined by examining the site capture of the market within the competitive context. Industrial market findings are presented first below, followed by the findings for the office market.

Map 6.3 Industrial Submarkets Map



Industrial Market

A significant share of the existing economic use within the study area is in industrial activities. Further, this area has long served as the industrial node for Upper Marlboro. Much of the building space in the area has been purpose-built from an early age for agricultural and industrial uses. For example, early buildings included tobacco storage warehouses. Today, many of the buildings support industrial suppliers who distribute largely north and south along the US 301 Corridor. As a result, there is a natural market that already exists at this location for industrial uses. A key question in the analysis was the scale and type of potential new industrial development that would be supported in the future at this location.

Industrial Market Area Definition

The study area forms part of the Baltimore-Washington Corridor industrial market, comprising Anne Arundel County, Howard County, and Prince George's County. Within this market area, the study area falls in the southern Prince George's County portion of the Outer Beltway submarket. (See Map 6.3 on page 87.)

Existing Market Conditions and Trends

Prince George's County's industrial supply has increased from 48.7 million square feet in 2003 to almost 55.5 million square feet by 2009 based on data generated by brokerage firms, including NAI/KNLB, consistent with information from CoStar presented in the 2010 Land Needs Study. This represents an increase of 6.8 million square feet or 13.7 percent over the seven-year period. The largest share of Prince George's space is in flex industrial, representing 35.9 percent of all industrial space in the county. However, flex represented the smallest portion of industrial space in 2003 at only 23 percent. The flex format is the fastest growing in the county and reflects the shift from heavy and light manufacturing to smaller supply, tech, and distribution companies.

The Outer Beltway submarket of Prince George's County includes the Greater Upper Marlboro area, Bowie/MD 50, and other areas of the county outside of the Capital Beltway and south of Greenbelt. This area has approximately 9.3 million square feet of industrial space representing 16.7 percent of the county's market. The Bowie/MD 50 area represents by far the largest industrial node in this submarket, with 8.5 million square feet or about 90 percent of the submarket inventory. This submarket is expanding more rapidly than areas inside the beltway, which are largely built out for industrial space. In 2003, the Outer Beltway submarket represented only 5.7 percent of the Prince George's market base, although the survey data from that period may have been less comprehensive than it is now. Nevertheless, the outer Beltway has captured a growing share of Prince George's County's industrial activity. Compared with the county as a whole, this area is much more oriented to bulk warehouse thanks to the availability of land for larger buildings and the access provided by highways like US 301 and MD 50. Flex represents the second largest segment with only 1.0 million square feet in office/warehouse space. (See Table 6 on page 89.)

Table 6. INDUSTRIAL INVENTORY TRENDS, PRINCE GEORGE'S COUNTY AND OUTER BELTWAY, 2003-2009							
Area/Type	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Prince George's County							
Bulk	N/A	15,072,546	16,558,384	18,203,120	18,424,929	17,756,971	17,871,980
O/W	N/A	23,613,655	24,320,127	17,020,382	17,398,971	17,450,551	17,654,307
Flex	N/A	11,555,618	10,866,440	19,527,712	19,823,304	20,197,853	19,918,920
TOTAL	48,738,688	50,241,820	51,744,951	54,751,214	55,647,204	55,405,375	55,445,207
Outer Beltway							
Bulk	N/A	N/A	N/A	323,550	4,234,149	4,400,903	4,416,074
O/W	N/A	N/A	N/A	508,397	973,205	991,809	1,006,980
Flex	N/A	N/A	N/A	2,106,712	3,471,665	3,780,895	3,838,446
TOTAL	2,775,808	2,857,234	2,897,946	2,938,659	8,679,019	9,173,607	9,261,500
Notes: N/A means Not Available. Comprehensive survey data of Outer Beltway available 2007.							
Sources: NAI/KNLB and Randall Gross / Development Economics.							

Vacancy. Prince George's County's industrial vacancy rates have generally increased since 2003, from about 12.3 percent to 16.6 percent in 2009. Office/warehouse space has experienced higher vacancies, peaking at 18.8 percent in 2006 and again at 18.4 percent in 2009. Flex space has the lowest vacancy rate, at 14.7 percent in 2009, with a low of only 8.1percent in 2007. In general, recent declining industrial occupancy is consistent with national trends during the recessionary period starting in 2008. (See Table 7 below.)

Table 7. INDUSTRIAL VACANCY TRENDS, PRINCE GEORGE'S COUNTY & OUTER BELTWAY 2003-2009							
Area/Type	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Prince George's County							
Bulk	N/A	N/A	12.00%	13.50%	13.50%	15.40%	16.90%
O/W	N/A	N/A	11.00%	18.80%	15.00%	16.30%	18.40%
Flex	N/A	N/A	16.00%	10.00%	8.10%	12.90%	14.70%
TOTAL	12.30%	14.80%	12.40%	13.90%	12.00%	14.80%	16.60%
Outer Beltway							
Bulk	N/A	N/A	N/A	15.80%	13.60%	20.90%	10.90%
O/W	N/A	N/A	N/A	17.40%	8.60%	4.80%	16.40%
Flex	N/A	N/A	N/A	15.70%	8.30%	15.60%	18.60%
TOTAL	N/A	N/A	N/A	16.00%	10.90%	17.00%	14.70%
Notes: N/A means Not Available. Comprehensive survey data of Outer Beltway available 2007.							
Sources: NAI/KNLB and Randall Gross/Development Economics.							

Outer Beltway submarket vacancy has sometimes exceeded that of the county as a whole, perhaps because a single, large, vacant, bulk warehouse can skew the occupancy for the overall submarket. On the other hand, outer Beltway vacancies bettered those in the county as a whole in 2009, at 14.7 percent, after peaking at 17.0 percent in 2008.

Rents. Prince George's County's industrial rents were averaging $5.84 for office/warehouse, $6.11 for bulk warehouse, and $6.85 for flex space. Within the outer Beltway submarket, industrial rents averaged $7.56 for office/warehouse, $5.56 for bulk warehouse, and $9.37 for flex space. Rents were therefore generally higher than the countywide average for flex and office/warehouse (which includes a higher mix of office fit-out) but lower for bulk space (which is oriented more to pure warehouse or light manufacturing space). Again, the rents may reflect the lower land costs for bulk space in the more rural areas but are more likely representative of a newer building stock in those areas.

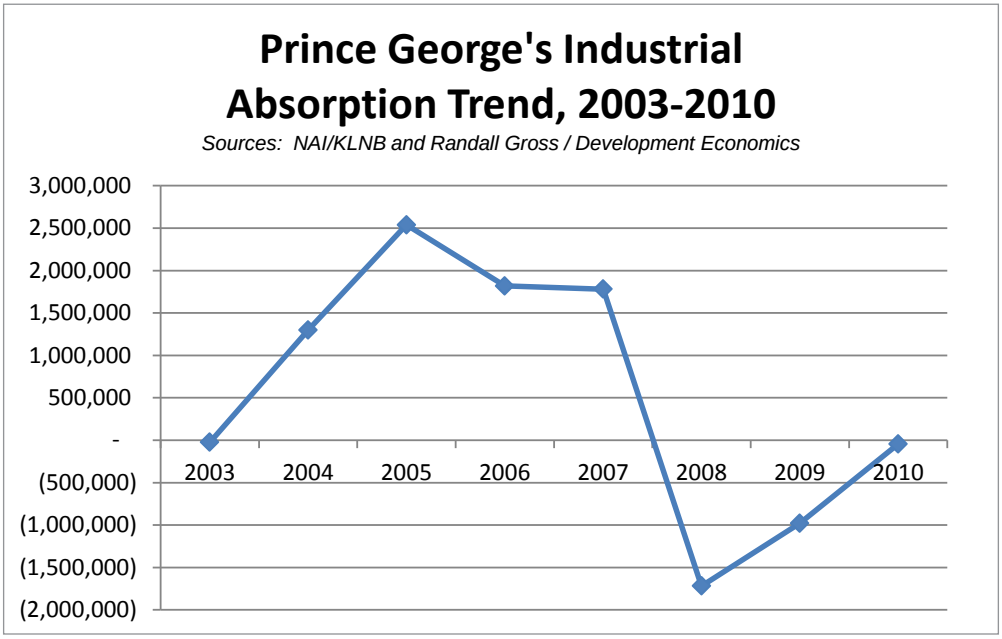


Figure 6.4 Prince George's Industrial Absorption Trend Chart

Market Absorption Trends. Industrial absorption increased between 2003 and 2005 when it peaked at more than 2.5 million square feet. Since then, absorption has fallen back and reached negative territory in 2008–2010 although it has improved for the last two years. Industrial absorption within the submarket has exceeded that of the county as a whole. There has been more land available for industrial development, particularly for larger distribution uses, than in areas within certain crowded, older industrial areas inside the Beltway. As industrial businesses expand, they have looked to more formal industrial parks and areas along major transportation routes outside of the Beltway. (See Figure 6.4 on page 90.)

The Outer Beltway submarket has also out-performed the county as a whole, due in part to relocations from inside to outside the Beltway.

Moving Average. Three-year moving averages were calculated for absorption in the market. The "average of averages" was 768,500 square feet for the period from 2003 through 2010. Absorption peaked at 2.1 million per year in the 2005–07 period but fell to a low of negative 900,000 from 2008–2010. The moving average within the Outer Beltway submarket was 920,500 square feet during 2006–08, exceeding the countywide average of 627,240. (See Figure 6.5 on page 91.)

Period	Average Absorption
2003–2005	1271132
2004–2006	1885364
2005–2007	2045663
2006–2008	627241
2007–2009	(304981)
2008–2010	(913312)
Moving Average	**768518**
Base Average	*584047*

Figure 6.5 Moving Average Table

Industrial Demand Forecasts

Industrial demand was forecasted for the Prince George's market and for the submarket consisting of Southern Prince George's County outside of the Beltway. Demand was forecasted based on a combination of economic and industrial employment projections and absorption data coupled with information on marketing projects and available land.

Industrial Employment. Employment and productivity was examined for those economic sectors that drive demand for industrial space. Manufacturing, warehousing & storage, and certain transport industries were key sectors in this analysis. Prince George's County saw employment in these sectors increase and peak as late as 2003, before a gradual decline that has resulted in the overall loss of almost 2,200 jobs since 1998 at a rate of 0.5% per year. While the county had nearly 40,000 industrial jobs in 2003, by 2010, there were less than 33,000. (See Table 8 below.)

Table 8. INDUSTRIAL EMPLOYMENT TRENDS & FORECASTS PRINCE GEORGE'S COUNTY AND SELECTED ZIP CODES, 1998–2020

Year	Prince George's County	Greater Upper Marlboro Area
1998	34,867	
2000	35,448	
2003	39,030	
2008	34,329	4,310
2010	32,680	4,140
2015	31,100	4,600
2020	30,800	4,900
1998-2010 Ch	(2,187)	(170)
% Change/Yr	-0.50%	-2.00%
2010-2020	(1,880)	760
% Change/Yr	-0.60%	1.80%

Sources: Metropolitan Washington Council of Governments; U.S. Census Bureau; and Randall Gross/ Development Economics.

Greater Upper Marlboro

The industrial area comprising Greater Upper Marlboro and surrounding portions of Southern Prince George's County also saw a decrease in industrial employment in recent years to around 4,100 in 2010. According to the U.S. Economic Census, the area lost about 200 jobs or 2.0 percent per year. However, industrial employment is projected to increase in this area by 2015 and again through 2020. This area is projected to gain nearly 800 jobs, yielding a growth rate of 1.8 percent per year by 2020. This growth will occur despite a continued decrease in industrial employment in the county as a whole. Between 2010 and 2020, the county is projected to lose about 2,000 industrial jobs or 0.6 percent per year. In general, the shift in economic activity from inside the Beltway toward the outer suburbs like Upper Marlboro is expected to continue although moderating somewhat due to a gradual reduction in available expansion land.

Demand Forecasts

Two models were designed to forecast demand for industrial space within the submarket. The employment model forecasts demand for about 185,300 square feet of industrial space by 2015 and another 212,200 square feet by 2020. The absorption-based model forecasts demand for about 50,000 square feet by 2015, increasing to 121,900 square feet by 2020. The difference can be attributed in part to the ability of the area to capture the economic growth opportunities that are available. Overall, the two models represent the lower and higher end of the range in demand.

