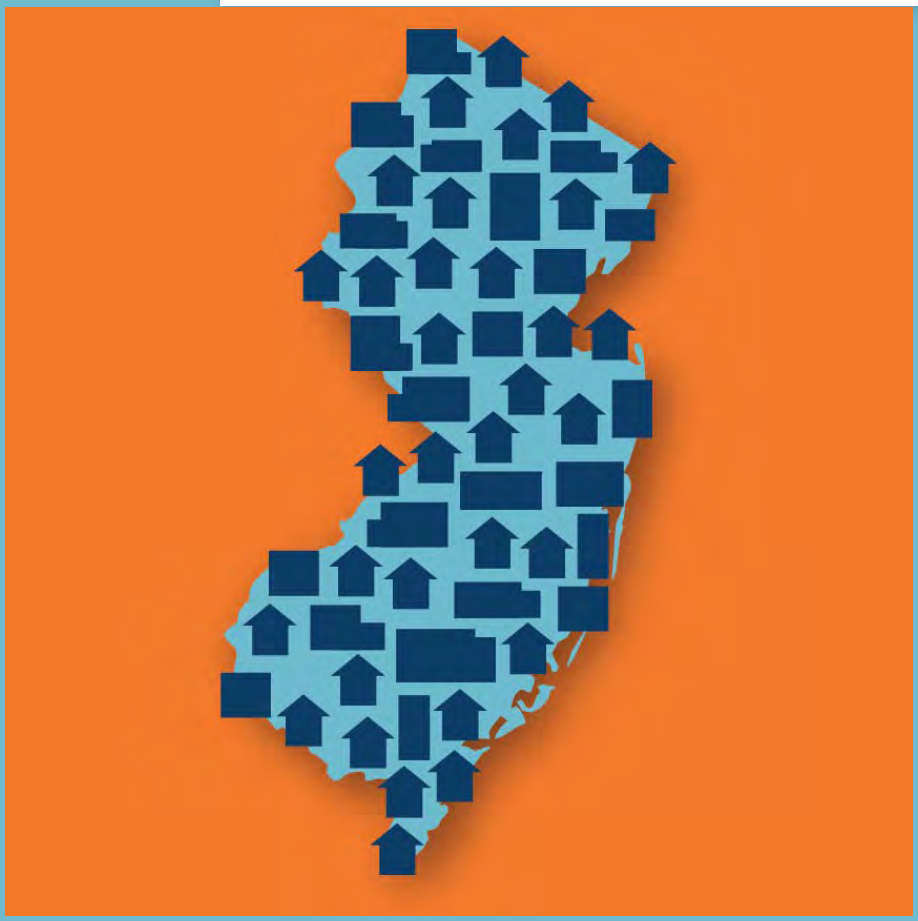
Jul 2025

Mapping New Jersey's Growth

Residential Development Trends and the State Development and Redevelopment Plan

This analysis of residential development trends highlights significant changes driven by the 2001 State Plan. As New Jersey advances in updating its new State Plan, these findings offer valuable insights.

Visit rpa.org/work/reports for web-based report including interactive charts, footnotes, and full appendix/methodology section.



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New Jersey is home to a diverse and vibrant array of communities. The "Garden State" also features abundant natural open spaces and historically significant sites. Its proximity to major metropolitan employment centers has significantly enhanced the economic prosperity of many residents. These qualities make New Jersey an attractive place to live, work, and enjoy recreational activities.

However, as one of the most densely populated states, New Jersey faces substantial challenges in balancing long-term growth, improving infrastructure, and preserving natural resources. A key factor in addressing these challenges has been the state's ability to coordinate efforts across multiple municipal boundaries and agency jurisdictions.

Two important initiatives—the New Jersey State Development and Redevelopment Plan and the Fair Share Housing Framework—play a crucial role in guiding sustainable growth with equitable outcomes. Together, they serve as long-term guiding frameworks for safeguarding environmentally sensitive land, promoting more equitable and sustainable development, and mandating fair housing obligations across municipal and regional boundaries. In aggregate, and during the past two decades, they have positively influenced growth in smart growth areas and limited the loss of open space and farmland. The initiatives helped determine where and how development occurred, ensuring that communities today have access to opportunities, affordable housing, natural resources, and an enhanced quality of life.

Despite progress in implementing this framework, New Jersey is currently experiencing a significant housing shortage, which has led to rising housing costs that are outpacing household incomes. Over the past decade, vacancy rates have consistently decreased, indicating worsening conditions in the housing market. As of 2023, rental vacancies are around 3%, while owner-occupied homes show an even lower vacancy rate of

just 0.5%.[00] These challenges have a disproportionate impact on lower-income households. According to the National Low Income Housing Coalition, the state is short by over 200,000 affordable rental units.

In December 2024, the New Jersey State Planning Commission released the preliminary version of the New Jersey State Development and Redevelopment Plan (also known as the "SDRP" or "the Plan"), which also marks 23 years since the prior Plan adoption in 2001.[00] A primary objective of the Plan has been to establish the state's participatory role in guiding the vision for future growth and aligning resources accordingly.[00]

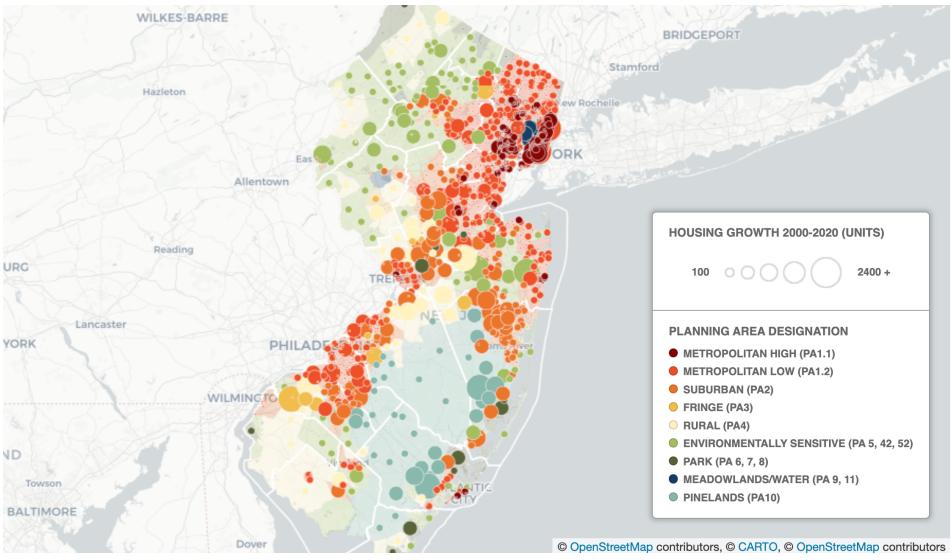
As the updated 2024 New Jersey State Development and Redevelopment Plan aims to provide a coordinated framework for planning and infrastructure investment over the next 25 years, it is crucial to assess the extent to which the vision outlined in the 2001 Plan has been realized over the past two decades. Equally important is recognizing how the 2024 Updated Plan can more directly address the escalating challenges of climate change and equitable development for historically underserved communities—two priorities that were not central to the policies outlined in the 2001 Plan.[00]

The Regional Plan Association (RPA) has conducted a retrospective analysis of the distribution and trends of residential development in New Jersey from 1940 to 2020, assessing the extent to which these patterns align with the goals and objectives of the 2001 State Plan. This includes examining how development has unfolded in relation to transit infrastructure, flood-prone areas, and evolving housing needs.

As New Jersey confronts ongoing pressures related to housing affordability, climate change, and unequal access to opportunities, the modernized goals and policies outlined will play a central role in shaping the state's trajectory over the coming decades. This analysis, grounded in an understanding of both historical development patterns and evolving policy needs, aims to provide insights about the efficacy and trajectory of statewide coordinated planning efforts in New Jersey.

Incremental housing units between 2000 and 2020 by Planning Area

Map by RPA based on Historical Housing Unit and Urbanization Database (HHUUD) and the 2001 State Development and Redevelopment Plan (SDRP) policy map designations. For clarity purposes, the legend consolidates environmentally sensitive areas, parks, meadowlands/and water areas into aggregated categories.



Key Findings

Background

- The adopted 2001 Plan is the most recent iteration of the New Jersey State Development and Redevelopment Plan. A preliminary draft of the updated 2024 NJ State Plan was recently published in December 2024 and is currently undergoing the cross-acceptance process.
- Under the 2001 Plan, Statewide residential development is promoted in "smart growth" areas, primarily represented by the Metropolitan (PA1) and Suburban (PA2) Planning Areas, as well as their designated Centers.
- Although the provisions under the State Plan are not fully enforceable, they serve as a statewide forward-looking blueprint for guiding growth and conservation in New Jersey's geographically diverse regions. The New Jersey State Development and Redevelopment Plan does not supersede local land use regulations.
- The voluntary Municipal Plan Endorsement process allows municipalities to receive state recognition for their master plans and land use regulations, ensuring alignment with the State Plan. This endorsement enhances coordination among planning efforts and offers incentives, such as priority access to infrastructure funding and technical assistance.

Housing Production

- Following the 2001 Plan, the state experienced a shift toward more compact housing development, characterized by a larger share of new stock in Metropolitan areas and an increase in multifamily building types. This has reduced the sprawling nature of development and limited the loss of open space and farmland, consistent with the principles of "smart growth". However, the period from 2000 to 2020 saw a decrease of 173,400 incremental housing units across the state compared to the 1980s and 1990s, marking a 28% reduction. This decline is likely attributed to a 15-year gap in the enforcement of Mount Laurel obligations from 2000 to 2015, which has exacerbated issues related to housing affordability[00]

- During the 2000-2020 period, Metropolitan Areas (PA1) added 232,000 units, representing 52% of the total statewide growth, far more than in any other planning area. In Suburban Areas (PA2), new unit production declined sharply, from 184,000 (29% of total new units) between 1980 and 2000 to 79,000 (17% of total new units). The lower production in other planning areas led to reduced growth across the state as a whole.[00]

- The shifts between Planning Areas are reflected in the types of housing being built. Multifamily housing (five or more units) saw a significant increase from 78,500 units in the 1980s and 1990s (13% of the total new stock during that period) to 136,200 units in the 2000s and 2020 (29% of the new stock). While new single-family homes continue to dominate, with 224,600 units built between 2000 and 2020 (accounting for 48% of the new stock), this represents a decline from the 364,000 units built in the 1980s and 1990s (which accounted for 59% of total new units during that period).[00]

Housing Affordability

- As of 2023, both rental and homeowner vacancy rates are at their lowest levels in over a decade. As a result of housing underproduction, New Jersey's rental vacancy rate has dropped from 7.5% in 2010 to 3% in 2023, while the homeowner vacancy rate has fallen from 2% to 0.5% over the same period.[00]

- Resulting from these tight market conditions, the statewide average home value has more than tripled since 2000 and nearly doubled since 2010, excluding prospective buyers from the benefits of homeownership. Since 2010, New Jersey's typical home value increased from $313,000 to $564,000, representing a rise of $250,650.[00]

- Rents have also soared across all market segments. Of the five major cities, Jersey City has ranked the highest over the past decade, closely followed by Toms River, with an average of $3,236 and $3,094, respectively. Jersey City's typical observed market rent is nearly 60% higher than the national average ($2,024). While the average rent in Newark remains comparatively more affordable, it has increased by 100% from $1,104 in 2015 to $2,215 today.[00]

Housing and Transit

- Approximately 1.7 million housing units throughout the state are located near transit, including both rail and bus lines. This represents 45% of the state's total stock. Over 1.5 million housing units located in proximity to transit are also situated within Metropolitan Areas (nearly 90% of the total within the transit zone).[00]

- Between 2000 and 2020, the state added approximately 176,000 housing units in areas close to transit stops. Such growth represents 39% of the statewide housing increase during that period. This also represents a substantial increase compared to the growth observed before the adoption of the 2001 Plan. During the 1980s and 1990s, the state added approximately 128,000 units in areas near transit, 21% of the total statewide increment during that period.[00]

- While almost half of New Jersey's statewide housing stock is located near a transit stop, most of it is situated in areas that lack the necessary residential density and ridership to support transit service. Less than 828,000 units, representing 22% of the total statewide housing stock, are located in areas with sufficient density to sustain bus service. Even in areas close to transit, approximately 963,000 units (56% of the total stock within the transit zone) are situated in areas that lack the density to support bus service.[00]

Housing and Coastal Flooding

- As of 2020, approximately 346,100 units are exposed to coastal storm surge flooding that could result from a Category 2 Hurricane, closely matching the number of units damaged or destroyed by Hurricane Sandy in 2012. Approximately 112,000 of such units (33% of the total stock exposed) are located in Metropolitan areas. Another 94,800 units (27% of total stock exposed) are situated in Environmentally Sensitive areas, including 58,200 units (17% of total stock exposed) within Barrier Island areas.[00]

- Between 2000 and 2020, approximately 52,000 new units were built in areas exposed to coastal flooding. Most of the new stock exposed to coastal flooding is situated in Metropolitan Areas (PA1), with almost 14,000 new units or 27% of the new stock at risk. An additional 7,100 units in Suburban areas (PA2) were built in locations exposed to flooding (14% of the new stock exposed). Fringe and Rural areas (PA 3 & 4) added 10,400 new units, corresponding to 20% of the new stock exposed. Approximately 8,500 new units in Environmentally Sensitive locations

(PA 5, 42, and 52) were built in areas at risk (17% of new stock exposed), including 4,000 in Barrier Islands.[00]

Recommendations

- Housing, transportation, and resiliency goals under the new updated State Plan must acknowledge needs that are both regional in scale and dynamic in time. Efforts to minimize flood risk and address the housing shortage should consider local flood exposure conditions and attributes that favor "smart growth" through compact, walkable, and transit-oriented development, leveraging both urban mass transit and the state's extensive suburban rail network.

