



Staff Report

MEETING DATE: December 17, 2025

TO: Summit County Housing Authority

SUBJECT: Utah Resource and Infrastructure Housing Capacity Analysis

STAFF/PRESENTERS: Jeff Jones
jjones@summitcountyutah.gov

BACKGROUND INFORMATION

Text in italics has been taken from the Capacity Analysis directly.

Envision Utah, in coordination with the Governor's Office for Economic Development, developed the Utah Resource and Infrastructure Housing Capacity Analysis report, included in the agenda packet for today's meeting.

"House Bill 2 in 2024 authorized the Governor's Office of Economic Opportunity (GOEO) to analyze housing capacity by evaluating land availability, infrastructure constraints, and market projections across Utah. Envision Utah and RCLCO Real Estate Consultants were selected to complete the analysis."

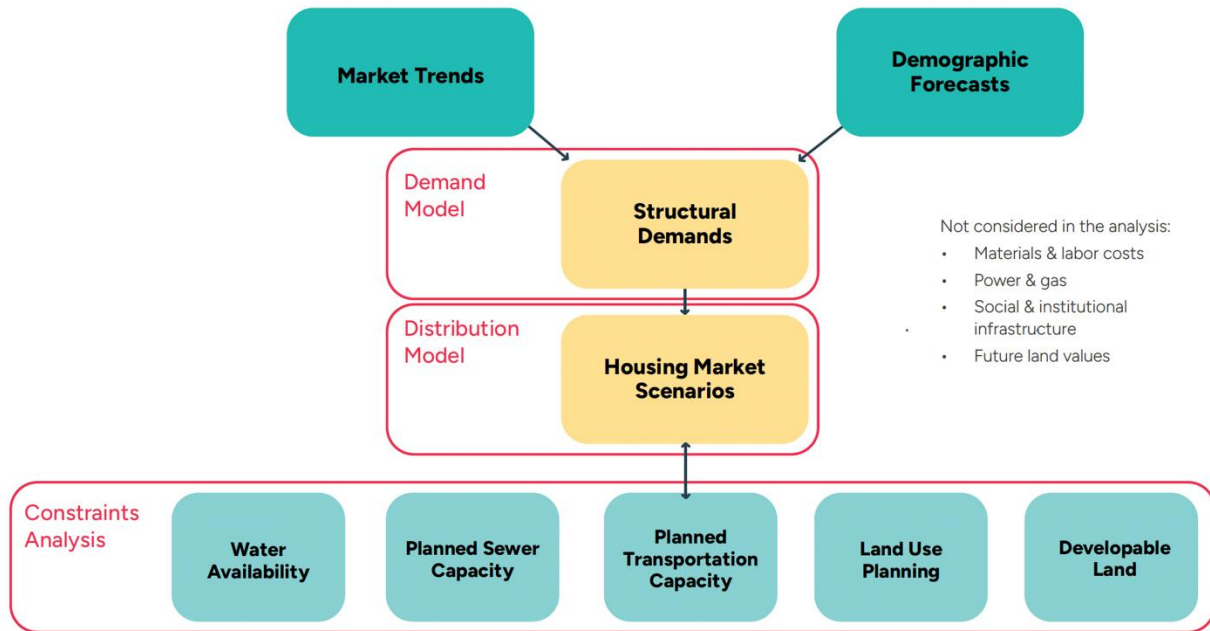
The assumption is that this capacity report will be used to identify areas most suitable for growth and *may* be used to set target numbers or even quotas.

REPORT SUMMARY

"This Housing Capacity Analysis clarifies future housing needs in high-growth markets by estimating future housing demand based on demographic and market forces. It also estimates regional capacity for new housing based on land and water availability, transportation and wastewater planning, and local land use regulations, and assesses the alignment of these variables with regional housing needs."

The following visual depicts the demand and distribution modeling approach used to estimate residential demand through 2055.