Competitive Framework

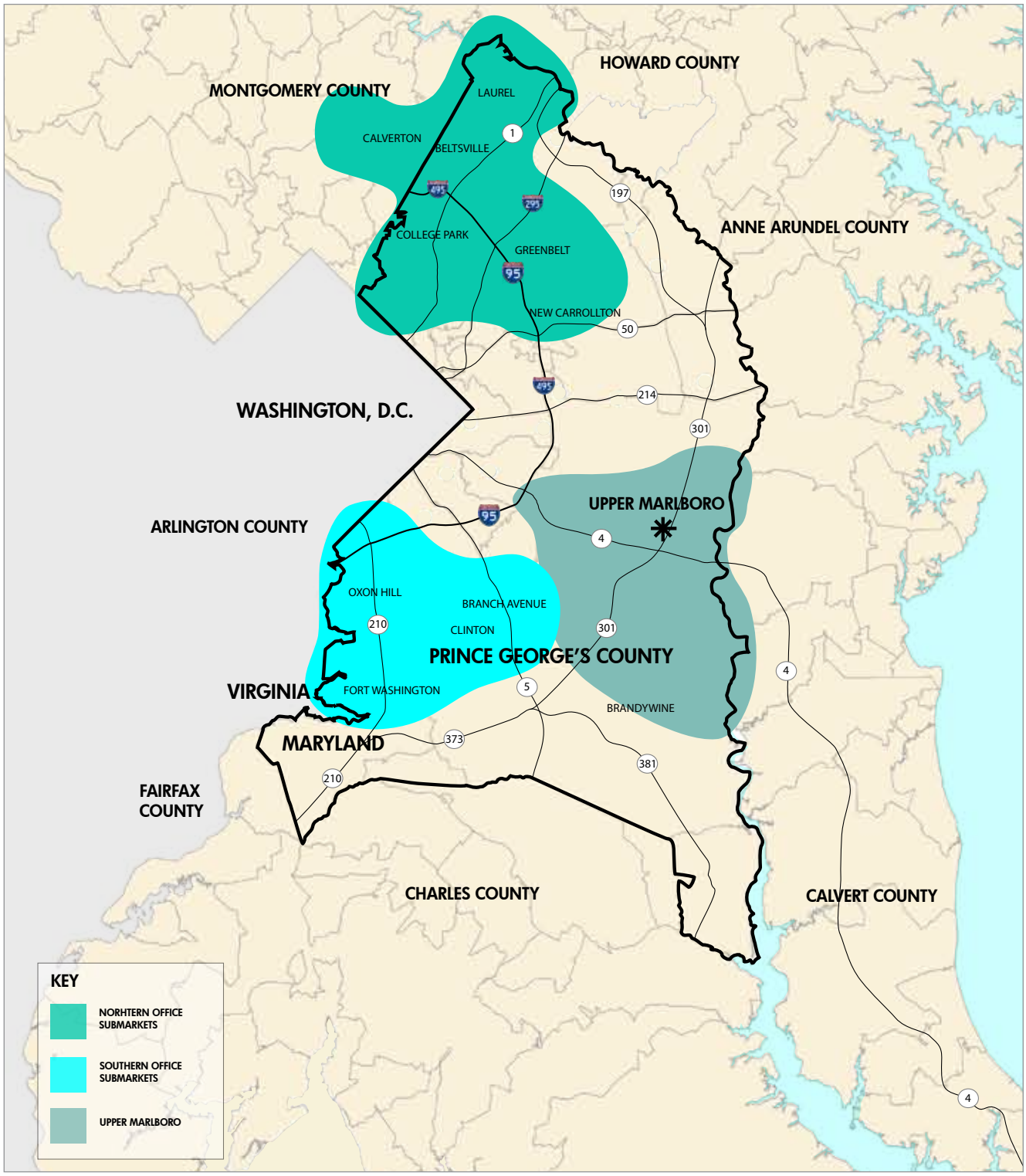
Within the submarket (see Map 6.3 on page 87) , a primary competitor for industrial development is the Collington Commerce Park (Collington Trade Zone Center) north of the site, with 3.4 million square feet located near the intersection of US 301 and MD 214. Another 422 acres is slated for development at Collington, one of the primary industrial nodes now under development in Prince George's County. Washington Business Park is also competitive with another 3.1 million square feet of industrial space. Other key competitive industrial nodes include Goddard Corporate Park/Maryland Corporate Center, Largo Town Center, and the University of Maryland Science and Technology Center (with a total 465 acres). About 600,000 square feet of industrial development is eventually planned for Hampton Park. Other locations around the Beltway are also competitive for industrial development.

Jackson Shaw Company has planned an 80-acre "secure" industrial and business park near Joint Base Andrews Naval Air Facility Washington ("Joint Base Andrews") (formerly Andrews Air Force Base) as part of the proposed national defense and technology corridor. This park would be built at I-495 and Suitland Parkway. The park would have setbacks and security barriers for protection. A federal agency is among the possible secured tenants. The park benefits from being located in a Base Realignment and Closure (BRAC) zone (allowing financial assistance) and a county enterprise zone. Key tenants will be local, state, and federal government agencies and Joint Base Andrews itself. This park will not compete with Upper Marlboro directly, since its client base will be oriented directly to secure proximity to Andrews.

Study Area Potentials

The study area is well-positioned to capture a significant share of industrial demand due to its location along two major highway routes, MD 4 and US 301, which intersect at the study area. US 301, in particular, provides important access north and south for industrial distribution. The route is especially important for companies with markets in Philadelphia or Baltimore, south into Virginia, and for those that want to avoid D.C. traffic.

Map 6.4 Office Submarkets



Under a "Status Quo" scenario, assuming marketing of only the study area, the market analysis forecasted potential for the study area to capture about 50,000 square feet of industrial use by 2015 and another 120,000 square feet by 2020. Even in this scenario, it is assumed that existing physical constraints (e.g., floodplain cost issues) will be ameliorated and that an environment will be created to support industrial development such as through definition of a marketable industrial park through infrastructure improvements.

Under a more aggressive "Regional Hub" scenario, the market analysis forecasted maximum study area potential for up to about 105,000 square feet of industrial use by 2015 and another 195,000 square feet by 2020, or up to 300,000 square feet total by 2020. In this scenario, existing physical constraints are ameliorated and infrastructure improvements are made to upgrade the environment for industrial development as in the status quo scenario. But in addition, the study area would be incorporated into a broader economic development strategy for the MD 4/US 301 Interchange that would promote industrial and commercial development east and west of the interchange. (See Figure 6.6 below.)

INDUSTRIAL SITE POTENTIALS		
Period	Status Quo	Regional Hub
2010–2015:	50,000	105,000 sf
2015–2020:	120,000	195,000 sf
TOTAL	170,000	300,000 sf

Figure 6.6 Industrial Site Potentials Table

Again, these regional hub forecasts are based on the assumption that the broader area surrounding the intersection of US 301 and MD 4 would be marketed for development as a regional business node. The potentials also assume that there would be land for development or redevelopment and that a competitive industrial park would be created to accommodate this demand by 2015. Such a park would offer competitive pricing not impacted by additional costs associated with meeting floodplain building standards (or where such costs are met through county/state subsidy or incentives). This output is consistent with the findings of the Land Needs Study, which found that the Upper Marlboro industrial area is "deindustrializing and transitioning" but also stated that "Category 3 Land [i.e., the Upper Marlboro industrial area] represents the county's best opportunity for economic development with the least amount of conflict between land uses."

Target Industrial Uses

The most competitive uses for this site would include industrial service, warehouse/showroom, distribution, light manufacturing (relocating from inside the Beltway), and transport and logistics-related businesses. Again, the most likely tenants would include companies having a Maryland and Virginia customer base.

Office Market

The Office Market Area includes the Washington-Baltimore Corridor counties of Prince George's, Anne Arundel, and Howard. Southern Prince George's County, the submarket where the study area is located, has limited recognition as an office market, because there are few major office nodes in the area. Most of the county's office development is concentrated in the northern half of Prince George's County. It is important to note, however,

that the county's executive offices and courts are located within the Town of Upper Marlboro. The county is therefore a main driver for office uses and spin-off office demand in the study area. (See Map 6.4 on page 93.)

Existing Market Conditions and Trends

Prince George's County has a total office inventory of about 21,600,000 square feet. This inventory has increased at a rate of about 1.4 percent per year for the past several years. The southern Prince George's County submarket has about 5,800,000 square feet and therefore represents about 27 percent of the county's office market. However, little of this space is concentrated in the Upper Marlboro area. Even so, southern Prince George's County has a larger supply of office space than the Landover-Lanham node, which has a total of about 4,950,000 square feet. (See Map 6.4 on page 93, showing office submarkets.)

Vacancy. Prince George's County had a direct office vacancy rate of 15.1 percent in 2009 as compared with an overall suburban Maryland vacancy rate of only 9.4 percent. Within the southern Prince George's County submarket, direct vacancy was 11.7 percent, second lowest of the five Prince George's County submarkets (after Laurel). Oddly, vacancy in newer buildings was higher in Prince George's (at 16.7 percent) than it was overall. Newer construction had been taking longer to absorb in this market. In other markets, vacancies are lower in newer construction.

Absorption. Prince George's County saw absorption fall from more than 435,000 square feet in 2007 to (negative) net absorption of -55,000 square feet in 2008 and even lower to -347,000 square feet in 2009. However, the market appears to be stabilizing (albeit still in the negative range) with total absorption of -42,000 square feet in 2010.

Between 2007 and 2009, the county had positive annual absorption of 11,000 square feet per year based on an analysis of three-year moving averages. However, during the 2008 to 2010 period, absorption fell to -148,000 square feet per year. Over the full period, there was an average annual absorption of -68,500 square feet on a base average of 2,250 per year. (See Figure 6.7 below.)

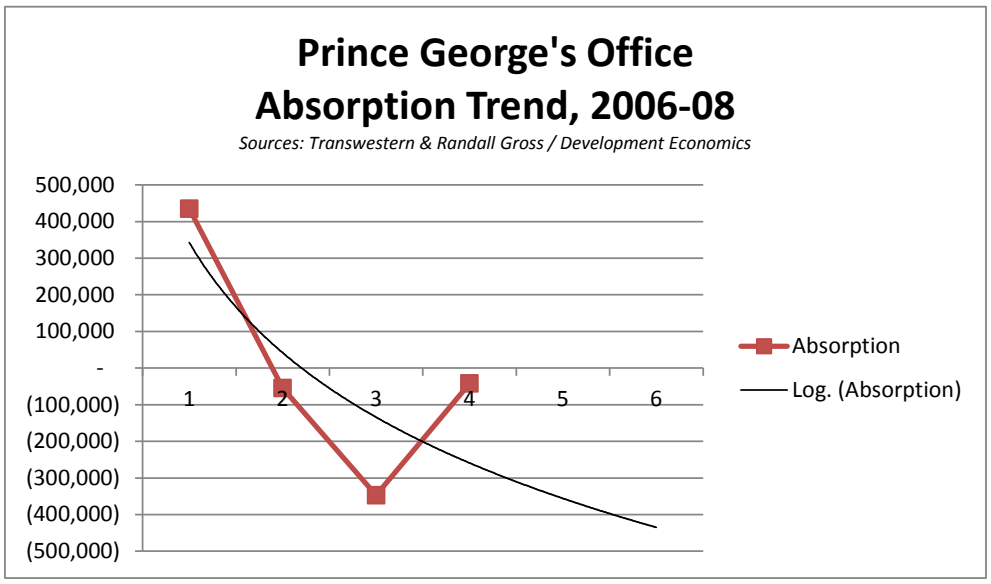


Figure 6.7 Prince George's Office Absorption Trend Chart

The southern Prince George's County submarket has also seen negative absorption of office space in recent years. But since the market is small, even the relocation or closure of one large company can have a deleterious impact on the overall market. The submarket accounts for less than 10 percent of the county's office employment but

yielded nearly 30 percent of the county's overall loss in occupied space (negative absorption) over the past four years. The 2007–2010 three-year moving average was -19,800 square feet. While the loss was less substantial than in the county as a whole (-68,500), it still represented negative absorption.

Office Demand Forecasts

Office demand was forecasted for the area of southern Prince George's County surrounding the study area based on economic (employment) and absorption models. Key findings from this analysis are summarized below.

Office Employment Trends and Forecasts. Office employment is an important indicator of the demand for office space. Trends in employment and output were examined for industries that generate demand for office space. Many industries, ranging from FIRE (finance, insurance, and real estate) to manufacturing, generate some demand for office buildings and space. The share of office use in each industry in the surrounding area was analyzed and overall trends and forecasts examined. These trends and forecasts are summarized in Table 9.