- To achieve the recommendation above, the new plan and related Policy Map should develop a more nuanced framework to integrate Planning Areas and corresponding policies. As currently defined, these are too broad to capture the distinctions between the issue areas examined in this report. Metropolitan Planning Areas (PA1) in particular require policies that better reflect distinctions between residential density, transit proximity, and flood risk.

Background

Historical Planning Context (1930-2025)

State governments in the United States have historically not seen statewide planning as one of their essential functions, with only a limited number of states engaging proactively in such initiatives. New Jersey, contrasting its neighbors in New York and Connecticut, possesses a notable tradition of statewide planning that spans nearly a century.[00]

- In 1934, the State Planning Board released the New Jersey State Plan, which documented existing conditions like hospitals, schools, and roads. It included a map titled "Future Land Utilization," highlighting urban areas with over 500 people per square mile, probable urban expansion zones, and agricultural land. This plan was influenced by the 1929 Regional Plan for New York and Its Environs, produced by the Regional Plan Association.

- In 1950, the New Jersey State Department of Conservation and Economic Development created a Development Plan for the state. In 1969, the Hackensack Meadowlands Reclamation and Development Act established the Hackensack Meadowlands Development Commission, now known as the New Jersey

Sports and Exposition Authority. This commission was formed to oversee the Hackensack Meadowlands District.

- To address rapid growth and its environmental impacts, New Jersey enacted the Coastal Area Facility Review Act in 1973. This act granted the Department of Environmental Protection the authority to regulate development in designated coastal areas.

- By 1980, the Division of State and Regional Planning issued the State Development Guide Plan, which included maps categorizing land into various designations such as "growth areas," "limited growth areas," and "conservation areas." This plan marked the establishment of New Jersey's second regional planning entity.

By 1985, the New Jersey Legislature had made significant progress by enacting two complementary pieces of legislation: the Fair Housing Act and the State Planning Act. These laws introduced the important notion of well-defined statewide land use planning objectives, which are crucial for promoting effective growth within the state. Moreover, they underscore the state's commitment to fulfilling its constitutional responsibility to accommodate the housing needs of all New Jersey residents, including those from low- and moderate-income backgrounds.

The New Jersey State Planning Act was established in recognition of the need to coordinate land-use planning among state agencies and different levels of government due to the deterioration of quality of life and resources, and the patterns that were accelerating sprawl, consumptive development, uncoordinated growth, and degradation of resources.[00 00]

"...conserve its natural resources, revitalize its urban centers, protect the quality of its environment, and provide needed housing and adequate public services at a reasonable cost while promoting beneficial economic growth, development and renewal"

(N.J.S.A. 52:18A-196)

Under the State Planning Act, the newly formed State Planning Commission would be responsible for formulating a State Development and Redevelopment Plan (SDRP) and facilitating a statewide, collaborative planning process, called Cross-acceptance. This process highlights that statewide planning is not a siloed journey but one that solicits a negotiation process and participation of all levels of government not a siloed journey, but one that solicits a negotiation process and participation of all levels of government and the public in the review and preparation of the final draft of the State Plan. 00

One of the key mechanisms to implement the State Plan at the local level is the voluntary Municipal Plan Endorsement process. Through this process, municipalities can apply for state recognition that their local master plans and land use regulations align with the goals, policies, and spatial framework of the State Plan. Endorsement strengthens the coordination between state, county, and local planning, and provides municipalities with access to certain incentives, such as priority consideration for infrastructure funding and technical assistance. It also reinforces the collaborative intent of the Cross-acceptance process by ensuring local plans remain consistent with regional and statewide objectives.

"...a process of comparison of planning policies among governmental levels with the purpose of attaining compatibility between local, county, and State plans. The process is designed to result in a written statement specifying areas of agreement or disagreement and areas requiring modification by parties to the cross-acceptance."

(N.J.S.A. 18A-202b.)

Although the provisions under the State Plan would not be mandated, they would serve as a statewide forward-looking blueprint for guiding growth and conservation in New Jersey's geographically diverse regions.[00 00] The first iteration of the State Plan, along with its State Plan Policy Map (or "Policy Map"), was adopted in 1992. The 2001 State Plan, also the second iteration of the Plan, has served as the version that has remained in effect as the statewide planning document for the last two decades.

2001 NEW JERSEY STATE DEVELOPMENT AND REDEVELOPMENT PLAN

The 2001 State Plan was developed with a forward-looking vision for New Jersey in the year 2020. This version of the State Plan acknowledges the impact that the location, type, and scale of development, redevelopment, and conservation efforts have on all aspects of life in New Jersey. Vibrant, livable communities and environmental stewardship can only emerge through careful planning and informed decision-making that involves citizens and agencies at all levels of government. The Statewide Policies outlined in the Plan must be applied to public and private decisions through the State Plan Policy Map, which provides a spatial understanding of the opportunities and constraints of the state's diverse geographies.

The 2001 State Plan Policy Map

To coordinate this balance between opportunities and constraints, the 2001 State Plan emphasizes that growth in more efficient and compact forms can help ensure high-quality public facilities and services, as

well as the conservation of natural landscapes. The State Plan Policy Map introduces the spatial concept of Planning Areas, Centers/Nodes, and Environs to achieve the Plan's goals and Statewide Policies, as deemed necessary. The 2001 Plan identifies Metropolitan and Suburban Planning Areas (PA1 & PA2) as locations where growth was to be *promoted*. Other categories where growth could be *accommodated* (limited to "well-designed centers") include Fringe (PA3), Rural (PA4), and some Environmentally Sensitive areas (PA5).

As defined in the 2001 State Plan, each of the designated **Planning Areas** are composed of land masses with tracts that share certain unique natural and built environment characteristics, making them suitable for a common application of policy, planning, and development.[00] There are five primary Planning Areas – PA1: Metropolitan; PA2: Suburban; PA3: Fringe; PA4: Rural; PA4B: Rural/Environmentally Sensitive; PA5: Environmentally Sensitive; PA5B: Environmentally Sensitive Barrier Island – that are used to categorize New Jersey's geography.[00] Given the large size of these boundaries, the Policy Map identifies **Center** boundaries for a clearer distinction between where growth should be *promoted* or *accommodated* within the Planning Areas. Areas beyond the Centers are defined as **Environs**, and should be leveraged to further contain growth and the protection of natural and environmentally sensitive landscapes. The interaction between these delineated Areas ultimately serves as the framework for structuring smart growth, limited growth, agriculture, open space, conservation, and other relevant categories established by the State Planning Act.

The State Plan outlines policy objectives that guide the implementation of statewide policies within each Planning Area. This means that the scale of growth and conservation varies across regions, tailored to the distinct needs and capacities of each Planning Area, as well as their unique geographical features. As these Planning Areas may not necessarily align with municipal boundaries, it is crucial that cross-agency coordination and partnerships occur between all levels of government to ensure strategic development, redevelopment, and conservation. For instance, the State Plan may prioritize ecologically designed, compact forms of development and redevelopment in "smart growth areas." These areas include Metropolitan and Suburban Planning Areas, Designated Centers, Pinelands Regional Growth Areas, Villages and Towns.[00] This localized approach ensures that development is both sustainable and responsive to the specific environmental, social, and economic contexts of each area.

Establishing the Planning Area boundaries are guided by the delineation criteria set forth in the State Plan, and local context may require flexible application of the criteria to achieve the Planning Objectives of each Planning Area.[00]

RESIDENTIAL DEVELOPMENT TRENDS (1940 - 2020)

By analyzing the housing stock over time and according to the Planning Area Boundaries delineated in the 2001 State Plan, it is possible to see where the housing stock has been growing and the scale of that growth over the decades.

Since 1940, New Jersey has experienced an upward trend in the total number of units added to its housing stock Between 1940 and 2020 New Jersey's stock tripled from 1 2 million to more than 3 7 million housing

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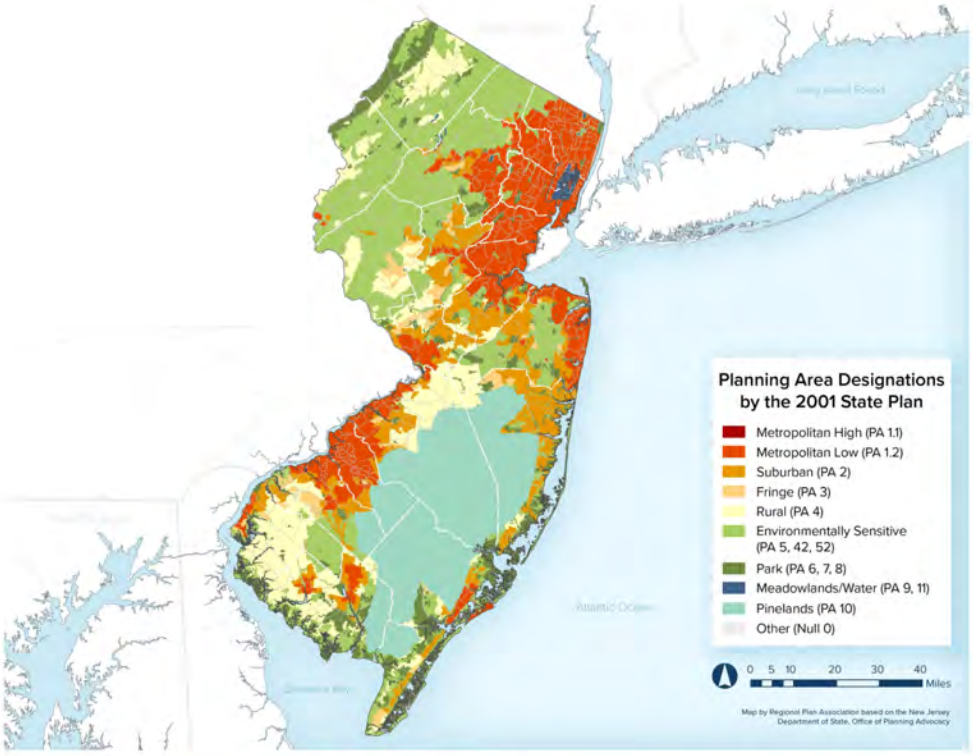
Political boundaries: Counties and Municipalities in New Jersey