Demand and Distribution Modeling Approach



The report identifies estimated available land by six “market types”:

Market Type	Current Conditions	Land Available for Housing Development
Transit-Adjacent	Land area within 0.5 miles of passenger rail stations or 0.25 miles from Bus Rapid Transit stations (current and planned + funded stations only).	Redevelopment Vacant land
Infill	Census tracts dominated by current residential or other urban land uses.	Redevelopment Vacant land
Greenfield	Tracts dominated by agricultural or vacant land.	Vacant land
Priority Seasonal	Tracts with moderate to high rates of non-primary residences. ⁵	Vacant land
Excluded Resort	Tracts with high to very high rates of non-primary residences.	N/A ⁶
Commercial/Industrial	Tracts dominated by commercial and industrial use with little housing.	N/A ⁷

The report further identifies three markets for new housing to be built and comments on the potential barriers of each market:

- Infill: within existing cities and towns

- Potential barriers include planning and zoning constraints and willingness to redevelop.
 - *“Concerns regarding community character and displacement sometimes complicate market-aligned redevelopment efforts...”*
- Greenfield: on previously vacant or agricultural land
 - Potential barriers include lack of transportation infrastructure, availability of water, lack of sewer treatment capacity, and planned housing capacity in these areas (they are generally zoned lower density).
 - *“...may compete with agriculture, open space preservation, and water conservation goals.”*
 - The report identifies the following Average Greenfield Densities based on the areas that were research:

Average Greenfield Densities			
Unit Type	Share of Greenfield Housing Demand	Share of Residential Land Area	Typical Net Density (units/acre)
Single-Family Detached	61%	87%	2.8-3.3
Single-Family Attached	30%	11%	11.5-14.5
Multifamily	9%	1.4%	27.1-31.2

- In the Snyderville Basin, the underlying zoning is 1 unit per 20 acres. In Eastern Summit County, the highest possible density is 1 unit per 2.5 acres, though most of the area is zoned 1 unit per 80 acres.
- Transit-adjacent: near public transportation infrastructure
 - Potential barriers include the availability of land for new or redevelopment near transit.

Availability of water was identified as a barrier that would apply to all market types. The vast majority of consumptive water use (that is water that is not available to return to rivers, lakes, or groundwater) is residential, outdoor water use.

The report also identifies five areas for future study:

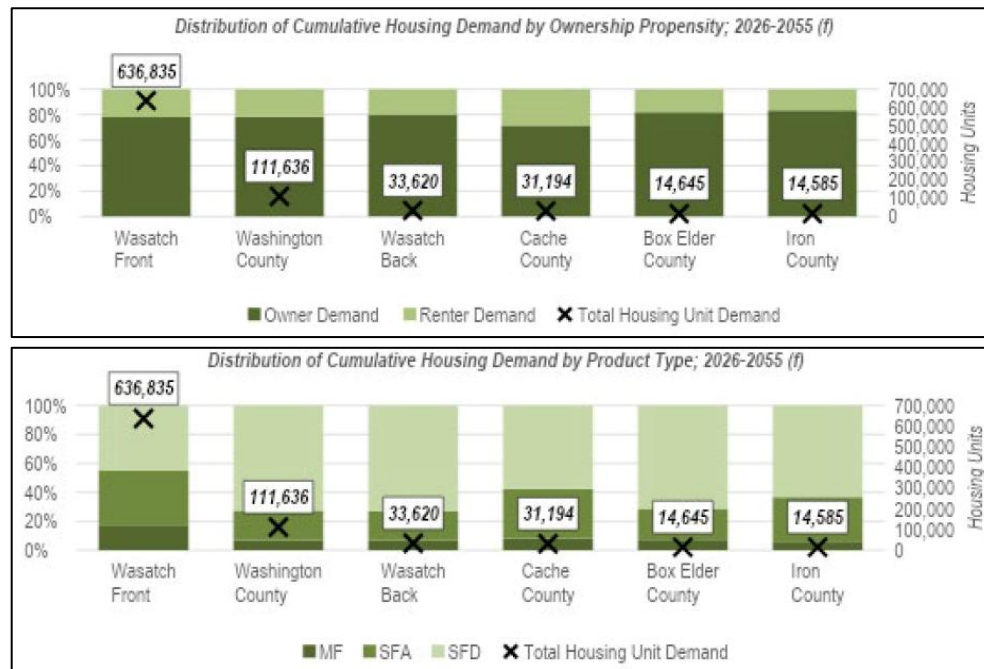
1. Better tracking of redevelopment and its role in housing growth.
2. Detailed water study and scenario planning.