Table 9. OFFICE EMPLOYMENT TRENDS & FORECASTS PRINCE GEORGE'S COUNTY AND SELECTED ZIP CODES, 1998–2020

Year	Prince George's County	Market Node
1998	54,881	
2000	54,515	
2003	57,187	
2008	48,375	4,500
2010	46,880	4,230
2015	48,500	4,500
2020	50,100	4,900
1998-2010 Ch	(8,001)	(270)
% Change/Yr	-1.20%	-3.00%
2010-2020	3,220	670
% Change/Yr	0.70%	1.60%

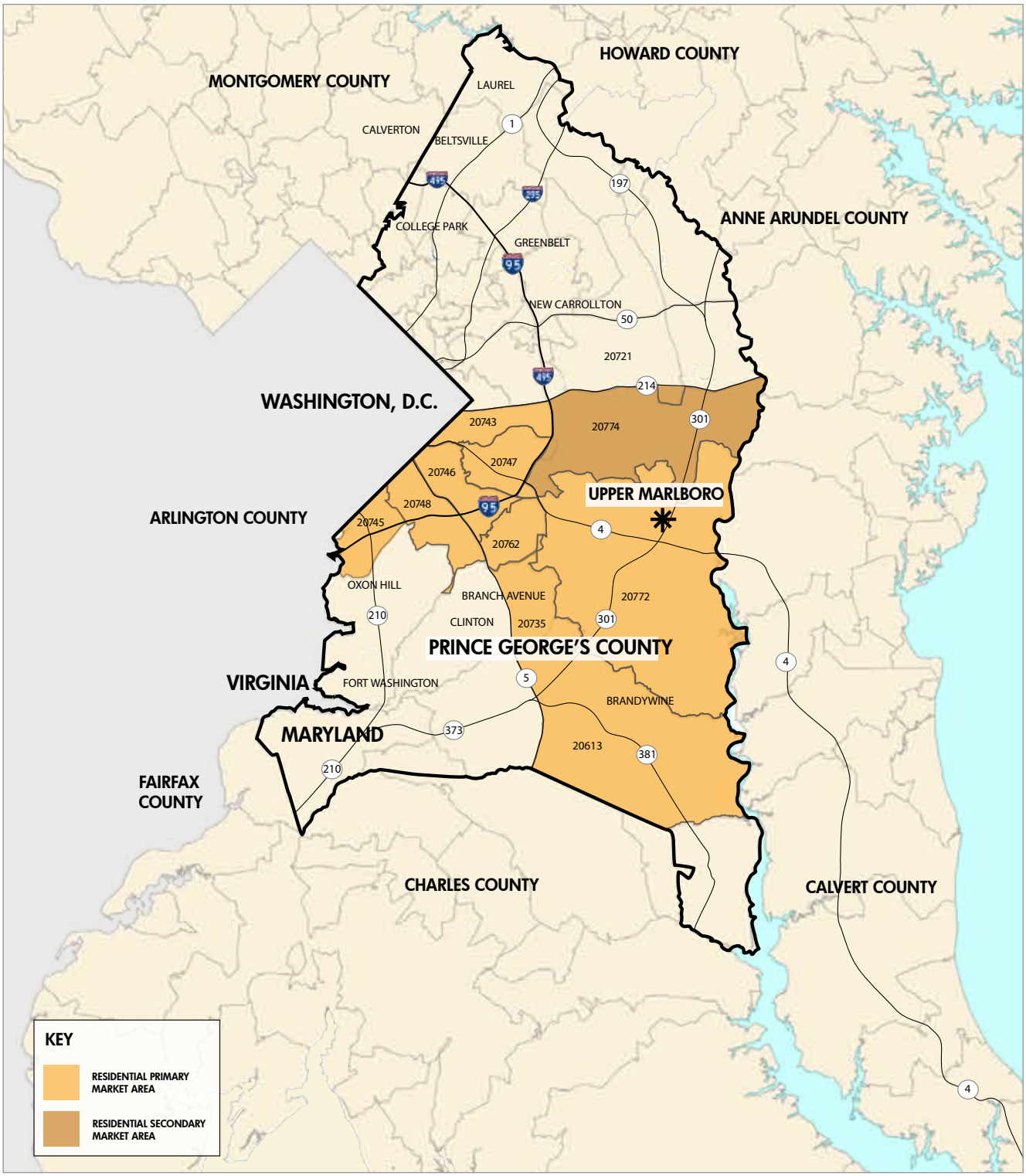
Sources: Metropolitan Washington Council of Governments; U.S. Census Bureau; and Randall Gross/Development Economics.

Prince George's County had about 54,900 office workers in 1998. This number increased to 57,200 in 2003 before falling back to less than 47,000 by 2010 due in part to national recession. Between 1998 and 2010, the county's office employment fell by about 8,000 jobs or 1.2 percent per year. Within the area surrounding the study area, office employment fell from 4,500 in 2008 to about 4,200 in 2010. However, office employment is forecasted to increase by 670 (1.6 percent per year) in the area, according to the MWCOG. Similarly, Prince George's County's office employment is forecasted to increase by 3,200 or 0.7 percent per year by 2020.

Demand Forecasts

Office space demand was forecasted based on office employment and absorption models. The employment model would generate demand for about 10,500 square feet by 2015 and about 19,000 square feet by 2020.

Map 6.5 Residential Market Area Map



The absorption model generates demand for about 14,000 square feet by 2015 and 68,400 by 2020. Thus, there is a range in demand of about 29,000 to 82,000 square feet by 2020. (See Figure 6.8 below.)

Model	2010-2015	2015-2020
Employment	10,530	18,900
Absorption	13,690	68,400

Figure 6.8 Space Demand

Competitive Framework

Key competitors for study area office space include Bowie, Waldorf, and areas along the Beltway. Key competitive projects include University of Maryland Science and Technology Park/Park Melford, Patriot Center (Greenbelt), Hampton South Business Center, Collington Commercial Center, and others.

Office Site Potentials

It is unlikely that the study area could attract major office development in the near term. A status quo scenario generates potential for about 14,000 square feet, even if an attractive environment is created to support office development and physical constraints are ameliorated. However, if part of a broader proactive marketing strategy that positioned the intersection of US 301 and MD 4 as a business and consumer hub, then the area may attract certain anchor office uses, totaling 80,000 to 90,000 square feet. Under both scenarios, there is the assumption that land and an attractive office environment, with supporting amenities, is created to support such development. (See Figure 6.9 below.)

Office Site Potentials		
Period	**Status Quo**	**Regional Hub**
2010-2015:	5,500	24,000 sf
2015-2020:	8,900	60,000 sf
TOTAL	14,400	84,000 sf

Figure 6.9 Office Site Potentials

Target Office Uses

Under an aggressive marketing strategy that promoted development of all four quadrants of the US 301/ MD 4 interchange, the site may attract service-oriented office use, along with manufacturing company offices, back-office, county government use, and non-profit/association offices. As population of the area increases, demand could increase for "consumer-oriented" office space (e.g., financial services, and real estate). There is not likely to be a major office impact at the site from realignment and growth at Joint Base Andrews although there may be a need for space for companies that serve new residents brought by the expanded base activity.

Summary

The market analysis has forecasted potential for up to about 80,000 square feet of office space and 300,000 square feet of industrial space in the Greater Upper Marlboro study area by 2020. Under the status quo scenario, there would be potential for about 14,000 square feet of office space, while a regional hub scenario would generate potential for 80,000 to 90,000 square feet by 2020. Similarly, the lower scenario will generate potential

for about 170,000 square feet of industrial space, while marketing the regional hub will help capture potential for about 300,000 square feet.

6.4 Residential Market Analysis

This section summarizes findings from a residential market analysis that tested the potential for both rental and for-sale housing within the study area. At the present time, there is relatively little residential use within the study area itself, although the area borders several residential neighborhoods and therefore impacts on the marketability of housing within those neighborhoods. Highways surrounding the study area serve as the "front door" for residential communities, and the image it conveys, the amenities it provides, and the retail convenience it offers impact on the overall marketability of the adjoining residential neighborhoods.

Residential Uses and Neighborhoods

As noted above, there is limited residential use within the study area itself, although there are about 50 residential units on roads adjacent to the study area. These homes are generally located along MD 725/Marlboro Pike and MD 202/Largo Road, Peerless Avenue, and Chelsea Lane. The Town of Upper Marlboro is located just west of the site. Neighborhoods and subdivisions in the Greater Upper Marlboro area include Marlborough Lakeside, Villages of Marlborough, Bishops Bequest, Highland Gate, Marlboro Downs, Foxchase, Kings Grant, Marlboro Riding, Marlboro West, Brock Hills, Brock Hall, Collington Estates, Balmoral, Beech Tree, Marlboro Meadows, Stratford Estates, Ellerslie, Beacon Hill Estates, Somerton, The Reserve, Rosehill Estates, South Weston, and others.

These neighborhoods include a mix of townhouses, single-family detached homes, and estate homes. Higher-density housing is located around Marlborough Country Club. There are several multifamily projects in this area, including mid-rise condominiums such as Lords Landing Condominiums and others located along Farnsworth, Lord Loudoun, Lord Dunmore, and elsewhere. The Village of Churchill's Choice rental apartments are also located in this area. A number of three-story attached townhomes are located off of John Rogers Boulevard near the country club. Marlborough Terrace is an older in-town neighborhood offering attached townhouse development. Areas like Marlboro Riding and Kings Grant offer larger estate homes on quarter- and half-acre lots.

A Mixed Use-Transportation Oriented (MXT) zone is proposed north of MD 725 that is expected to accommodate primarily residential uses in the future. Thus, there are opportunities for further residential development within a short distance of the study area.

Demographic Assessment

A demographic trends analysis was conducted as one input to forecasting demand for housing within the study area. The primary housing market area is defined and key demographic trends are analyzed from 1990 through 2010.

Housing Market Area

The residential market area for this study is roughly bounded by MD 214 (north), MD 5/381 (south), and the county boundaries (east and west). A market area is a geographic area from which a share of the demand for housing can be generated, including outside areas that may generate move-ups/downs into the study area. This area includes Capitol Heights, District Heights/Forestville, Suitland, Andrews Air Force Base, and Greater Upper Marlboro. The zip codes included in this primary market area are 20731, 20743, 20791, 20747, 20753, 20746, 20752, 20762, 20772, and 20773. (See Map 6.5 on page 97.)

Demographic Trends

Population, households, and other demographic indicators were analyzed for the market area as a basis for assessing housing demand.

Population. Market area population is estimated at nearly 151,000, up by 10,700 or 7.6 percent from 1990. This increase translates into an annual population growth rate of about 0.38 percent per year. Almost all of the growth was located in the eastern portion of the market area surrounding Upper Marlboro. This area added about 16,200 people (70.6 percent). In the area around Joint Base Andrews population fell from 10,228 in 1990 to 6,547 by 2010, a drop of 36 percent due to alignments in the air force between 1990 and 2000. In the remaining area, the western portion, the population fell by 1,764 or 1.6 percent. (Table 10)

Table 10. DEMOGRAPHIC TRENDS, UPPER MARLBORO HOUSING MARKET AREA 1990-2010

Factor	1990	2000	2010	1990-2010 Change	
				Number	Percent
Population	140,211	151,324	150,937	10,726	7.60%
Households	48,208	54,837	55,121	6,913	14.30%
Families	35,195	38,723	38,859	3,664	10.40%
Group Qtr	4,067	3,166	3,484	(583)	-14.30%

Sources: U.S. Census Bureau; Claritas, Inc.; and Randall Gross/Development Economics.

Group Quarters Population. The market area has about 3,500 residents living in group housing, with about 1,500 at Joint Base Andrews. Since 1990, group housing population fell by about 600 or 14.3 percent, although most of this decrease was due to the Joint Base Andrews realignments. Group quarters population increased in the eastern portion of the market area by 18.2 percent and fell in other areas by 7.1 percent. In addition to the air force base, group housing can include prisons and dormitories in the area.

Households and Families. Population growth has translated into household growth as well. Market area households increased by 6,900 or 14.3 percent from 1990 to 2010, a total of about 55,100. Area 1 gained 6,620 households, for a growth rate of 88.9 percent, while the area near Joint Base Andrews lost about 725 households due to realignments at Joint Base Andrews. Interestingly, the remaining area added over 1,000 households (2.6 percent) during this period, despite the decrease in population. This growth resulted from a continuing decrease in average household size within the western portion of the market area closer to the District of Columbia. The growth in household base generated demand for housing in the area.

The number of families within the market area has increased by 10.4 percent, with the addition of about 3,670 families since 1990. Not surprisingly, family growth was concentrated in the eastern portion of the market area. This area saw an increase of about 4,400 families or 73.9 percent. Even though the number of households increased in the western portion of the market area, the number of families in that area decreased. As noted above, average household size fell, indicating that there were more empty nesters, couples without kids, and singles living in that area.

Housing Stock Trends

Prince George's County has 322,100 housing units, according to 2009 census estimates. Of this number, about 60,170 are located within the market area (see Map 6.5 on page 97), constituting 18.7 percent of the county's

housing stock base. The largest share of market area housing is located in Subarea 3, which includes the populous Washington suburbs inside and just outside the Beltway. The area's housing is dominated by single-family detached units, although there are sizeable numbers of multifamily units.