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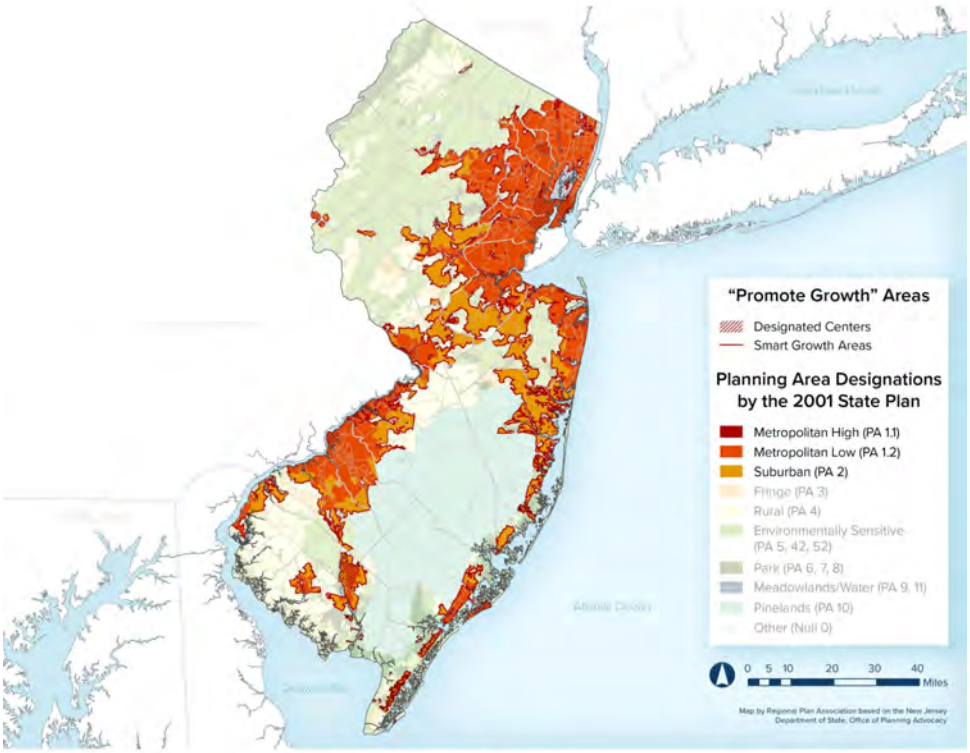
State Plan Policy Map



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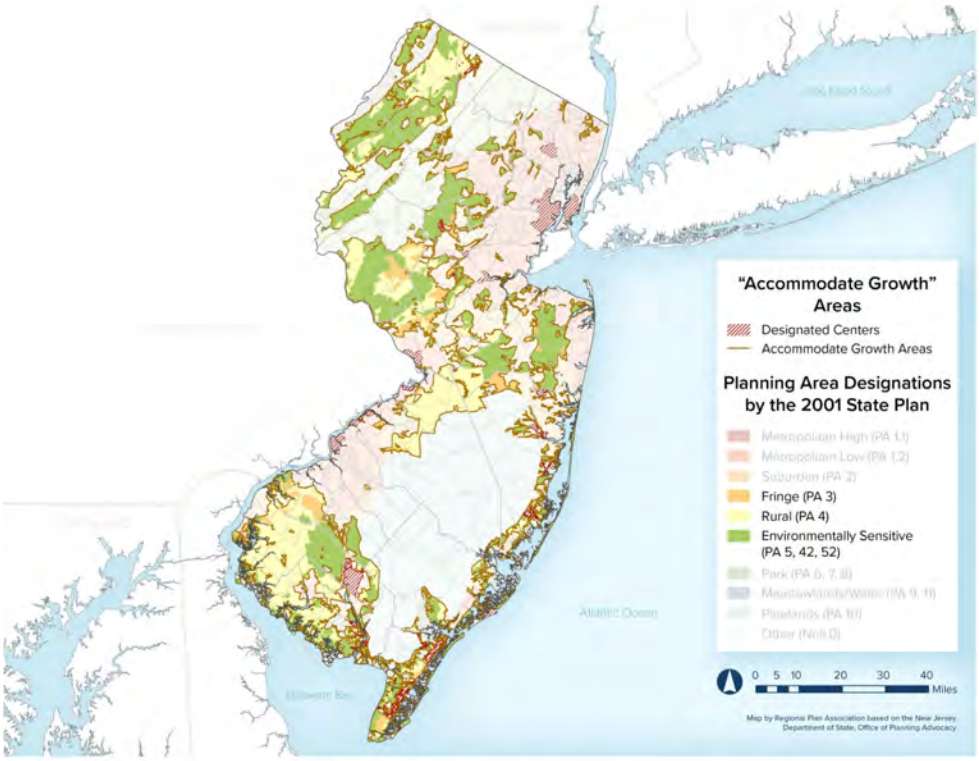
"Promote growth" areas



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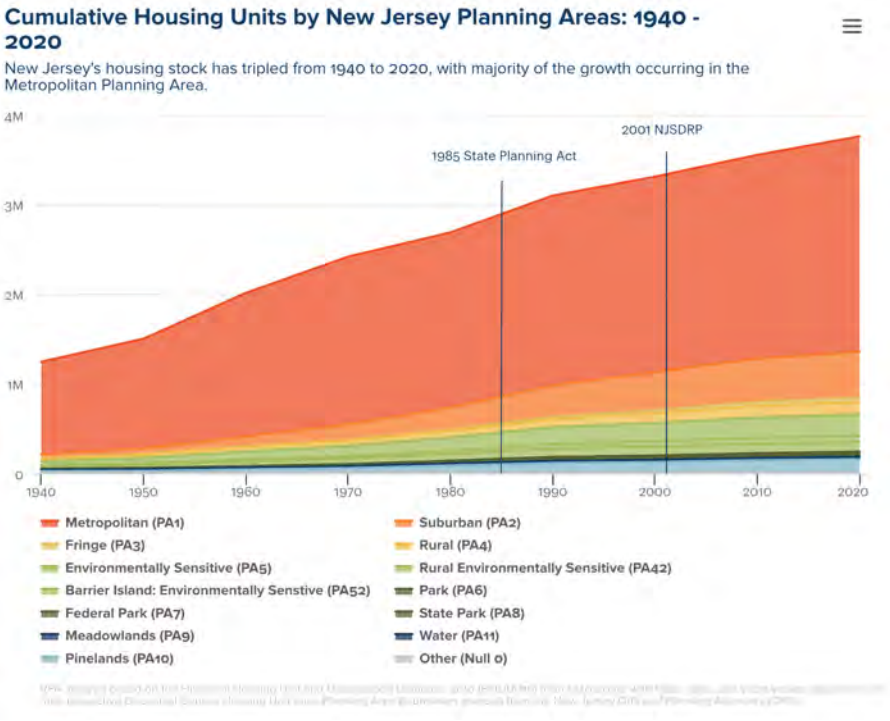
"Accommodate growth" areas

stock. Between 1940 and 2020, New Jersey s stock tripled from 1.2 million to more than 3.7 million housing units, a **2.5 million increase over 80 years**.[00] Of this increase, 1.4 million units (55% of the net increment) were built in areas designated as Metropolitan Planning Areas (PA1). As of 2020, housing units in Metropolitan areas add to over 2.4 million, representing 64% of the state's total stock. In contrast, Suburban Planning Areas (PA2) grew from 44,000 units in 1940, less than 4% of the total in that decade, to now comprising over half a million units, accounting for 13% of the state's total in 2020.

Housing stock located in both Metropolitan and Suburban areas represented over 2.9 million units in 2020, accounting for 77% of the state's total. The remaining 850k units, 23% of the total, are distributed among other Planning Areas, including Fringe (PA3), Rural (PA4), and Environmentally Sensitive areas (PA5). While some growth has continued in these locations, the net number of units has stabilized over the last two decades.[00]



Between 1940 and 2020, New Jersey's housing stock tripled, from 1.2 million to more than 3.7 million housing units.

Most growth occurred in the Metropolitan Planning Areas, where stock doubled from approximately 1 million in 1940 to 2.4 million units in 2020. The Suburban Planning Area (PA2) experienced the fastest growth, increasing from 44,000 units in 1940 to over 507,000 units in 2020, representing a tenfold rise. In contrast, the Fringe, Rural, and Environmentally Sensitive Planning Areas have experienced much slower growth, particularly since 2000.

Housing Production

Following the 2001 Plan, the state experienced a shift toward more compact housing development, characterized by a larger share of new stock in Metropolitan areas and an increase in multifamily building types. This has reduced the sprawling nature of development and limited the loss of open space and farmland. However, when compared to the 1980s and 1990s, the period from 2000 to 2020 saw a significant reduction in units produced across the state. This decline is likely attributed to a 15-year gap in the enforcement of Mount Laurel obligations from 2000 to 2015, which exacerbated issues related to housing affordability.

INCREMENTAL UNITS BY PLANNING AREA

During the 20-year period following the adoption of the 2001 New Jersey State Plan, there was a decline in the net change of housing stock (i.e., incremental units). When compared to the 1980s and 1990s, the 2000-2020 period saw 173,400 fewer incremental units across the state, representing a 28% reduction.[00]

In the decades following the 2001 Plan (2000-2020), Metropolitan Areas (PA1) experienced a growth of 232,000 units, representing 52% of the total statewide increase. This is almost the exact net change observed during the 1980s and 1990s; however, given that production was significantly lower across all other planning areas, statewide growth was reduced considerably. Lower housing production was most noticeable in Suburban Areas (PA2), where new stock was more than halved to 79,000 incremental units (2000 - 2020), compared to the 184,000 units added in the 1980s and 1990s.

In the 1980s and 1990s, approximately 226,300 units were added in Metropolitan Areas, accounting for 36% of the statewide increase during that time. During the same period, Suburban Areas (PA2) experienced a growth of 184,000 units, accounting for 29% of the total increase. Together, Metropolitan and Suburban Areas accounted for 410,000 units, or two-thirds of the growth experienced during the 1980s and 1990s.

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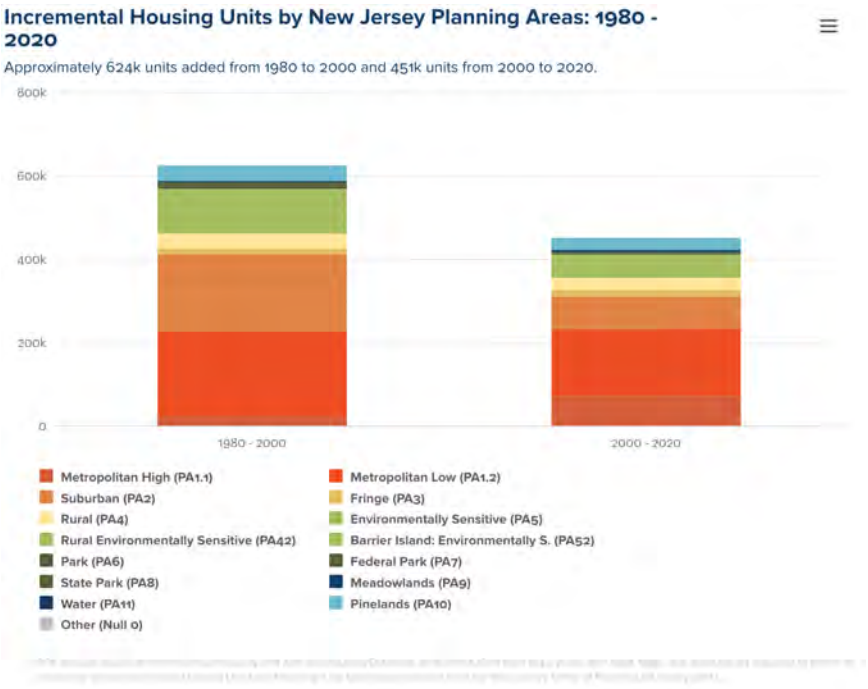


From 2000 to 2020, the state saw 173,400 fewer new housing units compared to the 1980s and 1990s.

In the decades following the 2001 Plan (2000-2020), Metropolitan Areas (PA1) added 232,000 units, representing 52% of the total state increase. While this roughly equates the growth observed in the 1980s and 1990s (in Metropolitan areas), overall statewide growth was significantly lower due to reduced development in other planning areas, most notably in Suburban (PA2) and Environmentally Sensitive (PA5) areas, which were roughly reduced by half.