3. Quantified impacts of second homes and short-term rentals on housing supply and prices.
4. Technical support for future centers planning.
5. Regional inventories of planned sewer capacity.

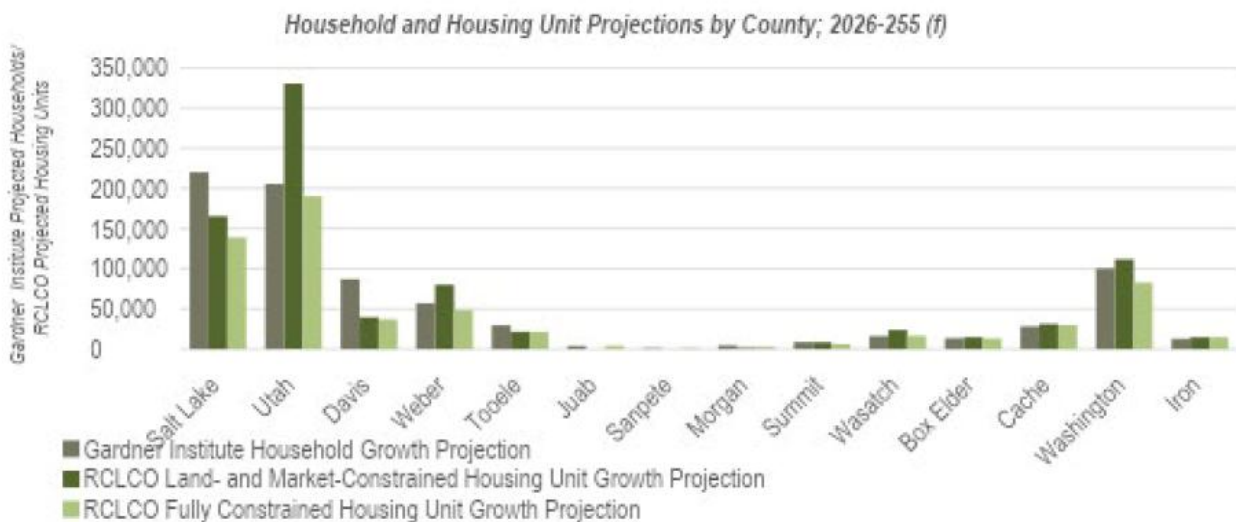
SUMMARY OF THE APPENDICES

1. Technical Appendix: Demand and Distribution Modeling

- RCLCO forecasted demand across six regions: Wasatch Front, Wasatch Back, Box Elder County, Cache County, Iron County, and Washington County. Two, of many, graphs are included below.



- Two different models were used
 - Land and market constrained housing unit growth projection:
 - *"The land- and market-constrained projection illustrates how growth might unfold if driven purely by market dynamics and land availability."*
 - Fully constrained housing unit growth projection:
 - *"... this scenario suggests that layering in policy (zoning/density) and infrastructure (water, sewer, and transportation) constraints produces significant housing shortfalls across the state, underscoring the degree to which physical and policy barriers could prevent future housing demand from being met."*