Prince George's County has permitted almost 25,300 housing units since 2000. About 7.8 percent of these (1,960) were in multifamily buildings. Almost all of the county's housing was permitted in unincorporated areas with only about 1,200 units permitted for construction within incorporated towns or cities in the county. About 2,300 units per year have been permitted in Prince George's County, but construction activity has fallen off in recent years. Between 2000 and 2005, there were nearly 2,800 units permitted per year. However, that number had fallen to just 1,700 per year between 2006 and 2010. Less than 800 units are estimated to have been permitted in 2010. Housing trends are summarized in Table 11 for Prince George's County and its unincorporated areas by type of unit.

Table 11. HOUSING CONSTRUCTION PERMIT TRENDS, PRINCE GEORGE'S COUNTY, 2000–2010

Year	Prince George's County			Unincorporated Area			
	SF	MF	Total	SF	MF	Total	Share
2000	2,543	209	2,752	2,513	209	2,722	99%
2001	3,049	-	3,049	3,005	-	3,005	99%
2002	2,470	78	2,548	2,444	78	2,522	99%
2003	2,810	128	2,938	2,597	128	2,725	93%
2004	1,875	73	1,948	1,840	73	1,913	98%
2005	3,255	170	3,425	3,144	170	3,314	97%
2006	2,918	115	3,033	2,825	115	2,940	97%
2007	1,462	721	2,183	1,374	270	1,644	75%
2008	1,296	10	1,306	1,252	10	1,262	97%
2009	819	440	1,259	756	434	1,190	95%
2010	719	17	736	696	12	708	96%
			-				
Total	23,216	1,961	25,177	22,446	1,499	23,945	95%
Average Annual	2,111	178	2,289	2,041	136	2,177	95%
2000–2005	2,667	110	2,777	2,591	110	2,700	97%
2005–2010	1,443	261	1,703	1,381	168	1,549	91%

Notes: SF is single-family, MF is multifamily. 2010 is annualized.

Sources: U.S. Census Bureau (Building Permits); Randall Gross/Development Economics.

Census data suggest that only two percent of the county's housing was built since 2005, while 25.6 percent was built prior to 1950.

Vacancy

Prince George's County homeowner vacancy rates averaged 1.6 percent in 2009, while rental vacancies averaged 9.7 percent. Overall, vacancy rates have increased by 0.4 percent for for-sale housing and by 1.2 percent for

rental housing since 2004. Thus, despite a dramatic decrease in construction, vacancy rates have increased indicating continued challenges for financing and consumer credit within the housing market. Vacancy rate trends for for-sale (homeowner) and rental housing are summarized in Table 12.

Table 12. HOUSING VACANCY RATE TREND PRINCE GEORGE'S COUNTY, 2004–2009

Year	Homeowner	Rental
2004	1.20%	8.50%
2005	0.80%	6.60%
2006	0.80%	6.40%
2007	2.10%	7.50%
2008	2.00%	8.10%
2009	1.60%	9.70%
2004–2009	0.40%	1.20%

Sources: U.S. Census Bureau and Randall Gross/Development Economics.

Market Area

The overall market area homeowner vacancy rate averaged 2.1 percent between 2005 and 2009. This compares with an average of only 1.5 percent for the county as a whole during this period. Thus, the market area homeowner vacancy rate was 40 percent higher than the county's as a whole. Similarly, the market area had an average rental vacancy rate of 9.6 percent during the 2005–2009 period, 25 percent higher than the county's 7.7 percent rental vacancy rate.

Within the Market Area, the highest homeowner vacancy rates were in Capitol Heights, Friendly, and Morningside. Vacancy rates of 5.0 percent in for-sale housing are relatively high, not only for the market area but also in the region in general. The age and location of these communities does not explain the high vacancy rates, since similar communities like District Heights and Suitland have relatively low vacancy rates. Upper Marlboro has a negligible for-sale housing vacancy rate, but the town has very few housing units in its base.

Rental vacancy rates are extremely high in District Heights, at 18.3 percent or nearly twice the market area average. High vacancies in Morningside, Forestville, and other areas are also worrisome. Upper Marlboro has an 11.1 percent vacancy rate, 5th highest out of 15 communities sampled in the market area. Rental vacancy rates for the Upper Marlboro Market Area and many of its constituent communities are summarized based on survey data collected from 2005 through 2009 in Table 13 on page 103.

Table 13. RENTAL VACANCY RATES & MEDIAN RENT UPPER MARLBORO MARKET AREA AND PRINCE GEORGE'S, 2005–2009			
Area	**Homeowner**	**Renter**	**Median Rent**
PRINCE GEORGE'S COUNTY	1.50%	7.70%	$1,065
MARKET AREA 1/	2.10%	9.60%	$965
Camp Springs	3.90%	1.80%	$953
Capitol Heights	5.00%	9.90%	$859
Clinton	1.30%	4.20%	$1,076
District Heights	0.60%	18.30%	$836
Forest Heights	2.30%	0.00%	$855
Forestville	1.10%	14.70%	$982
Friendly	5.00%	0.00%	$1,405
Hillcrest Heights	1.70%	7.20%	$893
Marlton	1.40%	13.40%	$1,209
Morningside	4.40%	15.20%	$1,400
Oxon Hill-Glassmanor	2.80%	9.20%	$943
Rosaryville	1.30%	10.90%	$1,206
Suitland-Silver Hill	0.60%	10.70%	$938
Temple Hills	2.20%	11.10%	$1,072
Upper Marlboro	0.00%	11.10%	$997
Notes: Based on 2005-09 American Community Surveys.1/ Selected locations in Housing Market Area.			
Sources: U.S. Census Bureau and Randall Gross/Development Economics.			

Housing Tenure

About 65 percent of housing in the market area is owner-occupied, with 35 percent renter occupied. The owner-occupancy rate increased, until fairly recently, due to historically low interest rates and available credit. About 76 percent of Upper Marlboro housing is owner-occupied. Housing tenure is summarized for selected market area communities in Table 14 on page 104.

Table 14. HOUSING TENURE, UPPER MARLBORO SITE MARKET AREA, 2005-2009				
Community	**Owner**	**Percent**	**Renter**	**Total**
Camp Springs	5,237	82.50%	1,109	6,346
Capitol Heights	1,225	81.70%	274	1,499
Clinton	8,060	89.50%	946	9,006
District Heights	1,703	74.40%	586	2,289
Forest Heights	934	91.20%	90	1,024
Forestville	3,147	69.70%	1,365	4,512
Friendly	3,339	88.90%	419	3,758
Hillcrest Heights	3,699	54.30%	3,111	6,810
Marlton	3,006	90.70%	310	3,316
Morningside	458	85.40%	78	536
Oxon Hill-Glassmanor	6,492	48.20%	6,977	13,469
Rosaryville	5,296	93.20%	385	5,681
Suitland-Silver Hill	4,466	34.60%	8,430	12,896
Temple Hills	1,259	38.50%	2,012	3,271
Upper Marlboro	198	75.60%	64	262
TOTAL	48,519	65.00%	26,156	74,675
Note: Based on 2005-09 American Community Surveys.				
Sources: U.S. Census Bureau and Randall Gross/Development Economics.				

Several communities in the market area, namely Rosaryville, Forest Heights, and Marlton have extremely high homeownership rates of over 90 percent. Rosaryville has only 385 rental units, with renters in only 6.8 percent of the community's occupied housing. At the other extreme, Suitland-Silver Hill and Temple Hills have relatively low homeownership rates at 34.6 percent and 38.5 percent, respectively. There are more than 8,400 renter-occupied units in the Suitland area alone.

Mobility

Mobility rates are an important indicator of market "churn" and the movement of consumers in the market. About 50 percent of market area renters moved at least once over a 10-year period leading up to the 2000 Census. By contrast, more than 80 percent of homeowners had moved in the area during that same period. Normally, renters are more mobile than homeowners, so these numbers may indicate that there was a large share of homeowners who were move-ups and first-time buyers in the area on Table 15 on page 105.

Table 15. HOUSEHOLDS BY YEAR MOVED INTO UNIT UPPER MARLBORO MARKET AREA				
Period	**Area 1**	**Area 2**	**Area 3**	**TOTAL**
Before 1969	5.30%	0.00%	7.60%	6.80%
1970–79	11.10%	0.50%	10.40%	10.20%
1980–89	15.40%	0.40%	14.60%	14.30%
1990–99	68.20%	99.10%	67.50%	68.70%
Sources: U.S. Census Bureau and Randall Gross/Development Economics.				

Overall, about 68 percent of the eastern portion of the market area households and 67.5 percent of the western portion of the market area households moved into their units between 1990 and 1999. Only about 5 percent of Upper Marlboro-area households in 2000 had lived in their same house for more than 30 years. More than 99 percent of area households around Joint Base Andrews were recent moves, but this includes primarily Andrews Air Force Base and its transient population.

For-Sale Housing Market Trends

Data on for-sale housing market trends were analyzed, including information on sales, median list and sale prices, square footage, appreciation, days-on-market and other factors. Trends are summarized for Prince George's County as well as for the Upper Marlboro market area.

Prince George's County Market Factors

Prince George's County is one of the nation's most affluent communities, yet its housing is relatively affordable, especially compared with neighboring Montgomery County and other parts of the Washington, D.C., region. In 2010, the median sale price for housing in Prince George's County was estimated at $195,000. This compares with $355,000 in Montgomery County. Prince George's County housing sales trends from 2000 through 2010 are summarized in Table 16 on page 106, in terms of number of units sold, average price and median price. Median price trends in Montgomery County are also provided as a point of comparison.

Table 16. PRINCE GEORGE'S COUNTY HOUSING SALES TRENDS 2000–2010				
Year	**Units**	**Average Price**	**Median Price**	**Montgomery**
2000	15,215	$164,361	N/A	$190,000
2001	11,270	$146,229	$140,000	$215,000
2002	12,119	$166,013	$157,974	$255,275
2003	13,480	$1h95,398	$183,459	$295,500
2004	15,237	$238,285	$226,900	$355,000
2005	15,067	$308,060	$296,000	$425,000
2006	13,116	$341,456	$330,000	$439,000
2007	7,568	$333,139	$320,000	$444,000
2008	4,916	$291,771	$275,000	$395,000
2009	7,028	$231,608	$220,000	$340,000
2010	7,623	$209,953	$195,000	$355,000
Total/Ave	**122,639**	**$238,752**	**$213,121**	**$337,161**
2000-10	(7,592)	$45,592	$55,000	$140,000
%/Year	-4.50%	2.50%	3.90%	5.90%
2000-06	-2.00%	15.40%	22.60%	18.70%
2007-10	0.20%	-9.20%	-9.80%	-5.00%

Sources: Prince George's County Association of Realtors, Maryland Association of Realtors, and Randall Gross/Development Economics.

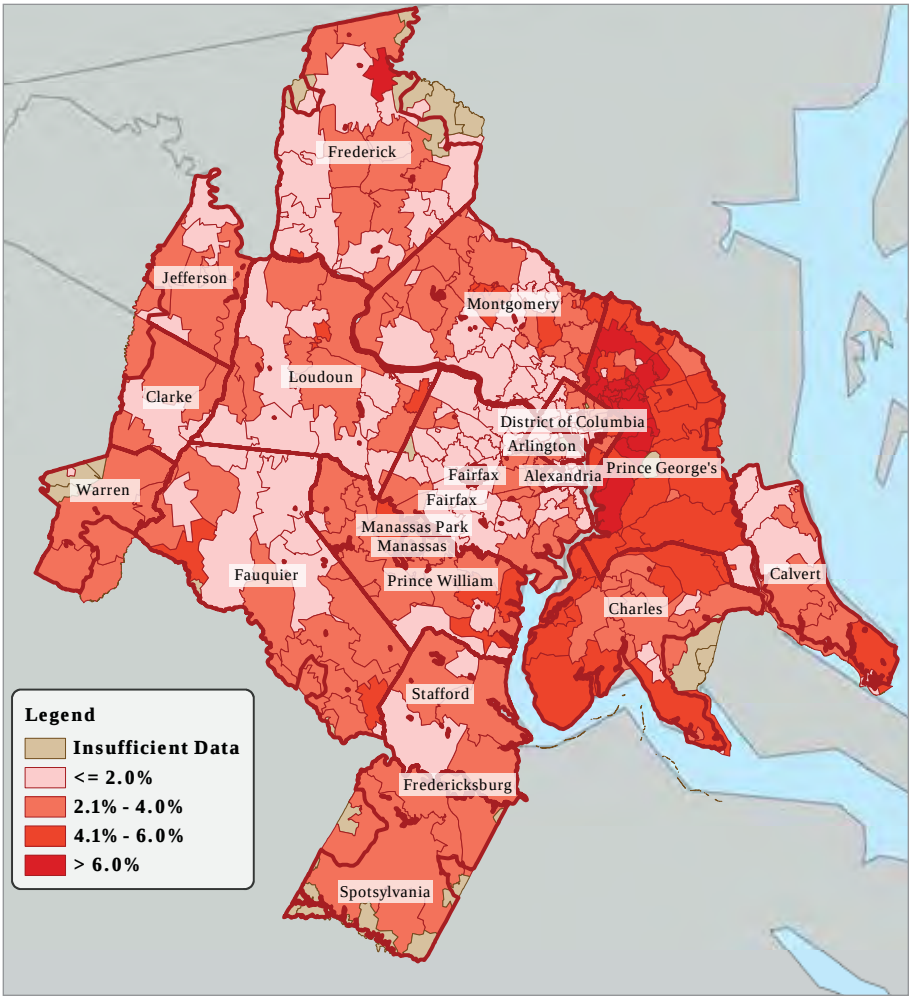
Overall, Prince George's County home sale prices have increased by $55,000 or about 3.9 percent since 2000. However, like most of the country, the county experienced a price escalation "bubble" during the early 2000s, resulting from historically low interest rates and highly available credit, which made housing more accessible and attractive as a short-term investment vehicle for larger numbers of people. Between 2000 and 2006, median Prince George's prices increased by 22.6 percent. During the late 2000s, prices retrenched in response to the "credit crunch," economic recession, and a resulting drop in demand. For Prince George's County, the shift in housing prices took place in 2006, when prices peaked at $330,000 before falling back in 2007 to $320,000. By 2010, Prince George's housing prices had fallen by almost 10 percent. As shown above, prices continued to fall in 2010 although there appears to be some stability as demand slowly aligns with existing supply. Housing prices in Montgomery County were not as volatile, peaking at 18 percent higher before falling back by 5 percent.