To better discern development trends within Metropolitan Areas (PA1), RPA created subcategories based on residential density. We defined a threshold based on seven dwelling units per acre (as measured in the year 2000), which is the minimum generally considered necessary to support bus service.[00] With this, we created high and low-density subcategories of Metropolitan Areas (PA1.1 and PA1.2, respectively). The higher-density locations (PA1.1) are primarily concentrated in northern New Jersey, including but not limited to Jersey City, Hoboken, Union City, Fort Lee, Newark, Elizabeth, Paterson, and Orange, as well as Trenton and Camden in central New Jersey, and Atlantic City, Asbury Park, and Neptune City along the shore.

While more than half of total residential development between 2000 and 2020 occurred in the Metropolitan Planning Areas (PA1), most of that growth has been taking form in places in around the peripheries of the established urban centers mentioned above, in areas characterized to have less than seven dwelling units per acre, or moderate- to low-density (Metropolitan Areas PA1.2 areas).[00]

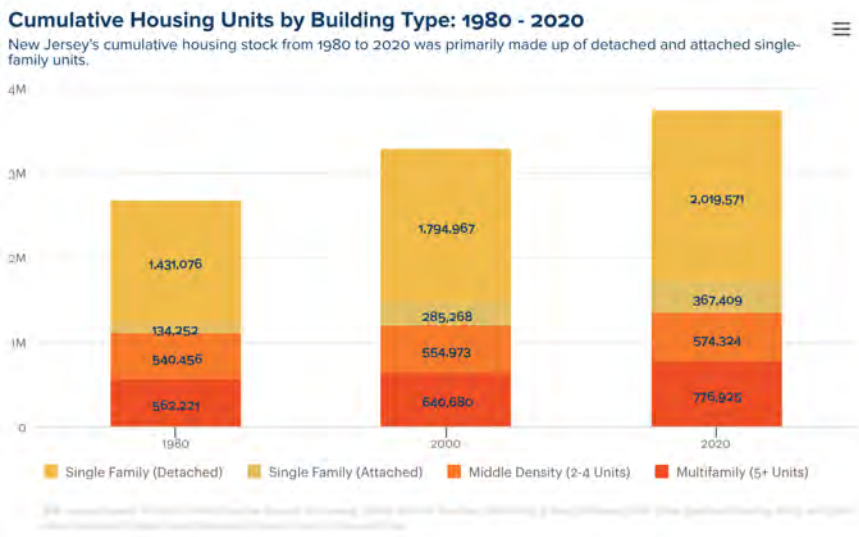
In the decades following the 2001 Plan (2000-2020), higher-density Metropolitan Areas (PA1.1) experienced a growth of 71,300 units, representing almost 16% of the statewide increase in that period, or three times more than in the previous decades (1980s and 1990s). However, despite the accelerated growth within higher-density Metropolitan Areas (PA1.1), these numbers were eclipsed by the 159,900 additional units created in lower-density Metropolitan Areas (PA1.2), which represented 35% of the net gains during the 2000-2020 period.

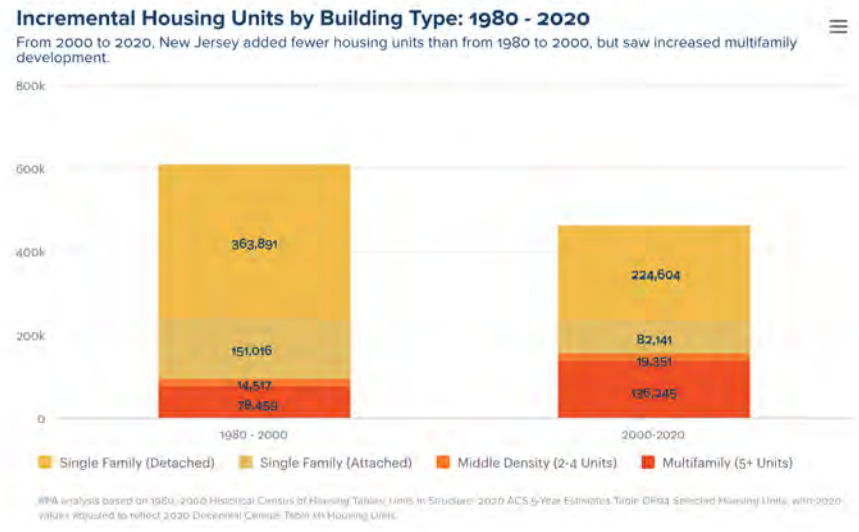
New Jersey Planning Area Designation	Housing Units by Decade			Increment 1980-2000			Increment 2000-2020		
	1980	2000	2020	Net Change 1980 - 2000	% Change by Planning Area	% of Total Increment	Net Change 2000 - 2020	% Change by Planning Area	% of Total Increment
Metropolitan High (PA1.1)	609,234	633,904	705,170	24,670	4%	4%	71,266	11.2%	15.8%
Metropolitan Low (PA1.2)	1,339,115	1,540,793	1,700,669	201,678	15%	32%	159,876	10.4%	35.4%
Suburban (PA2)	244,483	428,406	507,452	183,923	75%	29%	79,046	18.5%	17.5%
Fringe (PA3)	18,622	33,583	47,439	14,961	80%	2%	13,856	41.3%	3.1%
Rural (PA4)	76,186	112,368	142,672	36,182	47%	6%	30,304	27.0%	6.7%
Environmentally Sensitive (PA5)	149,906	209,080	244,454	59,174	39%	9%	35,374	16.9%	7.8%
Rural Environmentally Sensitive (PA42)	37,273	57,002	70,791	19,729	53%	3%	13,789	24.2%	3.1%
Barrier Island: Environmentally S. (PA52)	73,715	100,803	106,741	27,088	37%	4%	5,938	5.9%	1.3%
Park (PA6)	6,706	12,442	15,236	5,736	86%	1%	2,794	22.5%	0.6%
Federal Park (PA7)	12,590	18,521	21,156	5,931	47%	1%	2,635	14.2%	0.6%
State Park (PA8)	12,712	17,796	20,030	5,084	40%	1%	2,234	12.6%	0.5%
Meadowlands (PA9)	22,481	23,303	27,533	822	4%	0%	4,230	18.2%	0.9%
Water (PA111)	1,048	2,646	2,541	1,598	152%	0%	-105	-4.0%	0.0%
Pinelands (PA10)	79,351	117,054	146,714	37,703	48%	6.6%	29,660	25.3%	0.2%
Other (Null 0)	2,446	2,581	2,690	135	6%	0.0%	109	4.2%	0.0%
Total	**2,685,868**	**3,310,282**	**3,761,288**	**624,414**	**23.2%**	**100.0%**	**451,006**	**13.6%**	**100.0%**

*RPA analysis based on HHUUD 1940-2020 (adjusted to reflect 2020 census), New Jersey Office of Planning and Advocacy for planning designations, General Transit Feed Specification (GTFS) data for transit zone, and NOAA Storm Surge SLOSH Category 2. *Metropolitan Areas (PA1) were divided into two subcategories based on residential density in 2000 (seven units per acre).*

INCREMENTAL UNITS BY BUILDING TYPE

Between 1980 and 2020, the statewide housing stock expanded by 1.1 million units, representing a 40% increase. Despite this growth, the overall mix of housing by building type remains relatively unchanged, particularly among detached single-family and multi-family units. From this 40-year period, detached single-family homes have consistently comprised around 53% of the total housing stock, while multi-family units have maintained a share of roughly 20%. A more noticeable shift has occurred in the production of attached single-family and mid-density units, which have experienced a 5% increase and a 10% decrease, respectively, during the same time frame.





Single Family Detached Homes Dominate

New Jersey's cumulative housing stock from 1980 to 2020 has been dominated by single-family detached homes, which have accounted for just over half of the housing stock in 1980, 2000, and 2020. This trend is reflective of the decades of suburbanization that New Jersey has experienced well beyond what is captured in this 40-year period.

An Increase in Multifamily Homes

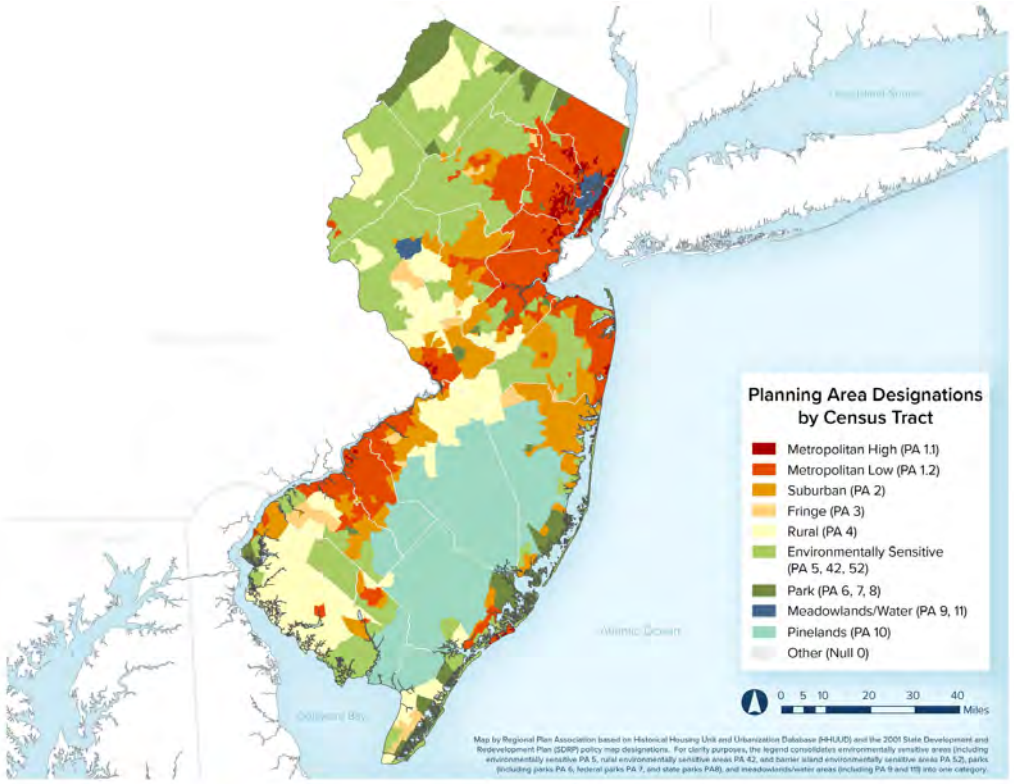
While new single-family homes continue to dominate the housing market, representing ⅔ of new stock built between 2000 and 2020, Multifamily housing (five or more units) saw a significant increase from 78,500 units in the 1980s and 1990s (13% of the total new stock during that period) to 136,200 units in the 2000s and 2020 (29% of new stock).

While new single-family homes continue to dominate the housing market, representing ⅔ of new stock built between 2000 and 2020, a noticeable shift has occurred in the types of housing units following the adoption of the 2001 State Plan. Multifamily housing (five or more units) saw a significant increase from 78,500 units in the 1980s and 1990s (13% of the total new stock during that period) to 136,200 units in the 2000s and 2020 (29% of the new stock). The significant increase in multifamily units is further evidenced by the steady rise from 2004 to 2022 in the percentage of residential Certificates of Occupancy (COs) issued for units allocated in multifamily structures or mixed-use projects.[00 00]

Between 1980 and 2000, detached single-family homes (363,900 units) and attached single-family homes (151,000 units) combined accounted for 83% of all housing units added. In contrast, from 2000 to 2020, the numbers of detached (224,604 units) and attached (82,141 units) single-family homes declined, resulting in them representing 66% of the new housing stock.