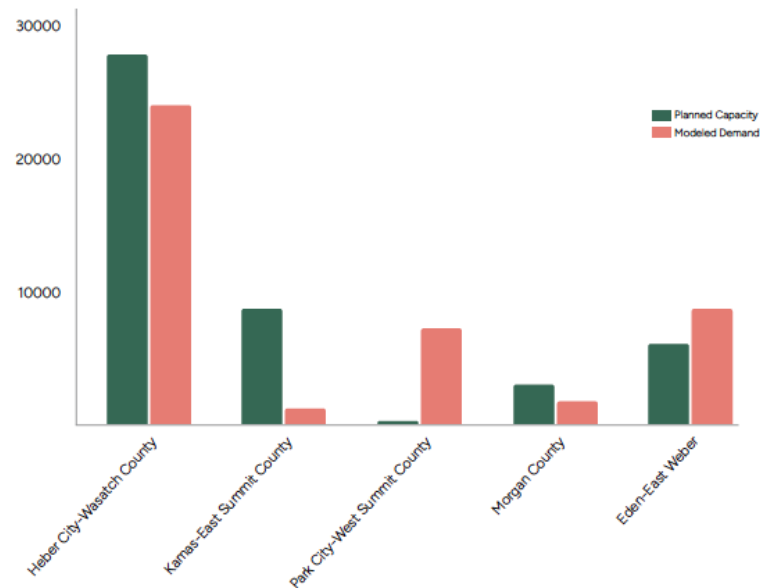


2. Appendix B: Constraints, Assumptions, and Results

“To complete the housing capacity analysis, Envision Utah modeled how resource, infrastructure, and policy constraints might shape regional housing capacity through 2055. Land availability, transportation planning, land use planning and zoning, water supply, and sewer treatment were considered. The findings demonstrate that while Utah has significant potential for new housing creation, constraints such as zoning limits, water availability, and sewer capacity, if left unmitigated, may result in substantial gaps between projected household growth and future housing development.”

- Land Availability:
 - Land with physical constraints (such as steep slopes and wetlands) and under ownership or administrative constraints (such as parks and certain public lands) were excluded as “undevelopable.”
 - Land considered available for future development was classified as ‘vacant’ and ‘redevelopment’. Agricultural land was included in vacant.
 - Land availability was used to develop the baseline housing distribution scenario that was then refined with additional constraints.
 - Note: Summit County was identified as having 0 infill acres and 0 transit adjacent acres.
- Transportation Planning:
 - Used the Utah Unified Transportation Plan for identifying planned public transportation stops and routes.
 - This plan covers a different number of years and the traffic analysis zones don’t align perfectly with the market types this report used.
- Planning and Zoning:

- In the Wasatch Front and Back, maximum dwelling units per acre were used to estimate capacity. These maximums are not always accurate to what will be proposed or approved.



- Water Availability:
 - Data was taken from the 2021 State Water Plan, so deferring to more detailed and local plans is suggested.
- Sewer Treatment:
 - Total limitations to a sewer system (such as capacity) were not fully captured in this analysis.
- Fully Constrained Scenario:

Submarket	Greenfield	Infill	Transit-Adjacent	Priority Seasonal
Bountiful - South Davis County		★	▪	
Box Elder County	▲	★		
Cache County	▲	▪		
Eagle Mountain-Saratoga Springs	▲	▪		
Eden - East Weber County				▲
Goshen Valley	▲			
Heber City - Wasatch County	▲	▪		▲
Iron County	◆	◆		
Juab County	▲			
Kamas - East Summit County	▲			▲
Layton - North Davis County	★	▪	▪	
Lehi-Provo	★	★	▪	
Morgan County	★			
Northeast Salt Lake County	★	★	▪	
Northwest Salt Lake County	★	▪	▪	
Ogden - West Weber County	★	▪	▪	
Park City - West Summit County	▲			★
Sanpete County	▲			
Southeast Salt Lake County	★	★	▪	
Southwest Salt Lake County	★	★	▪	
Springville-Payson	▲	▪	▪	
Tooele County	●	●		
Washington County	●	●		●

Legend	
Planning & Zoning	★
Redevelopment	▪
Transportation	▲
Sewer	◆
Water	●

- *“A “fully constrained” scenario based on the most limiting capacity constraint in each market type and submarket was developed to illustrate the potential housing supply impacts if constraints aren’t addressed.”*
Only the most limiting constraint is shown in the table above.

REVIEW DIRECTIONS

1. Review the Utah Resource and Infrastructure Housing Capacity Analysis report.
2. List any questions you may have.
3. Though the information for Summit County specifically is relatively limited, what can be taken from the Utah Resource and Infrastructure Housing Capacity Analysis report?
4. What suggestions from the report should be implemented by the Housing Authority?