High Foreclosure Rates

Prince George's has been impacted more negatively by the volatility of housing financing than many other places in the region. A large share of the county's homebuyers may have relied on subprime lending and other credit schemes that offered people a chance to climb the "property ladder." Unfortunately, the credit crunch and housing price deflation, coupled with the economic downturn, have left Prince George's County in the position of having one of the highest foreclosure rates in the region. Significant portions of the county, particularly inside the Beltway, have mortgage foreclosure inventory rates exceeding 6.0 percent of the housing stock. The

severity of the problem in Prince George's County is highlighted in the following map prepared by the Urban Institute, September 2010. (See Map 6.6 below.)

Map 6.6 Foreclosure Inventory Rates Map Metropolitan Washington, D.C., Zipcodes



Source: Analysis by the Urban Institute of LPS Applied Analytics Data, September 2010

The high foreclosure inventory rates may help explain why the county's and market area's overall vacancy rates have increased in the most recent years even though less people are able to move due to the lower availability of mortgage credit.

Sales Volumes. The number of housing sales in Prince George's County has fallen dramatically since 2000. Overall, there have been more than 122,000 houses sold in the county since that date. However, the number of sales per year fell from 15,200 in 2000 to a low of just 4,900 in 2008. Sales began to increase moderately to about 7,000 in 2009 and 2,600 in 2010.

Housing Market Area Trends

The Upper Marlboro housing market area saw a total of about 10,500 home sales between 2005 and 2009 for an average of 2,100 per year. (See Table 17 on page 108.) This number represents about 3.8 percent of the

total for Prince George's County. The largest share of sales was in zip codes 20772 (Upper Marlboro area) and 20743 (Capitol Heights area). Even so, Upper Marlboro represented only 1.4 percent of the county's overall sales and Capitol Heights 1.2 percent. The number of sales peaked in 2006 at 3,139 before falling back to only 823 in 2008. By 2009, the number of sales had begun to increase again, but some of this increase can be attributed to federal tax incentives that came into effect to spur the market.

Table 17. UPPER MARLBORO HOUSING MARKET AREA HOME SALES TRENDS, 2005–2009

Year	20772	20743	20746	20747	Total
2005	1,053	941	310	563	2,867
2006	1,013	1,064	347	715	3,139
2007	590	576	265	404	1,835
2008	325	226	121	151	823
2009	760	560	200	330	1,850
Average	**748**	**673**	**249**	**433**	**2,103**
% of PGC	1.40%	1.20%	0.40%	0.80%	3.80%

Sources: State of Maryland, MRIS, City-data.com, and Randall Gross/ Development Economics.

Market area median sales prices were about $263,300 by the end of 2009, up by 11.9 percent over 2005. (See Table 18 below.) However, prices had peaked at nearly $300,000 in 2007 before falling back since that time. While large and diverse, the market area has remarkably consistent housing prices, ranging from about $234,000 in 20743 (Capitol Heights) to $286,000 in 20772 (Upper Marlboro). What is not consistent however is the trend in prices. Between 2005 and 2009, prices increased by nearly 29 percent in 20747 (District Heights/Forestville) and 27 percent in Capitol Heights but fell by 2.9 percent in Upper Marlboro. In some ways, the period saw an "evening out" of prices between the various areas, with the lower-priced regions catching up to Upper Marlboro. New homes accounted for a much larger share (22.6 percent) of sales in Upper Marlboro than in the county as a whole (9.9 percent).

Table 18. UPPER MARLBORO HOUSING MARKET AREA HOME SALES PRICE TRENDS, 2005–2009

Year	20772	20743	20747	20746	Weighted Average
2005	$295,000	$184,500	$221,130	$216,725	$235,374
2006	$345,000	$235,000	$273,500	$297,000	$288,877
2007	$355,000	$250,000	$285,000	$295,905	$298,921
2008	$344,000	$230,000	$250,000	$290,000	$288,967
2009	$286,400	$234,200	$284,500	$246,900	$263,348
2005–2009	($8,600)	$49,700	$63,370	$30,175	$27,974
Percent	-2.90%	26.90%	28.70%	13.90%	11.90%

Sources: State of Maryland, MRIS, City-data.com, and Randall Gross/Development Economics.

Rental Market Trends

Trends in the rental apartment market were also analyzed, with a particular focus on occupancy, rents, and sales of investor rental units. These trends are discussed below.

Prince George's County

The median rent in Prince George's County was $1,190 in 2009, up by $413 or 5.6 percent per year from 2000. Rent escalation slowed toward the end of the decade, with rents increasing by $251 or 4.7 percent per year since 2004. Rents increased fairly consistently during the ten-year period, although the escalation rate varied from 1.7 percent in 2004 and 2009 to 9.4 percent in 2003. Overall median rent trends for the county are shown in Table 19.

Table 19. MEDIAN RENT TREND, PRINCE GEORGE'S COUNTY, 2000–2009

Year	Amount	Change
2000	737	
2001	791	7.30%
2002	808	2.10%
2003	884	9.40%
2004	899	1.70%
2005	979	8.90%
2006	1010	3.20%
2007	1057	4.70%
2008	1131	7.00%
2009	1150	1.70%
00-09/Yr	413	5.6%/Yr
04-09/Yr	251	4.7%/Yr

Sources: U.S. Census Bureau and Randall Gross/Development Economics

Housing Market Area

Rents increased in Prince George's County each year between 2000 and 2009 despite the addition of new multifamily supply (as shown on Table 11 on page 101 and Table 19 on page 109). Within the Upper Marlboro housing market area, the median rent is estimated at $965 based on an average from 2005 through 2009. Using this same methodology, Prince George's County's average rent for this period was $1,065. Thus, rents within the market area are about 10 percent lower than those in the county as a whole. Median rents for the 2005–2009 period in Upper Marlboro were about $997, 3.3 percent above the market area average but 6.4 percent below the countywide average. Gross rent, including utilities may be closer to about $1,280 in Upper Marlboro.

The highest rents in the market area are in Friendly ($1,400), Morningside ($1,400), Rosaryville ($1,200) and Marlton ($1,200). The lowest rents are found in District Heights ($836), Forest Heights ($855), and Capitol Heights ($859). In general, areas closer to the District tend to have lower rents in part because the apartments are older, provide Section 8 vouchers, and/or offer fewer amenities. In general, some of the higher-rent communities also have higher vacancy rates, suggesting a cost-sensitivity in the market. On the other hand, there is no direct

relationship between vacancy and rents in several high-rent communities like Friendly and Clinton, both of which have relatively low vacancy rates.

Competitive Housing Framework

The competitive housing framework was examined in detail in order to determine the study area capture of market demand against existing and planned residential projects. Particular focus was given to market area neighborhoods and to urban and new-urban housing and neighborhoods that are attracting target markets. Rental apartment complexes throughout the market area were also examined. Several key observations are summarized below from this assessment.

Market Area Neighborhoods

There are several competitive, higher-density for-sale and rental neighborhoods within the immediate market area that will have impact on the marketability of housing in the study area. Among these is existing housing like the Village of Churchill's Choice, which offers rentals in the $930 to $1,260 range along with access to Marlborough Country Club and other amenities; Lords Landing Condominiums are another existing higher-density product with available units in the immediate market area.

Among newer projects, Watkins Place is a mid-density housing development along MD 202 that offers competitive housing plans. Frontgate Farms is a new development with 20 single-family detached homes on half to two-acre lots. The Craftmark homes have 2,700 to 5,570 square feet and are priced from $519,900 to $674,900. Other developments along MD 202 include Ramblewood, Village of Oak Grove, Perrywood, and others. NV Homes is developing Oak Creek, with single family housing listed in the $390,000 range, off of MD 725 east of the study area. There are other projects like Balmoral Homes, off of US 301 North near Village Drive, Beechtree, Swanson Estates, Pleasant Colony, Fairview South, Marlboro Ridge, Cypress, and others. Active builders in the area include M/I Homes, Mid-Atlantic, Triangle, and a number of others.

Housing Demand Forecasts and Study Area Potential

Baseline housing demand was forecasted for the primary housing market area, which basically extends from the District line east to Calvert County and from MD 214 south to MD 5/381. Demand was forecasted based on demographic projections (population, households, etc.), mobility, and various market factors. Study area potential for new development was then determined as a capture of market area demand.

Demographic Projections

Market area population is expected to increase by about 6,800 between 2010 and 2020, for a rate of 4.5 percent. Overall 2010 market area population is estimated at 150,940 and is forecasted to increase to about 149,200 by 2015 and 157,800 by 2020. The number of households is forecasted to increase by about 3,020 or 5.5 percent by 2020. Total households are estimated at about 55,120, increasing to 54,600 by 2015 and 58,140 by 2020. (See Table 20 on page 111.) Household growth will outpace population growth because of continued decreases in average household size within this market.

Similarly, the number of families will increase at 5.5 percent or 2,160 over the 10-year period. There will be a total of about 41,000 families within the market area by 2020. The group quarter population will increase dramatically by 2020, adding about 14 percent. (See Table 20 on page 111.)

Table 20. DEMOGRAPHIC FORECASTS, UPPER MARLBORO HOUSING MARKET AREA, 2010–2020					
Factor	2010	2015	2020	2010–2020 Change	
				Number	Percent
Population	150,937	149,236	157,753	6,816	4.50%
Households	55,121	54,599	58,139	3,018	5.50%
Families	38,859	38,518	41,015	2,156	5.50%
Group Qtr	3,484	3,720	3,972	488	14.00%
Sources: U.S. Census Bureau; Metropolitan Washington Council of Governments; Claritas, Inc,; and Randall Gross/Development Economics.					

Demographic Growth-Generated Housing Demand

Housing demand was forecasted within the market area based on several factors and relating to several different niches in the market. Basic housing demand will be generated by growth in the number of households projected within the market area and the share of those households that are likely to move. Net housing demand generated by these households is forecasted to be about 240 units by 2020, but near-term demand is concentrated in for-sale housing. Overall, there is demand for about 680 for-sale housing units in the market area while there is declining demand (and increasing vacancy) for rental housing.

The greatest share of this demand will be generated by "baby boom" householders in the 55 to 75 age group as the population ages. Overall growth-generated housing demand is summarized in Table 21 on page 112.

Demand will be concentrated in households with incomes between $100,000 and $200,000 (unadjusted for inflation). The combination of aging population and higher incomes suggests increased demand for smaller but more valuable, amenity-driven housing such as that produced in "new urban" traditional neighborhood developments.

Table 21. GROWTH-GENERATED HOUSING DEMAND BY AGE AND TENURE UPPER MARLBORO MARKET AREA 2010–2020			
Age Cohort	Rental	Owner	Total
15-24	(58)	(8)	(66)
25-34	(181)	(23)	(204)
35-44	(349)	(922)	(1272)
45-54	(48)	(156)	(204)
55-64	63	507	570
65-74	95	892	987
75-84	33	309	342
85+	9	79	89
Total Units	**(436)**	**678**	**242**
Sources: Claritas, Inc. and Randall Gross/Development Economics.			