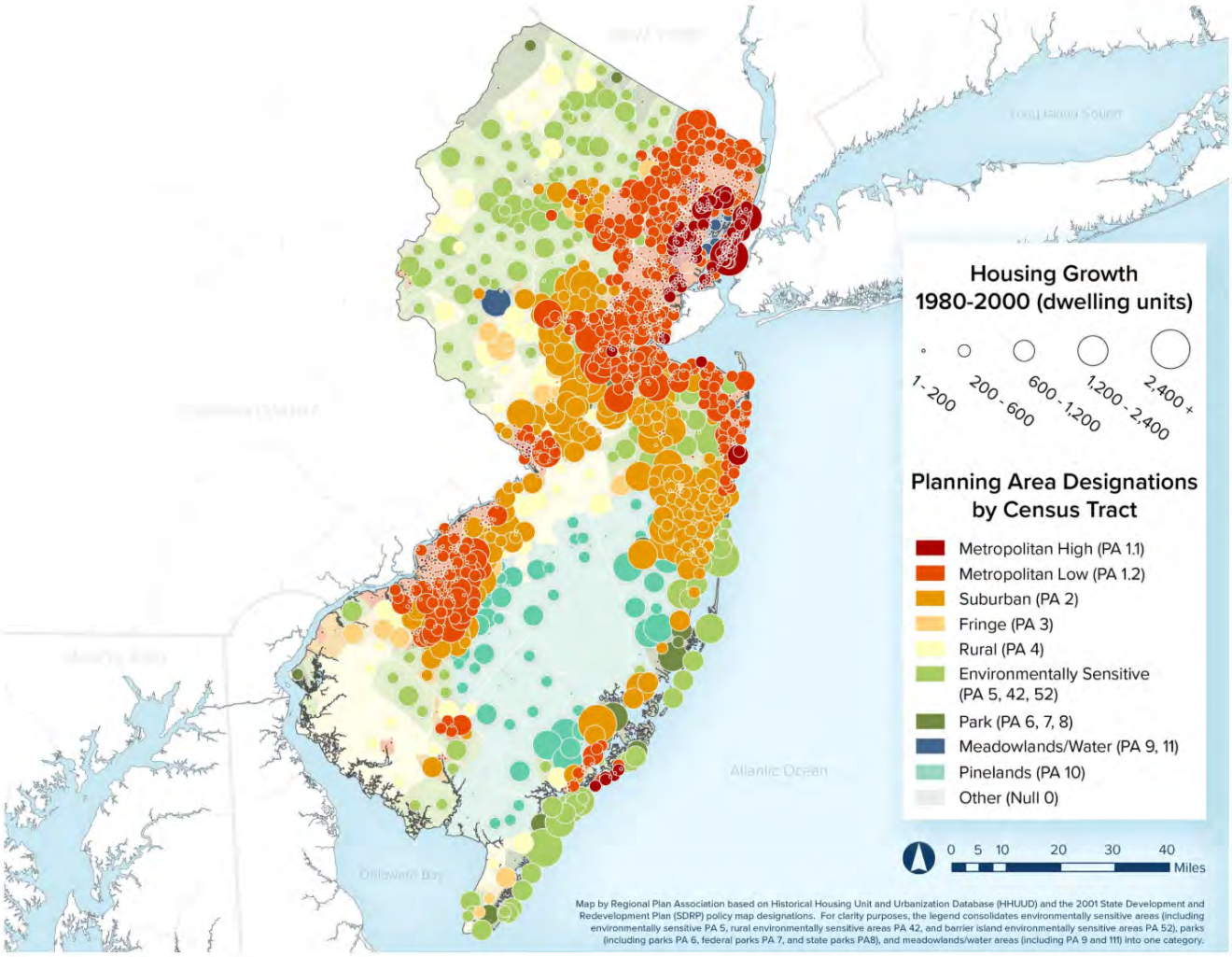
The production of middle-density housing increased from 14,500 units during the 1980s and 1990s to 19,350 units between 2000 and 2020. However, it is important to note that middle-density housing still accounts for less than 5% of the incremental housing stock for both time periods.

Despite this shift towards more compact housing development in the decades following the 2001 Plan, overall housing production from this period has declined by approximately a quarter compared to the period prior to the Plan's adoption. Underproduction of housing, particularly for typologies beyond single-family homes, likely contributes to New Jersey's worsening housing supply and affordability crisis.



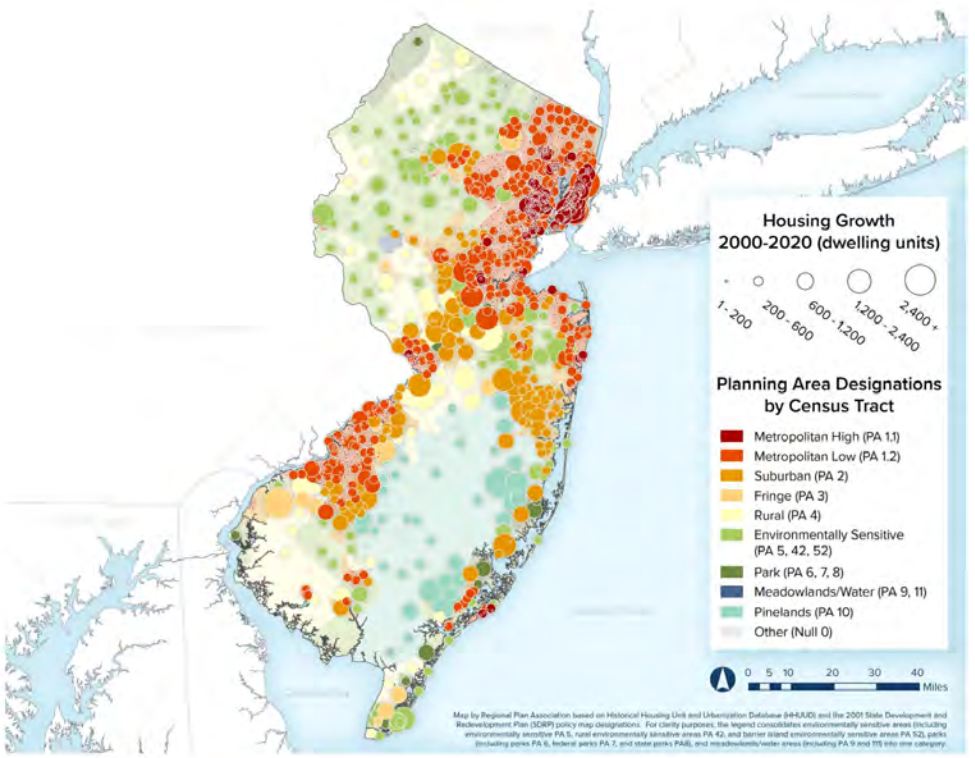
1/3

Policy Map as defined in the 2001 State Plan converted to Census Tract Geographies (HHUUD)



2/3

Incremental housing units between 1980 and 2000 by Planning Area



3/3

Incremental housing units between 2000 and 2020 by Planning Area

Housing Affordability

The 2001 State Plan and its Policy Map have made great strides in curbing sprawl and encouraging coordinated and "strategic" growth over its 20-year lifetime. However, for New Jersey to sustain long-term population and economic growth and enhance quality of life, this coordinated growth must be paired with housing production that keeps pace with demand.

Housing underproduction has likely exacerbated affordability pressures, putting a strain on the housing market's ability to meet the needs of the state's diverse population. New Jersey has experienced an overall 28% decrease in housing production in the decades following the adoption of the 2001 New Jersey State Plan (2000-2020). At the same time, the state's rental and owner vacancy rates remain exceptionally low, while both market-rate rents and home values sharply increase, burdening existing renters and excluding prospective buyers Three-quarters of low-income renters in the state are considered severely cost-burdened prospective buyers. Three-quarters of low-income renters in the state are considered severely cost-burdened by housing costs. 00

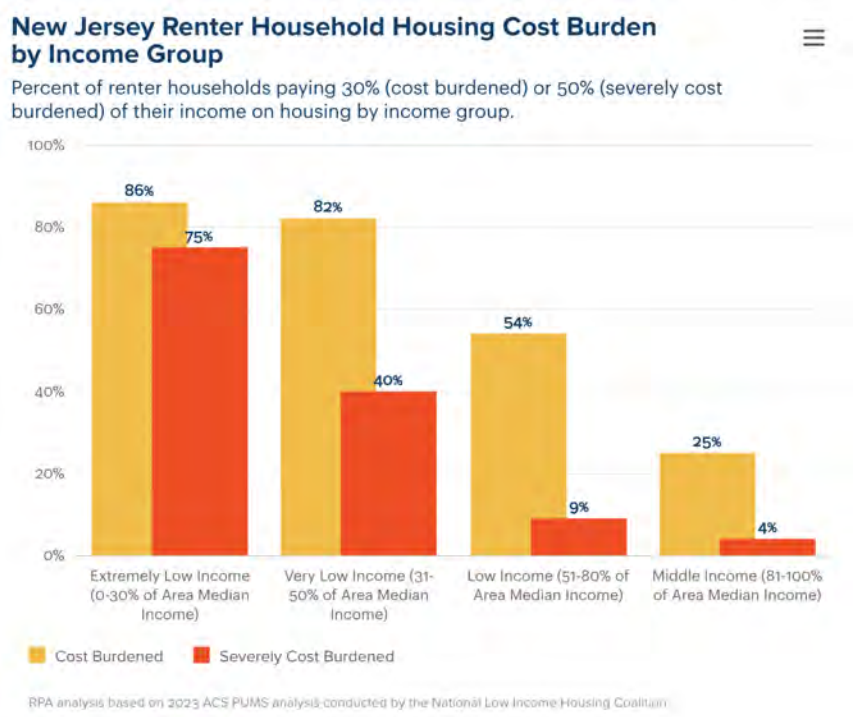
HOUSING COST BURDEN

As of 2023, the state's rental and owner vacancy rates remain exceptionally low, sitting at just 3% and 0.5%, respectively.[00] While the strain from a tight housing market is experienced everywhere, low-income renter households are disproportionately burdened by housing and its associated costs.[00] A 4-person household earning an income of $34,190 (extremely low-income band) falls $45,000 short of the needed to afford a two-bedroom rental home at HUD's Fair Market Rent ($79,215), underscoring the widening gap between household income and housing costs.[00] According to the National Income Housing Coalition, New Jersey faces a deficit of over 200,000 affordable and available units for extremely low-income renters.[00]

Related Report

Dec 2024

Housing Jersey City: Assessing Current and Future Gaps



As of 2023, 295,565 renter households in New Jersey are extremely low income, which represents 23% of all renters.[00]

Among them, 86% are cost-burdened, spending more than 30% of their income on rent, and 75% are severely cost-burdened, spending over half of their income on housing and other associated expenses. Additionally, 82% of very low-income renter households and 54% of low-income renter households face rent burdens, which underscores the severity of the cost burdens that lower-income New Jersey renter households face.

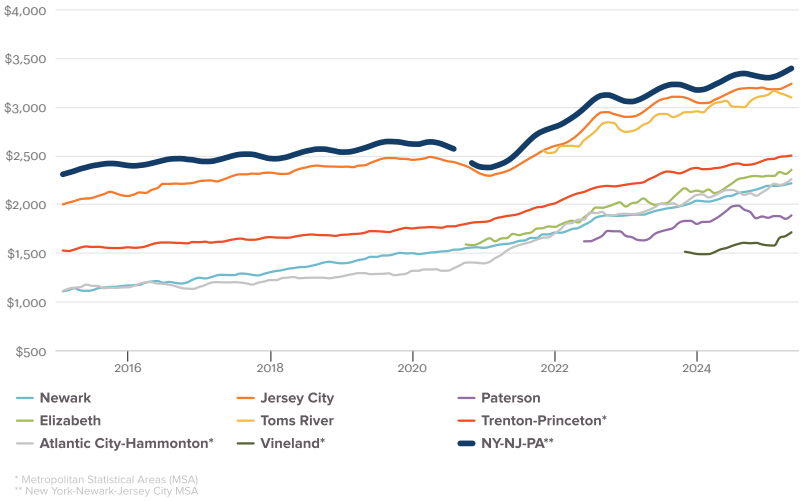
TRENDS IN MARKET RENTS AND HOME VALUES (2010 - 2025)

Since 2010, New Jersey has experienced a steady rise in both market-rate rents and home values, a trend reflected across the state's metro areas and major cities.[00] The broader New York Metropolitan Area ranks first in Zillow's Typical Observed Market Rent, with Jersey City ranking a close second, and Toms River trailing closely behind. Similarly, the Zillow Home Value Index, which is a measure of typical home values

and market changes across a given region and housing type, reveals that home values across New Jersey have experienced a steady upward trajectory and recovery following the decline in 2010 and 2013.[00] While average rent and home value thresholds have varied by region, all NJ metro areas and major cities have experienced sustained price increases over the past decade.