Based on an analysis of the study area within the competitive framework, it was determined that the study area would capture about 140 units of growth-generated housing demand by 2020. There would be demand for about 10 to 20 units of rental housing and about 120 units of for-sale housing. Again, much of the demand would be generated by householders in the 55 to 74 age cohort, suggesting that housing would be marketed to empty nesters and others without children. Certain factors, such as schools, become less important in housing location decisions when families have grown children.

Table 22. GROWTH-GENERATED HOUSING CAPTURED BY AGE AND TENURE UPPER MARLBORO STUDY AREA, 2020			
Age Cohort	**Rental**	**Owner**	**Total**
15-24	-	-	-
25-34	2	9	11
35-44	-	-	-
45-54	-	-	-
55-64	5	46	51
65-74	5	62	67
75-84	2	6	8
85+	0	0	0
Total	**14**	**123**	**137**
Source: Randall Gross/Development Economics.			

Employment-Induced Housing Demand

In addition to demographic growth and move-ups in the market, the market area would also generate housing demand induced by job growth among nearby employment drivers. Among key local employment drivers

specifically impacting demand in this area are Joint Base Andrews and the Prince George's County Government, which is based in Upper Marlboro.

Area Employment Trends

There were about 60,300 private sector employees working within the housing market area in 2008, up by 1,500 or 2.5 percent from 1998. The largest number of these workers is concentrated in zip codes 20772 (Upper Marlboro), 20743 (Capitol Heights), and 20735 (Clinton), each with around 11,000 jobs. However, growth has been focused in Capitol Heights, which added 2,200 jobs between 1998 and 2008, and Oxon Hill (20745), which added 1,300. Temple Hills lost 1,600 jobs or about 20 percent of its employment base between 1998 and 2008. Upper Marlboro lost about 730 jobs or 6.3 percent of its employment base during this period, even before the start of the most recent recession. Thus, there has been a shift in jobs within the market area over the past 10 years. This shift is indicated in Table 23 showing employment trends within the market and surrounding area.

Table 23. EMPLOYMENT TRENDS, HOUSING MARKET AND SURROUNDING AREA, 1998–2008

Zip Code	Area	1998	2008	1998–2008 Change	
				Number	Percent
20772	Upper Marlboro	11,478	10,752	(726)	-6.3%
20743	Capitol Heights	8,848	11,091	2243	25.4%
20746	Suitland	5,560	5,561	1	0.0%
20747	Dist Heights/ Forestville.	7,915	7,846	(69)	-0.9%
20735	Clinton	10,692	11,034	342	3.2%
20613	Cedarville	1,342	1,371	29	2.2%
20748	Temple Hills	8,148	6,529	(1619)	-19.9%
20745	Oxon Hill	4,775	6,067	1292	27.1%
Total		**58,758**	**60,251**	**1,493**	**2.50%**

Sources: U.S. Census Bureau and Randall Gross/Development Economics.

Bowie and other areas further afield are also becoming employment nodes that would attract residents from the study area.

Key Employers

Housing located within the study area would have relatively good access to thousands of jobs located throughout a broad region extending from Baltimore south into Virginia. US 301 and MD 4, along with the Washington Beltway, provide excellent access to these jobs. Certain employers within Prince George's County have particular pull for attracting workers to the study area because of the relative ease of commuting. Among the key public and private employers are the following:

- U.S. Census Bureau (Suitland and Largo)—4,158 employees
- IRS (Landover)—5,589 employees (MD 202)
- Gaylord National Resort and Convention Center (National Harbor)—2,000 employees

- Prince George's County Government (Upper Marlboro)—1,195 employees
- Joint Base Andrews (Camp Springs)—10,879 employees

Site Potentials

Based on data generated through the Base Realignment and Closure Commission, it is estimated that Andrews AFB will generate demand for about 300 housing units in the market area by 2020. It is determined that the study area could potentially capture 40 to 50 of these units.

Prince George's County government offices within Upper Marlboro employ a total of about 1,200 people (out of about 6,800 countywide). It is determined that the county's employment base will expand by about 300 in Upper Marlboro by 2020, generating demand for 150 housing units. The study area would capture demand for about 30 to 40 of these units under certain conditions where an attractive environment and housing product is created. Induced demand from these two employment generators would therefore total 70 to 90 units. (See Table 24 below.)

Table 24. EMPLOYMENT-RELATED HOUSING POTENTIALS
UPPER MARLBORO STUDY AREA, 2015–2020

Factor	2010-2015	2015-2020	Total
AFB-Related	6,041	7,541	
Growth	1,500	1,500	3,000
Demand	112	149	262
Capture	20	24	44
County-UM	1,195	1,407	
Growth	97	211	309
Demand	48	105	153
Capture	10	26	36
Potentials	30	50	80

Sources: Prince George's County; U.S. Department of Defense; and Randall Gross/Development Economics.

Summary of Market Potentials

Together, these market components will generate demand for 200 to 265 housing units within the study area by 2020. This number was generated under the assumption that an attractive, mixed-use environment would be created that would offer traditional neighborhood development. There is potential for about 30 to 60 rental units and 170 to 200 for-sale (homeowner) units. (See Figure 6.10 on page 115.)

Source	DU Range
Growth-Generated:	110–140
BRAC-Andrews	30–45
County-Related	60–80
Total	**200–265**
Rental	30–60
Owner	170–205

Figure 6.10 Market Potential Summary Table

Housing Product Requirements

Overall, this potential supports a development program, including about 160 to 190 single-family or townhouse units and 40 to 75 multifamily/mixed-use units. The program is oriented to the production of smaller houses in a traditional neighborhood, affordable in the $250,000 to $480,000 range.

Multifamily/Mixed-use 40–75 units

Single-family townhouse 160–190 units

Summary

The residential market analysis forecasted a potential of at least 200 housing units within the study area and adjoining streets by 2020. There are several key markets for this housing, including natural growth within the market area, as well as employment-generated demand relating especially to Joint Base Andrews and county government. If the study area is to capture any of this housing market potential, such efforts would be predicated on creating a traditional neighborhood development with smaller homes with amenity appeal for empty nesters and area workers. In this manner (and if physically possible), there is the opportunity to create a sense of place through mixed-use development and linking small-town housing to the downtown area in support of marketing the Main Street area.

The units would appeal primarily to empty nester households with incomes in the $100,000 to $200,000 range as well as public employees with household incomes in the $60,000 to $150,000 range. Otherwise, housing demand could be captured in a variety of places in the market area, including areas within the proposed MXT north of the study area and MD 725.

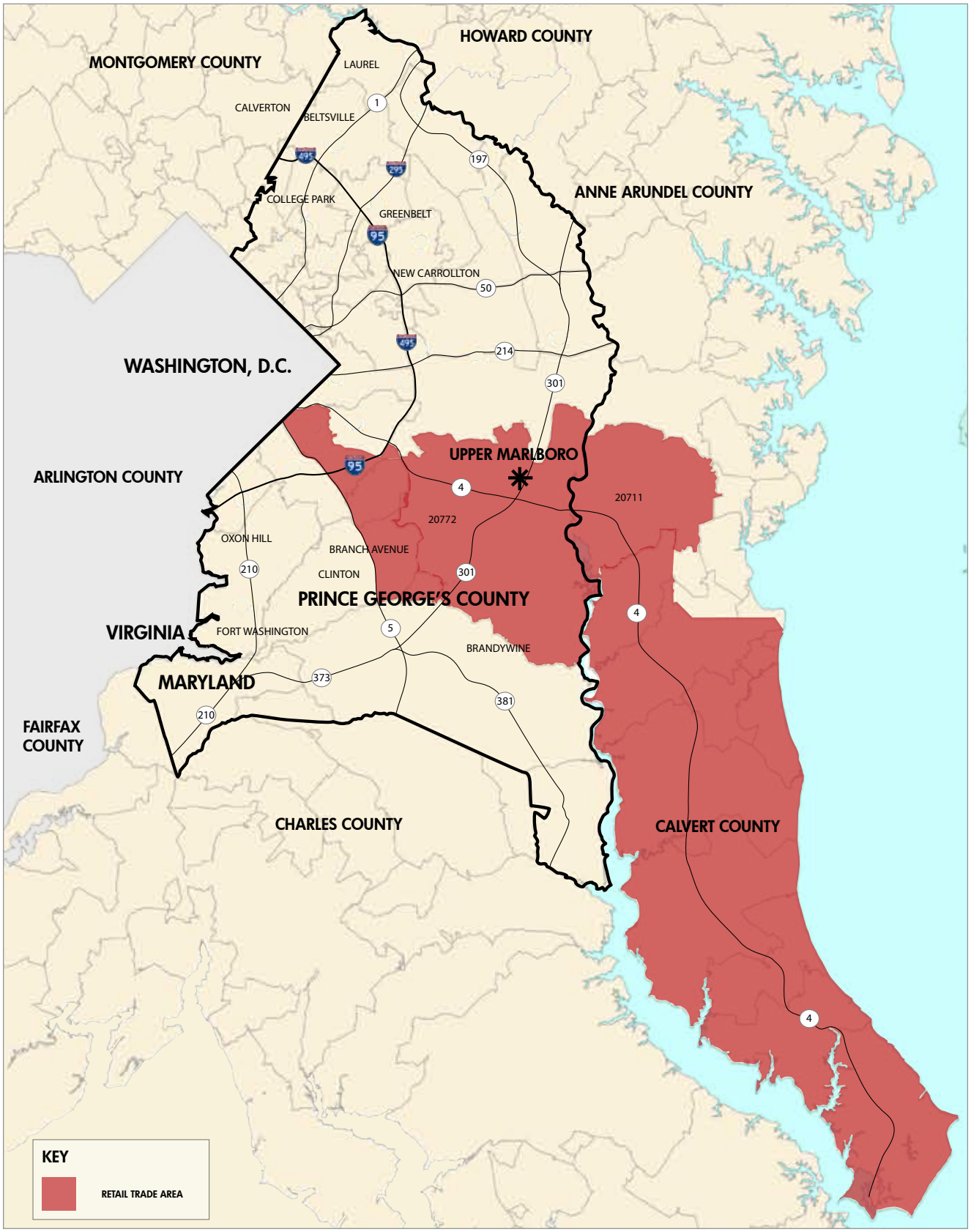
6.5 Retail Market Potential

This section summarizes findings from a retail market analysis, which determined the overall potential for retail goods and services space within the Greater Upper Marlboro study area.

Traffic and Exposure

The study area provides a natural location for retail and consumer-related uses because of its exposure and access to two major regional highways, US 301 and MD 4. Traffic counts along US 301 near Upper Marlboro average 41,000 average daily traffic (ADT) (north) and 36,000 ADT (south). Similarly, MD 4 traffic counts average

Map 6.7 Retail Trade Area



46,000 ADT (west) to 47,000 ADT (east). The traffic data suggests that the travel patterns are generally oriented north on US 301 (with traffic increasing as the road travels north) and west on MD 4.

Retail Trade Area

The Retail Trade Area includes Upper Marlboro and surrounding areas to the east, north, and south; but it also extends south along MD 4 into Calvert County. (See Map. 6.8 on page 116.) There is significant inflow into the trade area generated by traffic along US 301. If the development zone for the MD 4/US 301 intersection were extended east of US 301, then inflow would be increased due to the scale for destination potential. The trade area is disaggregated into two submarkets: Submarket A includes the area surrounding Upper Marlboro to the north, east, and south along US 301; Submarket B includes primarily Calvert County to the south.

Demographic Trends and Forecasts

Key demographic factors were analyzed as a basis for assessing retail potential within the study area. These factors included population, households, average household incomes, and others. Demographic trends and forecasts are discussed below.

Trends

Trade area population and households have increased over the past 20 years since 1990. Within Submarket A population increased by 17,360 or 61.4 percent over the 20-year period to over 46,600. Population in Submarket B increased even more rapidly by 38,650 or 75.2 percent, to over 90,000. The number of households increased even faster, correlated with a decrease in overall household size. Within Submarket A, the number of households increased by 7,200 or 76.1 percent to about 16,600. In Submarket B, households increased by 81.0 percent or 13,760 to 30,750. The increase in households is consistent with the overall level of housing construction during this time.

While there has been demographic growth in the trade area, incomes fell in parts of the area during the 1990s. Between 1990 and 2000 household incomes fell in real terms (after accounting for inflation) by an average of 2.3 percent in Submarket A, the Upper Marlboro area. The decrease in income between 1990 and 2000 may have been related to growth in the number of residents retiring from work during that decade. This temporary decrease may also have been an anomaly. Between 2000 and 2010, incomes in this area returned to a growth pattern, increasing by 1.8 percent during the decade. The submarket remains a relatively affluent area with household incomes of nearly $107,000. In Submarket B, household incomes increased in real terms by 13.4 percent over the 20-year period and are estimated to have reached $103,700. Incomes continued to increase from 2000 through 2010. As such, incomes in the area have bucked national trends, increasing at a time when incomes nationwide have fallen. (See Table 25 on page 118.)

Table 25. DEMOGRAPHIC TRENDS, RETAIL TRADE AREA UPPER MARLBORO, 1990–2010					
Factor	1990	2000	2010	1990–2010 Change	
				Number	Percent
A					
Population	28,271	40,233	45,631	17,360	61.40%
Households	9,422	14,400	16,596	7,174	76.10%
HH Income	$107,339	$104,831	$106,739	($600)	-0.60%
B					
Population	51,372	74,563	90,025	38,653	75.20%
Households	16,986	25,447	30,747	13,761	81.00%
HH Income	$91,488	$95,577	$103,726	$12,238	13.40%
Note: Income expressed in constant 2009 dollars.					
Sources: Claritas, Inc. and Randall Gross/Development Economics.					

Forecasts

Population and households are forecasted to continue increasing throughout the trade area through 2015 and beyond. However, the rate of growth is expected to slow considerably. For example, household growth of about 0.8 percent per year is expected in Submarket A over the next five years, versus 3.8 percent per year between 1990 and 2000. Between 2010 and 2015, population in Submarket A is expected to increase by about 1,800 or 3.9 percent. The area will add about 700 households, and income will increase slightly by about 1.0 percent. Within Submarket B, population and households will each increase by 6.5 percent. Household incomes are expected to increase by about 3.9 percent in Submarket B, overtaking those in Submarket A. (See Table 26 below.)

Table 26. DEMOGRAPHIC FORECASTS, RETAIL TRADE AREA UPPER MARLBORO, 2010–2015				
Factor	2010	2015	2010–2015 Change	
			Number	Percent
A				
Population	45,631	47,409	1,778	3.90%
Households	16,596	17,320	724	4.40%
HH Income	$106,739	$107,710	$971	0.90%
B				
Population	90,025	95,881	5,856	6.50%
Households	30,747	32,748	2,001	6.50%
HH Income	$103,726	$107,807	$4,081	3.90%
Note: Income expressed in constant 2009 dollars.				
Sources: Claritas, Inc. and Randall Gross/Development Economics				

Beyond 2015, MWCOG projections suggest continued growth in the area. Demographic forecasts suggest trade area household growth of nearly 20 percent by 2020.

Trade Area Retail Demand

Trade area retail demand was forecasted in terms of household expenditure potentials for both Submarkets A (Convenience) and B (Commuter). Total personal income (TPI) was forecasted along with the share of income available for the purchase of retail goods, eating and drinking, entertainment, and personal services.

Total Personal Income

Trade area TPI is estimated at nearly $5.0 billion, increasing to $5.4 billion by 2015. Overall, there would be an increase of $435,300,000 or 8.8 percent over the next five years. This increase is generated by the cumulative effect of a growth in both households and household incomes. Within Submarket A, TPI is estimated at $1.7 billion and is expected to increase by 5.3 percent to $1.9 billion. This represents an increase of $94.1 million over the five-year period. Within Submarket B, TPI is $3.2 billion and is expected to increase by 10.7 percent to $3.5 billion for an increase of $341.2 million. Thus, most TPI growth will be experienced in the "destination" commuter region outside of Upper Marlboro. (See Table 27 below.)

Table 27. TPI FORECASTS, RETAIL TRADE AREA PRIMARY TRADE AREAS, 2010-2015

Submarket	TPI (000) 2010	2015	2010–2015 Change	
			Amount	Percent
A (Convenience)	$1,771,441	$1,865,540	$94,099	5.30%
B (Commuter)	$3,189,266	$3,530,465	$341,199	10.70%
Total	**$4,960,707**	**$5,396,005**	**$435,298**	**8.80%**

Notes: Total personal income (TPI) expressed in thousands of constant 2008 dollars.

Source: Randall Gross/Development Economics.

Expenditure Potentials

Retail expenditure potentials total $716.2 million in Submarket A and $1.4 billion in Submarket B. They are expected to increase to $754.2 million and $1.6 billion, respectively by 2015. The largest share of retail expenditures is concentrated in shoppers goods, which includes merchandise for which consumers will comparison shop and travel greater distances to purchase. Convenience goods, such as groceries, include necessities and spur-of-the-moment purchases that are typically made closer to home or during a commute to and from work. (See Table 28 below.)

Table 28. EXPENDITURE POTENTIALS BY PRIMARY RETAIL CATEGORY, RETAIL TRADE AREA 2010–2015

	2010 (000)		2015 (000)	
Category	**A**	**B**	**A**	**B**
Convenience	$189,761	$379,679	$199,841	$420,299
Shoppers Goods	$419,996	$814,475	$442,306	$901,610
Eating & Drinking	$70,966	$142,795	$74,736	$158,072
Entertainment	$8,857	$19,136	$9,328	$21,183
Personal Services	$26,572	$51,028	$27,983	$56,487
Total	**$716,152**	**$1,407,113**	**$754,194**	**$1,557,651**

Source: Randall Gross/Development Economics.

The third largest category of retail expenditures is eating and drinking, which includes fast-food restaurants, full-service restaurants, and drinking establishments. This category has grown rapidly in recent decades along with two-parent working households and diminished time for preparing food. Personal services includes barber shops and beauty salons, along with nail and tanning salons, shoe repair shops, cleaners, and other consumer-serving personal services that are often located within retail spaces. Finally, entertainment represents another group of uses that here includes commercial venues such as cinemas, family entertainment centers, bowling alleys, commercial live theatre, video game businesses, and others that are typically located in retail centers or nodes.

Employee-Generated Demand

There would also be demand for retail goods and services generated by daytime employees within a 5 or 10-minute drive or a short walk from or within the study area. Prince George's County workers are the primary driver for this demand, with an estimated 1,195 employees located within this immediate area, expected to increase to 1,300 by 2015. These workers generate expenditure potential of approximately $1.6 million, increasing to $1.8 million by 2015. Other workers in the immediate area generate another $500,000 to $660,000 in additional demand.

Competitive Framework

There is significant local competition from shopping centers, some of which are located within walking distance to the study area. Regional competition within the broader commutershed is generated primarily from Bowie Town Center, Waldorf, and Dunkirk. These and other competitive nodes were analyzed to assess the study area's relative competitiveness for capturing retail demand within the trade area.

Upper Marlboro Area

There are several retail nodes located near the study area. Just south of the study area across MD 4 are several large retail shopping centers and other retail scattered along US 301. West of the study area is the town center of Upper Marlboro plus neighborhood-serving retail. Just north and east of the study area across MD 725 and US 301 are several isolated retail uses that benefit from exposure to US 301.

Overall, there is about 400,000 square feet of existing retail space within the immediate area surrounding the Town of Upper Marlboro. Rents range up to $22 per square foot. There is relatively little vacancy in this space, other than the two car dealerships that have been excessed on US 301/Crain Highway due to retrenchments in the auto industry. Overall vacancy is estimated at four to five percent (excluding the dealerships), which is the normal target vacancy sought by shopping center managers that allows for some movement within the market. Several of the Upper Marlboro uses and nodes are described below.

Marlboro Crossing. This shopping center, located on the southeast corner of MD 4 and US 301, has 67,975 square feet and is anchored by a Giant Food supermarket. Other tenants include Jerry's Subs & Pizza, Supreme Cleaners, Capitol One Bank, and SunTrust Bank. The center is fully leased.

Marlboro Square. Just south of the study area across MD 4 is Marlboro Square. This center, also fully leased, is anchored by a Food Lion supermarket. Other tenants include A&W, Dollar General, Advanced Auto Parts, Curves, Beauty Outlet, Joe's Pizza/Seafood, Allstate, several personal service businesses and others.

Osborne Shopping Center. Just five minutes south of the study area is yet another supermarket-anchored center, Osborne Shopping Center, with 66,220 square feet. The center was built in 1971 and is anchored by a

Safeway supermarket. Other tenants include CVS Pharmacy, Subway, a Chinese carryout, and various personal service establishments. Bojangles and Exxon occupy out-parcels. There is one, 2,250 square-foot space vacant, yielding a vacancy rate of 3.3 percent.

Other US 301. A roadside motel is located adjacent to the Marlboro Square center. Other commercial retail, office, and accommodation activities within a short drive to the south are the Richards Park Office complex, Case Equipment, Bragg Motel, two BP Gas Stations (east and west), Citgo Gas, and others. Across US 301, east of the study area, is a vacant auto dealership at 5300 Crain Highway. This 46,000 square foot facility is located on 10.7 acres and is being marketed for sale at $7.0 million. At the intersection of MD 725 and US 301/Crain Highway outside of the study area are an Arby's Restaurant, 7-11/Gas Station, Auto America, and Dunkin Donuts. Just east along MD 725 is a small "rural" retail node with Babes Boys Tavern, Bossy's Liquors, and several other commercial uses.

The Town of Upper Marlboro. The town has a historic town center that once served the needs of the town's relatively small population base as well as Prince George's County workers, law firms, and others serving the county courts and government. Today, the town center no longer functions as a retail trading center despite perceptions that it is still the civic heart of the community. The area has a total of about 60 office and retail commercial uses with an estimated 92,000 square feet of ground-floor space. However, there are effectively only 13 retail uses in the town center with about 22,000 square feet or 24 percent of the total. Most of this retail use is oriented to personal services and eating and drinking. There are six restaurants, three of which are full-service establishments. Personal services include locksmiths, shoe repair, cleaners, and hair salons. There is only one shopper's goods store in the town center, CF Brandt Jewelers, located at 14718 Main Street. With less than 1,000 square feet of shopper's goods, the town center does not function as a retail shopping district, even though it serves as the County Seat and the town center.

A large share of the town center commercial space is occupied by 10 bail bonds companies. The preponderance of bail bondsmen and attorneys speaks to the impact of the county courts on the town center business environment, both in positive terms of attracting jobs and business as well as the negative impact that ground-floor offices (especially bail bonds) have on the image of the town as a friendly retail node. Ground-floor offices tend to create "dead" space in a retail district, which thrives on store-front window shopping in a pedestrian-oriented environment. This dead streetscape environment, along with competition and a lack of anchor retail space, may help explain why vacancy is relatively high in the town center. Vacancy is estimated at about 18 percent of the ground-floor commercial space that could otherwise be occupied by retail. If the ground-floor office uses are included, then retail vacancy, or at least displacement, is much higher. The town center is clearly important to the people of Upper Marlboro as a community node, and there is a desire to retain the "small-town" flavor of Main Street. However, the town center could serve the community better by reaching its potential to be the true heart of Upper Marlboro.

Marlborough Village. The Village of Marlborough Shopping Center is located west of the town center on Brown Station Road near the newer suburban areas of town. This 105,359 square-foot center built in 1990 was anchored by a US Best Food supermarket, which has been replaced by the Dutch Village Farmer's Market (held on Thursday, Friday, and Saturdays). Other tenants include Peachez Café, one of the few entertainment venues near Upper Marlboro as well as Caribbean House, Papa Johns, CVS Drugstore, Exxon, and various personal service businesses (cleaners, tanning, barber, etc.). There is also a bail bonds office in the center and three vacant parcels plus second floor space totaling about 43,560 square feet. Overall vacancy is very high at 41.3 percent.

Westphalia. A major, mixed-use development has been proposed for 310 acres west of Upper Marlboro across Pennsylvania Avenue from Joint Base Andrews. The project is part of the larger 479-acre Westphalia Town Center property. At full buildout, this part of the project could have up to 2.2 million square feet of office space, 533,800 square feet of retail, 600 hotel rooms, nearly 890 apartments, 780 townhouses, and nearly 70 single-family homes. The project has been delayed due to financial problems, but new owners plan completion of Phase 1 of the project in 2014. Phase 1 would include townhouses, multifamily and a retail shopping center. While the project would only come on-line near the end of the initial Greater Upper Marlboro plan market horizon, it would begin to impact on the Upper Marlboro site capture at that time. Even so, Upper Marlboro is better placed to capture retail sales generated along the US 301 Corridor and from the retail trade area, which lies mainly to the east and south of the site.

MD 4 / Dunkirk. MD 4/Pennsylvania Avenue has a substantial and growing inventory of competitive retail space. There is significant retail along MD 4/Pennsylvania Avenue closer into the District of Columbia, although there is not much commercial development on MD 4 between Upper Marlboro and the Capital Beltway. However, new retail east and south of the study area in Calvert County has more impact on competition for the commuter market that passes through the area.