Typical Observed Market Rate Rent: 2015 - 2025 Q2

RPA analysis based on Zillow Observed Rent Index (ZORI) of NJ Cities and Metropolitan Statistical Areas. Mean of listed rents that fall into the 35th to 65th percentile range.



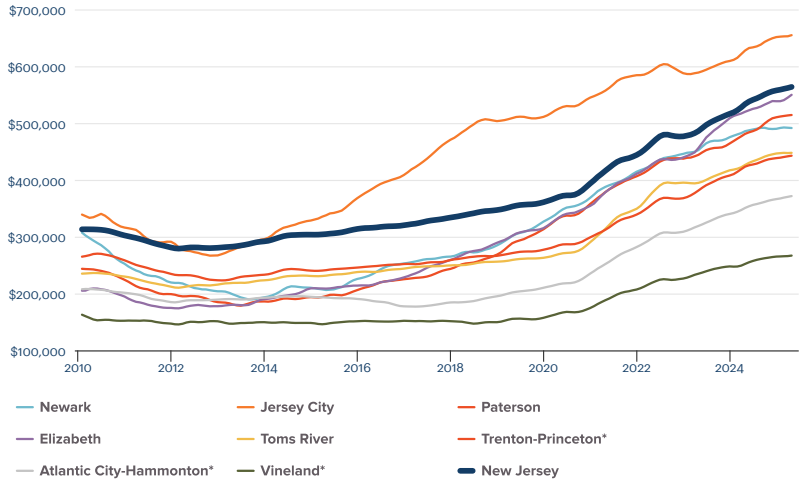
* Metropolitan Statistical Areas (MSA)
** New York-Newark-Jersey City MSA

Of the five major cities, Jersey City has ranked the highest in typical market rate rent over the past decade.

Jersey City's average rent price is above $3,200 as of 2025.[00] Trenton-Princeton averaged almost $375 more on rent month-to-month than Atlantic City, but $790 less than the broader New York Metropolitan Area. The New York Metropolitan Area reflects a trend similar to that of Jersey City, with an average rent that has jumped by 43.4% since 2015. As of 2025, Jersey City's typical observed market rate rent ($3,236) is nearly 60% more than the national average ($2,024).

Zillow Home Value Index: 2010 - 2025 Q2

RPA analysis based on Zillow Home Value Index (ZHVI) for NJ cities and metropolitan statistical areas. Mean of listed homes that fall into the 35th to 65th percentile range.

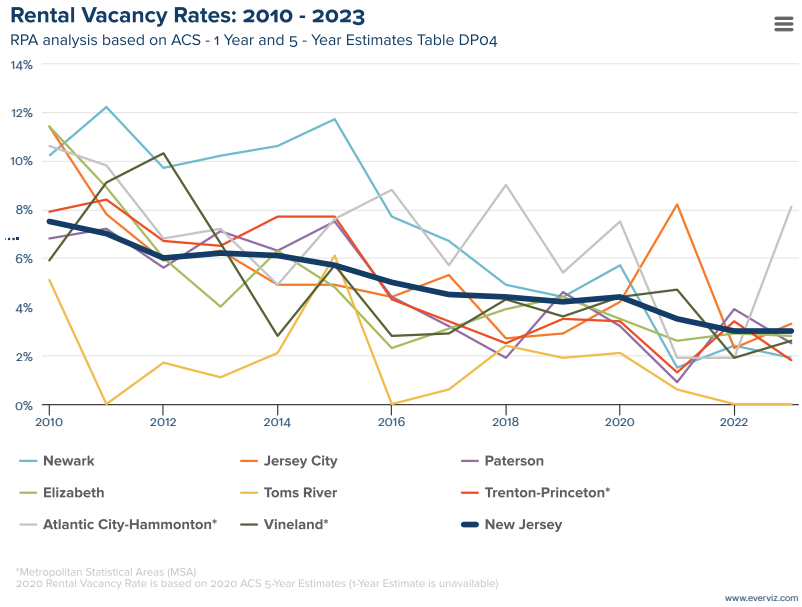


* Metropolitan Statistical Areas (MSA)

Since 2010, New Jersey's typical home value increased from $313,000 to $564,000, representing a rise of $250,650

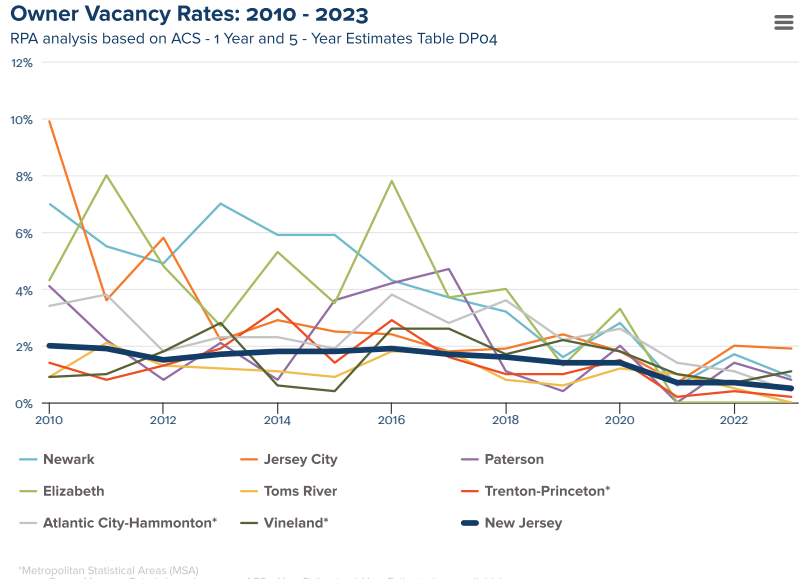
This increase outpaced home value trends seen in the state's metro areas and major cities.[00] New Jersey ranks second in mean home values that fall into the 35th to 65th percentile, falling behind Jersey City, which experienced a sharper increase in appreciation since 2013, nearly doubling in home values and reaching over $675,000 by 2025.

The inverse relationship between vacancy rates and typical market rent and home values speaks to the intensifying housing burdens that New Jersey residents, particularly low-income residents, are facing. Since 2010, New Jersey has experienced a decline in rental and homeowner vacancy rates, with both rates currently at their lowest levels as of 2023. Limited access to affordable and available housing units on the market has driven up rental and housing costs, a trend that is evident at the statewide level, in New Jersey's major cities, and metropolitan areas.



New Jersey's rental vacancy rate has dropped from 7.5% in 2010 to 3% in 2023, reflecting a tightening rental market.

Similar to the citywide trends seen in the owner vacancy rate, the rental vacancy rates have also experienced fluctuation over the past decade, while the statewide trends present a more steady decline. Although a healthy rental vacancy rate typically falls between 7 and 8 percent, a threshold New Jersey has not met since 2011.00



New Jersey's statewide owner vacancy rate has steadily declined over the past decade.

Less fluctuation has occurred statewide than has been observed in the state's five largest cities and metro areas. Statewide, the rate fell from 2% in 2010 to just 0.5% in 2023. This overall trend is mirrored across New Jersey's major cities, where owner vacancy rates have declined significantly over the past decade. Jersey City, in particular, experienced the sharpest drop, falling from 9.9% in 2010 to 1.9% in 2023. While a healthy owner vacancy rate is typically seen to be above 3.5%, the statewide trendline exhibits that New Jersey has not been able to meet this threshold in the past decade.00

Housing and Transit

NJ TRANSIT runs one of the largest public transportation systems in the country, moving over 720,000 people daily. Annually, it provides nearly 139 million bus trips and over 60 million rail trips, totaling more than 2.6 billion passenger miles.[00] Despite almost half of New Jersey's housing stock being near transit, the extensive network is still underutilized from a land use perspective.[00] Less than 20% of housing units (approximately 745,700 statewide) are situated in areas with enough residential density (and ridership) to support transit service and transit-oriented communities.[00] While there are examples of successful Transit-Oriented Development (TOD), they are not representative of the network's overall scale. Better aligning housing and transportation planning efforts should remain a key goal going forward.[00]

TRANSIT-ORIENTED DEVELOPMENT

The 2001 State Plan aims to advance the principles of smart growth by promoting Transit-Oriented Development (TOD) and other forms of infill, and by encouraging growth in Metropolitan Areas, Suburban Areas, and designated centers. Additionally, as part of the Infrastructure Needs Assessment, the Plan advances TOD by identifying upgrades and extensions to transit systems across the state.

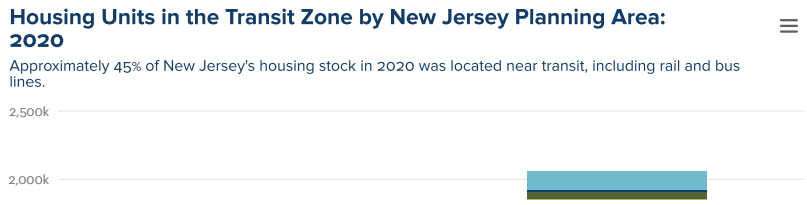
Transit-oriented development (TOD) offers numerous advantages, contributing to the creation of sustainable and vibrant urban communities. At its core, TOD strategically integrates residential, commercial, and recreational spaces around public transportation hubs, promoting access to employment opportunities and reducing reliance on private vehicles.[00] Overall, TOD presents a holistic and forward-thinking solution to urban and regional planning, addressing housing needs, mitigating environmental issues, and improving the quality of life for residents.

Despite the growing recognition of the benefits of TOD, many communities still face challenges in providing adequate housing on a large scale and in coordinating it effectively with public transportation. Additionally, there are fewer instances in the state where TOD has been implemented in an equitable manner. In New Jersey, significant racial and economic segregation exists near transit stations.[00]

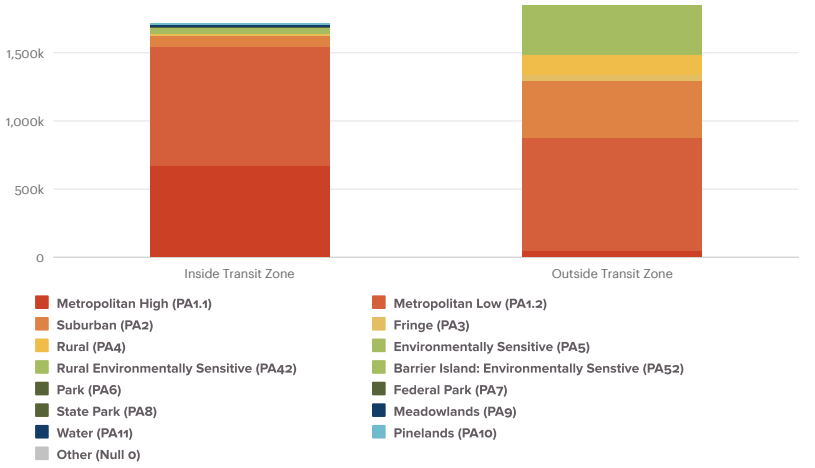
Related Report

Jun 2025

The Value of NJ TRANSIT



Approximately 1.7 million housing units throughout the state are located near transit, including both rail and bus lines.



RPA analysis of the Historical Housing Unit and Urbanization Database 2010 (HHUUD10), New Jersey Office of Planning and Advocacy and General Transit Fe Specification data (GTFS)

This represents 45% of the state's total stock. Over 1.5 million housing units located in proximity to transit are also situated within Metropolitan Areas (nearly 90% of the total within the transit zone). The remaining 172,000 units (approximately 10% of the total within the transit zone) are situated across Suburban, Fringe, and Rural Planning Areas.

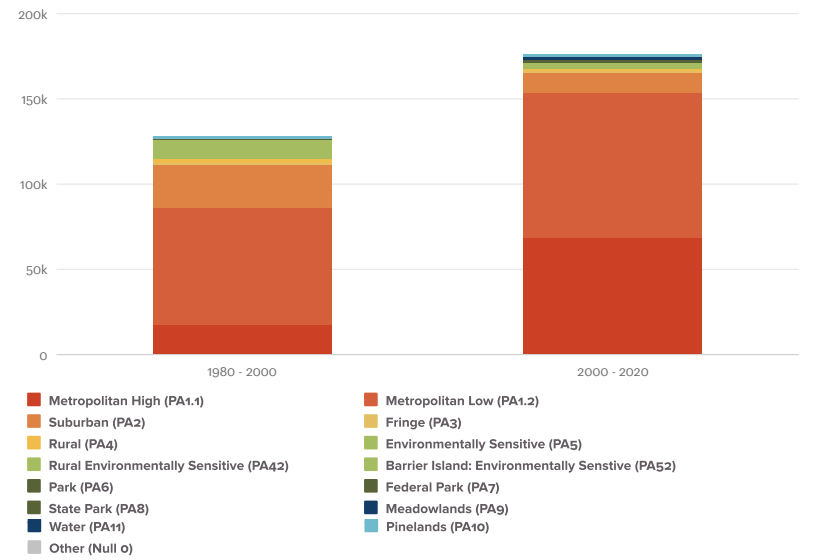
INCREMENTAL HOUSING IN TRANSIT ZONE BY PLANNING AREA

RPA measured the incremental number of housing units according to the Planning Area Boundaries delineated in the 2001 State Plan, and in relation to their proximity to transit. To do this, we defined a study area based on the distribution of rail stations and bus stops in the state. We drew a half-mile radius around each rail station, and a quarter-mile around bus stops to define *New Jersey's Transit Zone* (NJTZ).[00]

Between 2000 and 2020, the state added approximately 176,000 housing units in locations within *New Jersey's Transit Zone*. Such growth represents 39% of the statewide housing increase during that period. This represents a substantial increase compared to the growth observed before the adoption of the 2001 Plan. During the 1980s and 1990s, the state added approximately 128,000 units in areas near transit, which represents 21% of the total statewide increment during that period.

Incremental Housing Units in the Transit Zone by New Jersey Planning Area: 1980 - 2020

From 2000 to 2020, New Jersey added 48k more units in transit-rich areas compared to the period from 1980 to 2000.



RPA analysis of the Historical Housing Unit and Urbanization Database 2010 (HHUUD10), New Jersey Office of Planning and Advocacy and General Transit Fee Specification data (GTFS)

Between 2000 and 2020, the state added approximately 176,000 housing units within the transit zone

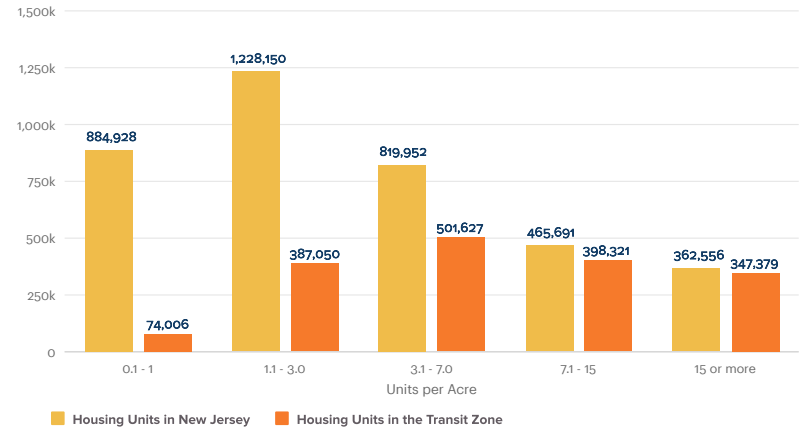
These units accounted for 39% of the total statewide increase during that time. This represents a significant rise compared to the 128,000 units added in transit areas during the 1980s and 1990s, which accounted for only 21% of the increase during that period.

RESIDENTIAL DENSITY AND TRANSIT ZONE

More compact and mixed-use forms of development largely depend on the availability and access to public transportation. Areas with higher residential density tend to have more people and households within a smaller space, making it easier to support frequent and reliable service. This higher density translates into more potential riders, which may offset the costs of providing service and reduce the need for government subsidies. At the same time, increased density enables and justifies larger investments in transit infrastructure and services.[00] This virtuous cycle helps reduce dependency on private vehicles, which are a significant source of pollution and environmental degradation.[00]

Housing Units and Density in Relation to the Transit Zone

RPA analysis based on General Transit Feed Specification data (GTFS), 2020 Decennial Census Housing Unit Total derived from the Historical Housing Unit and Urbanization Database 2010 (HHUUD10).

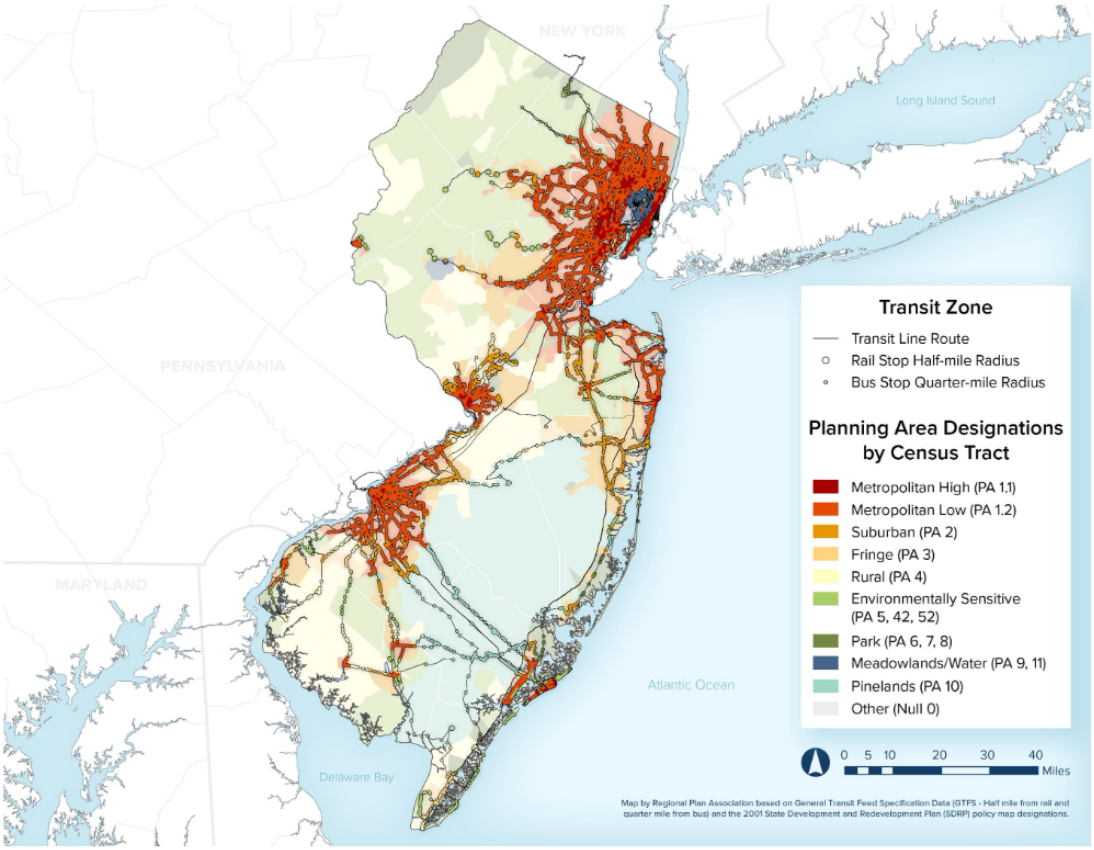


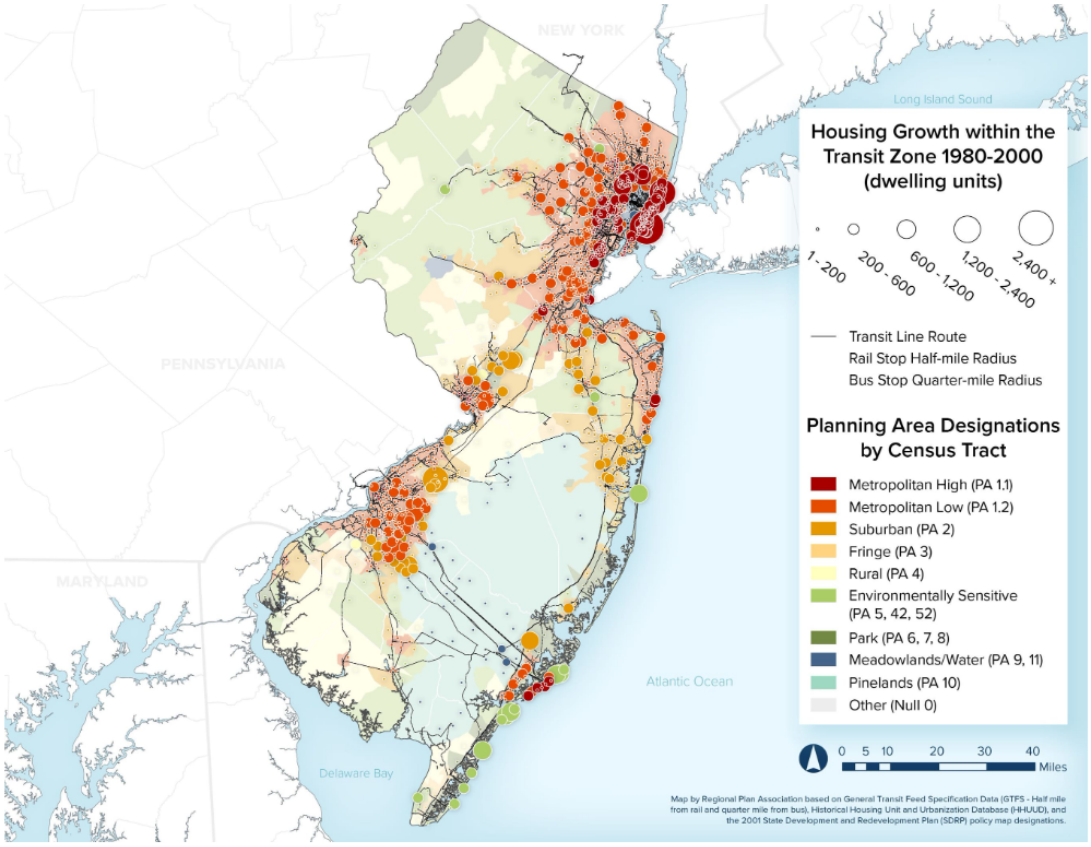
Most Areas Lack Density Needed to Support Service and Transit Oriented Communities

While almost half (45% or 1.7 million units) of the statewide housing stock is located in proximity to a transit stop, less than 20% (approximately 745,700 units) is in areas with enough residential density (and ridership) needed to support transit service and transit-oriented communities.

While almost half of New Jersey's statewide housing stock is located near a transit stop (1.7 million units, representing 45%), most of it is situated in areas that lack the necessary residential density and ridership to support transit service and transit-oriented communities. **Less than 828,000 units, representing 22% of the total statewide housing stock, are located in areas with sufficient density to sustain bus service**. Less than 362,000 (9.7% of statewide) are located in areas with sufficient density to support express bus service.[00] Even within the transit zone boundaries (NJTZ), approximately **963,000 units are located in areas with densities below the minimum required to support bus service.** This represents 56% of the total stock within the transit zone.[00]

In the absence of these densities (and the ridership that supports transit), operators either become more reliant on subsidies or vulnerable to declining service. Directing future growth into the NJTZ through better coordination and alignment between housing and transportation planning efforts should remain a key goal going forward.


NEW YORK
Long Island Sound
PENNSYLVANIA
MARYLAND
Atlantic Ocean
Delaware Bay
Transit Zone
Transit Line Route
Rail Stop Half-mile Radius
Bus Stop Quarter-mile Radius
Planning Area Designations by Census Tract
Metropolitan High (PA 1.1)
Metropolitan Low (PA 1.2)
Suburban (PA 2)
Fringe (PA 3)
Rural (PA 4)
Environmentally Sensitive (PA 5, 42, 52)
Park (PA 6, 7, 8)
Meadowlands/Water (PA 9, 11)
Pinelands (PA 10)
Other (Null 0)
0 5 10 20 30 40
Miles
Map by Regional Plan Association based on General Transit Feed Specification Data (GTFS - Half mile from rail and quarter mile from bus) and the 2001 State Development and Redevelopment Plan (SDRP) policy map designations.