Dunkirk Town Center. Dunkirk is a newly-developing and extremely competitive area that captures a significant share of MD 4 commuter traffic that otherwise passes near the study area. There are several large retail centers here in "Dunkirk Town Center," including Dunkirk Marketplace. Walmart operates a large store in the town center along with Giant Food, Mattress Warehouse, Sherwin Williams, and other "big box" stores. Dunkirk Marketplace is anchored by a Safeway supermarket. There is significant other pad and strip center retail within this node with Starbucks, Ledo Pizza, Maggie Moos, 7-11, Wawa, CVS, Sunoco, and other well-known brands. Overall, there is an estimated 550,000 square feet of retail commercial use in this node that effectively captures MD 4 retail commuter sales potential from the study area.

Other MD 4. There is other retail use south along MD 4 such as at Wayson's Corner in Anne Arundel County and further south toward Owings, Prince Frederick, St. Leonard's, Lusby, and Solomons Island. However, the newer Dunkirk center has the greatest impact on destination retail shopping within the study area.

US 301/Waldorf. Waldorf is a major commercial node located along US 301 in Charles County. Overall, the node has nearly 4.0 million square feet of retail space. St. Charles Towne Center is a major retail facility in the area, a regional mall with 930,000 square feet and 130 stores anchored by Macy's, JC Penney, Kohl's, Sears, Dick's Sporting Goods, and AMC Theatres. It is the only enclosed mall in southern Maryland. Many major regional and national retail chains are also represented in the Waldorf area in strip centers, big boxes, or pad sites.

US 301/Bowie. There is significant retail development north of Upper Marlboro along US 301 and in the Bowie area. Although there are scattered retail uses just north of the study area (e.g., Gas N Go, Gateway Tractor, Wawa, and others), most of the retail is concentrated in Bowie. Collington Plaza (anchored by Giant Food), Carver Square, The Home Depot, and other major retail nodes and big box stores are located there along with Bowie Town Center. Altogether, there is an estimated 1.2 million square feet of retail space in the Bowie/US 301 area.

Bowie Town Center. Bowie Town Center (located near MD 50, MD 197, and US 301) is effectively a 684,000-square-foot regional shopping mall that was refined by Simon Property Group into a "Main Street" format with some degree of walkability and small town feel, featuring national brands. Anchors include Macy's, Sears, Famous Footwear, and Old Navy. There are also restaurants and a food court as well as Safeway supermarket and convenience retail.

Largo/Boulevard at the Capital Centre. Another key competitive center is The Boulevard at the Capital Centre, which competes like Bowie Town Center for destination shopping. The centre, like Bowie, is designed in a main-street lifestyle format with a total of about 482,000 square feet of gross leasable area. Anchors include the Magic Johnson Cinemas, Sports Authority, Shoppers World, Pier One Imports, and others. About 64,100 square feet is vacant in 14 spaces, yielding a relatively high vacancy rate of 13.3 percent.

Site Potentials

Based on an analysis of the study area's overall competitiveness within the retail framework, potential site capture was determined and forecasted. For the purpose of this analysis, it was assumed that the entire node, including the study area as well as land on the other four "quadrants" of the MD 4/US 301 interchange, would be developed and marketed proactively as a regional destination commercial and industrial node for the purposes of economic development. Within this context, it was determined that there would be potential to capture about 466,000 square feet of retail demand in this area. However, after netting out existing 167,900 square feet of occupied and 16,800 square feet of vacant retail space in the study area, there would be "warranted" demand for about 280,000 square feet of net new development. This assumes, again, that the entire interchange would be marketed proactively as a regional employment hub.

In this case, there would be warranted demand for about 200,000 square feet of goods stores, 33,000 square feet of convenience, 33,000 square feet of entertainment, 25,000 square feet of eating and drinking, and about 5,000 square feet of personal services, as outlined in Table 29 below.

Table 29. SUMMARY WARRANTED RETAIL DEMAND BY USE UPPER MARLBORO SITE, 2010 AND 2015

Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2010	2015		
Convenience	43,977	42,883	9,897	32,986
Shoppers Goods	287,905	352,749	150,131	202,617
Eating/Drinking	30,624	32,631	7,294	25,337
Entertainment	30,803	32,811	-	32,811
Personal Services	4,507	4,781	600	4,181
Total	**397,816**	**465,855**	**167,922**	**297,933**
Existing Vacant			16,800	
Net New Space				281,133

Source: Randall Gross/Development Economics.

This potential includes demand generated by trade area households, as well as workers in the immediate area and potential inflow from tourists, day-trippers, and others from outside of the trade areas. Table 30 on page 125 provides detail on the site potential by specific type of retail business. For example, the demand for shopper's goods is disaggregated into apparel stores, shoe stores, home furnishings, etc. Discussion of key findings is presented below.

Potential by Type of Store

The analysis forecasted a potential of about 12,400 square feet of grocery store space. This is not enough to support the typical suburban-format floor plate for supermarkets. Part of the reason that there is insufficient

demand for a grocery store is that three supermarkets are already located within a five-minute drive of the study area, and others are not far away. Nevertheless, this potential suggests an opportunity for smaller food stores or for groceries incorporated into other business formats. (See Table 30 on page 125.)

There is also significant potential for more gas stations and convenience stores, including health and personal care (pharmacies); although, this demand could also be absorbed by competitive stores already located in the surrounding areas if not captured on-site. There is potential for destination anchor stores such as department stores or big box general merchandise retailers. The problem is that chains like Wal-Mart and Target already have superstores located nearby, such as in Bowie and Dunkirk. Therefore, attracting a general merchandise retailer may require recruiting a new brand to the county. The other challenge is that the demand, even at 126,000 square feet, is still less than required to support a typical Wal-Mart or Target superstore.

Other goods demand exists in the study area for sporting goods stores, automobile dealers, automotive parts retailers, hardware/building/home supply, garden supply, apparel, and other uses. In the case of hardware, the "excess" demand of 8,400 square feet is likely to be absorbed by the existing Home Depot, which will generate higher-than-average sales per square foot. On the other hand, the study area does have a concentration of home and building supply activities that help to generate a destination draw for this type of merchandise. There may be opportunities to expand on this theme to create more of a regional hub, including not only retail but also manufacturing and distribution of building supplies.

A potential also exists for additional eating and drinking establishments, entertainment, and personal services. There is already an underserved market for entertainment, particularly for Calvert County and areas surrounding Upper Marlboro. If a destination draw can be achieved through pro-active marketing and development of the interchange, then there are more opportunities to attract restaurants and entertainment into the destination.

Recommended Business Mix

Based on the findings of the market analysis, a retail business mix is recommended for the study area that builds on its competitive advantages. The recommended mix is disaggregated into two distinct opportunities, both of which build on a regional destination draw but for distinct market niches.

"Interchange-Oriented Node"

The first is a highway-oriented retail business mix that would be recruited and developed in the study area as part of a broader marketing and development strategy for the interchange. The primary market would include those households within the commuter-shed as well as local residents. In this 222,800 square-foot component, there would be a recruitment effort to attract a general merchandise / department store that would anchor redevelopment. For this purpose, the 147,000-square-foot store would also incorporate convenience uses, including gas and groceries. Other uses would include a pharmacy, convenience, clothing and accessories, auto supply, fast-food restaurants, and an automobile dealership. There is still demand for one auto dealer in this area even though two have closed (as they have nationwide) due in part to corporate-wide restructuring. There is also the opportunity here for an entertainment and/or recreation venue, such as a family entertainment center, for example Dave & Busters, or a horse-themed entertainment venue that would complement Upper Marlboro's existing Showplace Arena Equestrian Center. (See Table 31 on page 127.)

Table 30. WARRANTED TOTAL RETAIL DEMAND BY USE UPPER MARLBORO SITE 2010 & 2015				
Type of Good	**Gross Demand (Sq. Ft.)**		**Existing Uses**	**Warranted Demand**
	2010	**2015**		
Convenience				
Grocery	11,389	12,387	-	12,387
Convenience	1,399	1,507	-	1,507
Specialty Food	1,724	1,611	1,176	435
Health/PersCare	9,593	8,702	-	8,702
Gas/Convenience	15,164	14,035	4,236	9,799
MiscConv	4,709	4,641	4,485	156
Subtotal	**43,977**	**42,883**	**9,897**	**32,986**
Shoppers' Goods				
Apparel	2,303	3,793	-	3,793
Accessories	62	104	-	104
Jewelry	414	724	-	724
Shoes	411	603	-	603
Furniture	3,534	3,769	-	3,769
Home Furnishings	2,222	2,367	-	2,367
Appliances	962	1,022	530	492
Hardware/Bldg/ Home	121,116	152,963	144,595	8,368
GardenSupply	3,528	4,038	-	4,038
GenMdse/Dept	99,246	126,398	-	126,398
AutoDealers	34,524	36,366	1,032	35,334
AutoSupply	5,785	6,075	2,774	3,301
Electronics/Comp	1,697	1,782	-	1,782
Books/Music	981	1,031	-	1,031
Camera/Photo	108	114	-	114
Gift/Novelty	724	764	-	764
Hobby/Toy/Game	2,128	2,232	-	2,232
Luggage/Leather	187	199	-	199
Office/Stationary	2,641	2,794	1,200	1,594
Sewing/Piece	662	697	-	697
SportingGoods	4,669	4,915	-	4,915
Subtotal	**287,905**	**352,749**	**150,131**	**202,617**
Dining & Entertainment				
Restaurant-FF	16,455	17,528	7,294	10,234
Restaurant-FS	13,085	13,947	-	13,947
DrinkingEstablshmt	1,084	1,156	-	1,156
Entertainment	30,803	32,811	-	32,811
Subtotal	**61,427**	**65,442**	**7,294**	**58,148**

Table 30. WARRANTED TOTAL RETAIL DEMAND BY USE UPPER MARLBORO SITE 2010 & 2015				
Type of Good	Gross Demand (Sq. Ft.)		Existing Uses	Warranted Demand
	2010	2015		
Personal Services	**4,507**	**4,781**	**600**	**4,181**
Total	**397,816**	**465,855**	**167,922**	**297,933**
Existing Vacant			16,800	
Net New Space				281,133
Source: Randall Gross/Development Economics.				

Historic Town-Center Oriented Node

The other potential component would be a strengthening and expansion of the existing historic town center. In this scenario, 45,000 to 50,000 square feet of retail is accommodated both within existing buildings in the town core and extends into the study area along a main street corridor. Here, the marketing would focus on creating destination potential by strengthening the character and appeal of Upper Marlboro as a small town main street community. If anchored and proactively marketed, the town center would then be in a position to attract restaurants and more goods stores such as sporting goods that further complement and feed off of the Show Place Arena Equestrian Center and the rural character of the community as the County Seat. Other retail uses would include specialty shops such as for hobbies, home furnishings and garden supply, gifts, and antiques. The home supply theme is again important as the study area already displays a concentration of this use.

Interface between the Two Strategies

The interchange and town center strategies can both be employed effectively to maximize retail potential and help revitalize the town. Development of a large general merchandise store often has the effect of attracting consumers that would not otherwise have visited the area. Similarly, the town center strategy helps to build a destination market among day-trippers and others from outside of the normal trade area. Thus, the two strategies can be complementary if designed appropriately through an integrated approach.

Should the interchange strategy not be viable, then the overall demand is likely to fall to about 35,000 square feet by 2015 and perhaps up to 60,000 square feet by 2020. Ultimately, the best approach for maximizing potential is a heritage-based destination retail strategy that builds on the community's history as well as industrial heritage within the study area. Ideally, a share of this retail demand would be captured within or adjacent to the town center itself, leveraged by adjacent commercial use within the study area. Thus, there would have to be a direct physical connection between the town center and "industrial heritage" commercial use to make the "heritage" marketing strategy generate the kind of destination potential that would support the smaller retailers and restaurants that could serve local needs.

(cont'd)

Table 31. RECOMMENDED BUSINESS MIX UPPER MARLBORO SITE	
Type of Business	**Square Feet**
Interchange-Oriented	
GM Department Store/Gas/Grocery	147,400
Pharmacy	8,500
Convenience	1,500
Clothing & Accessories	3,700
Automotive Dealer (e.g., used)	35,000
Auto Supply	3,500
Restaurant/Fast Food	10,000
Family Entertainment Venue*	30,000
Subtotal (Net of Vacant Space)	222,800
Historic Town Center-Oriented	
Furniture/Home Furnishings/Antiques	6,000
Other Specialty Home Supply	6,500
Garden/Farm Supply	4,000
Computer/Electronics	1,500
Hobby/Toy/Game Shop	2,200
Expanded Office Supply (total)	2,700
Sporting Goods Store	5,000
Gift/Novelties/Books	2,000
Restaurants/Full Service	12,000
Personal Services	4,000
Subtotal	45,900
Total	**268,700**
*Note: Ideally located in Town Center but would require subsidy.	
Source: Randall Gross/Development Economics.	

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