NEW YORK
Long Island Sound
PENNSYLVANIA
MARYLAND
Atlantic Ocean
Delaware Bay
Housing Growth within the Transit Zone 1980-2000 (dwelling units)
1 - 200
200 - 600
600 - 1,200
1,200 - 2,400
2,400 +
Transit Line Route
Rail Stop Half-mile Radius
Bus Stop Quarter-mile Radius
Planning Area Designations by Census Tract
Metropolitan High (PA 1.1)
Metropolitan Low (PA 1.2)
Suburban (PA 2)
Fringe (PA 3)
Rural (PA 4)
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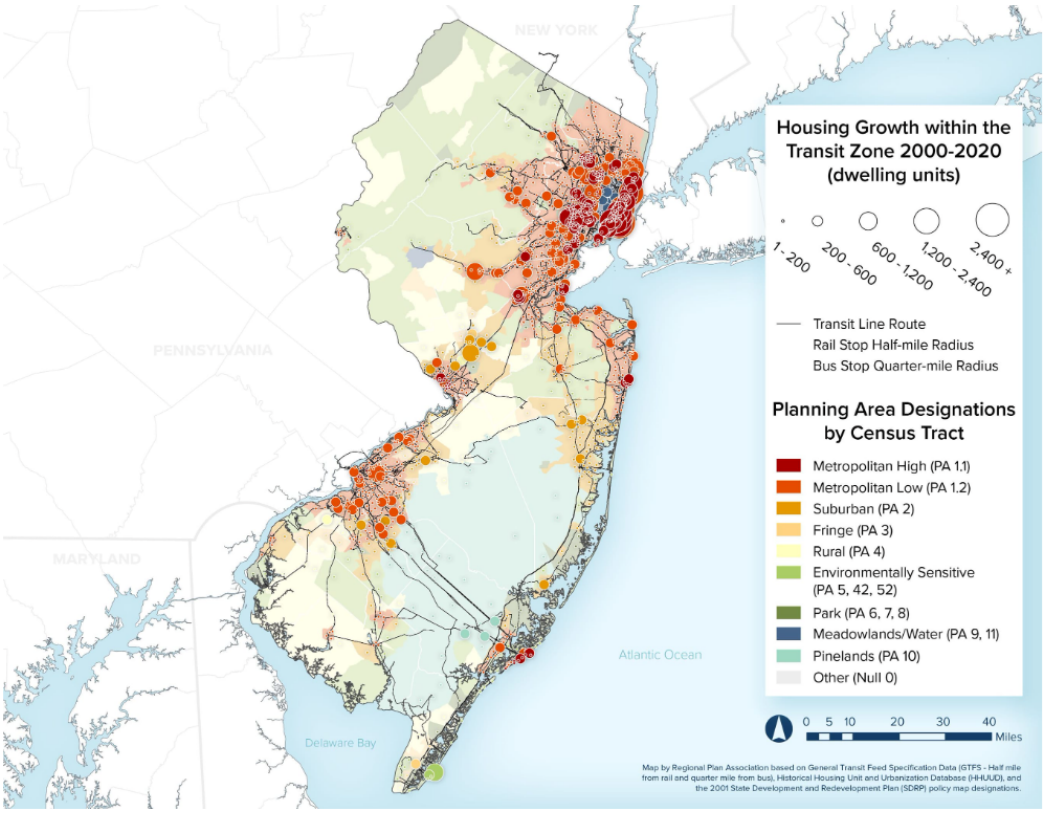
Park (PA 6, 7, 8)
Meadowlands/Water (PA 9, 11)
Pinelands (PA 10)
Other (Null 0)
0 5 10 20 30 40
Miles
Map by Regional Plan Association based on General Transit Feed Specification Data (GTFS - Half mile from rail and quarter mile from bus), Historical Housing Unit and Urbanization Database (HHUUD), and the 2001 State Development and Redevelopment Plan (SDRP) policy map designations.


NEW YORK
PENNSYLVANIA
MARYLAND
Atlantic Ocean
Delaware Bay
Housing Growth within the Transit Zone 2000-2020 (dwelling units)
1 - 200
200 - 600
600 - 1,200
1,200 - 2,400
2,400 +
Transit Line Route
Rail Stop Half-mile Radius
Bus Stop Quarter-mile Radius
Planning Area Designations by Census Tract
Metropolitan High (PA 1.1)
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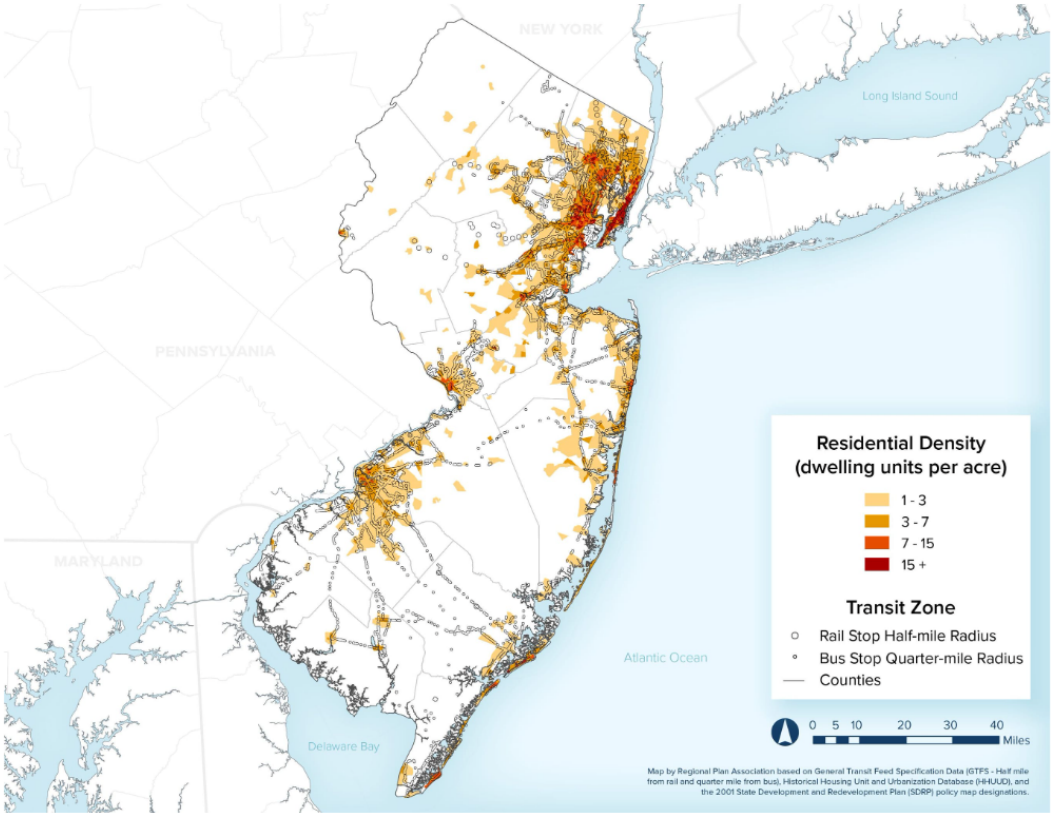
Fringe (PA 3)
Rural (PA 4)
Environmentally Sensitive (PA 5, 42, 52)
Park (PA 6, 7, 8)
Meadowlands/Water (PA 9, 11)
Pinelands (PA 10)
Other (Null 0)
0 5 10 20 30 40
Miles
Map by Regional Plan Association based on General Transit Feed Specification Data (GTFS - Half mile from rail and quarter mile from bus), Historical Housing Unit and Urbanization Database (HHUUD), and the 2001 State Development and Redevelopment Plan (SDRP) policy map designations.


NEW YORK
Long Island Sound
PENNSYLVANIA
MARYLAND
Atlantic Ocean
Delaware Bay
Residential Density (dwelling units per acre)
1 - 3
3 - 7
7 - 15
15 +
Transit Zone
Rail Stop Half-mile Radius
Bus Stop Quarter-mile Radius
Counties
0 5 10 20 30 40
Miles
Map by Regional Plan Association based on General Transit Feed Specification Data (GTFS - Half mile from rail and quarter mile from bus), Historical Housing Unit and Urbanization Database (HHUUD), and the 2001 State Development and Redevelopment Plan (SDRP) policy map designations.

Housing and Coastal Flooding

In 2012, a decade after the adoption of the 2001 Plan, Hurricane Sandy followed an unusual path through the North Atlantic, impacting New Jersey and the broader Tri-State region. The storm tide in Sandy Hook reached over 8.9 feet, and almost completely submerged barrier islands in Ocean County as the storm surge met rising waters from back bays like Barnegat Bay.[00] According to the Governor's office, approximately 346,000 housing units were damaged or destroyed across the state, with 22,000 units rendered uninhabitable.[00]

As of 2020, approximately 9.2% of the state's total stock is exposed to coastal storm surge flooding that could result from a Category 2 Hurricane.[00] Over the next 25 years, 565,000 parcels, representing 16.4% of properties statewide, will be exposed to major flood risk, threatening $435.9 billion in market value.[00] Understanding localized characteristics related to potential growth and flood risk will be crucial for minimizing exposure to flood risk and reducing the housing deficit in the next few decades.[00]

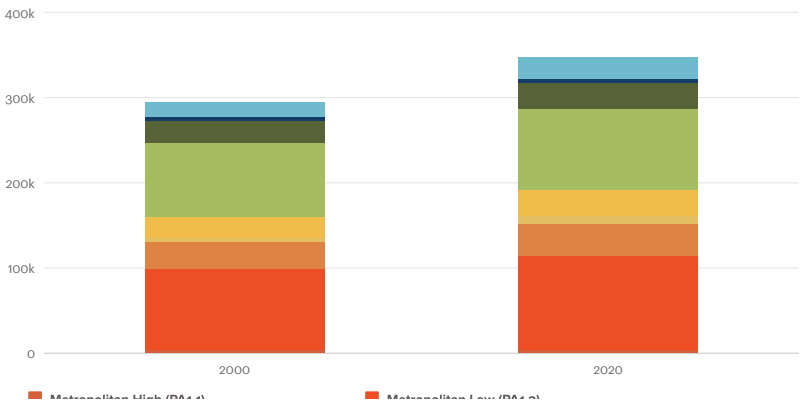
HOUSING EXPOSED TO COASTAL FLOODING

Storm surge is an abnormal rise in sea level caused by a storm's winds pushing water towards the shore. Wave action, generated by the storm's winds, rides on top of the storm surge, exacerbating coastal flooding and damage.

As of 2020, approximately 346,100 units, representing 9.2% of the state's total stock, are exposed to coastal storm surge flooding that could result from a Category 2 Hurricane.[00] Approximately 112,000 of such units (33% of the total stock exposed) are located in Metropolitan areas (PA1). Another 94,800 units (27% of total stock exposed) are situated in Environmentally Sensitive areas, including 58,200 units (17% of total stock exposed) within Barrier Island areas (PA52).

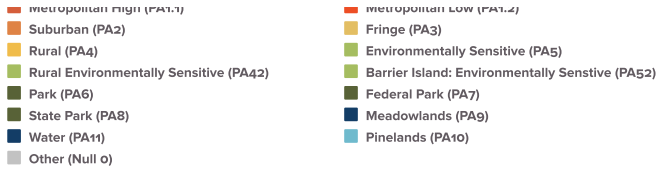
Housing Units Exposed to Coastal Flooding by New Jersey Planning Area: 2000 - 2020

RPA analysis of the Historical Housing Unit and Urbanization Database 2010 (HHUUD10), New Jersey Office of Planning and Advocacy, and NOAA Storm Surge SLOSH Hurricane Category 2.



As of 2020, approximately 346,000 units, representing 9.2% of the total stock, would be exposed to coastal storm surge flooding under a Category 2 Hurricane.

Approximately 112,000 of such units (33% of the total stock exposed) are located in Metropolitan areas (PA1). The 2020 estimates also show a net increase of approximately 52,000 more units (a 17% increase) exposed to coastal flooding when compared to units in 2000.



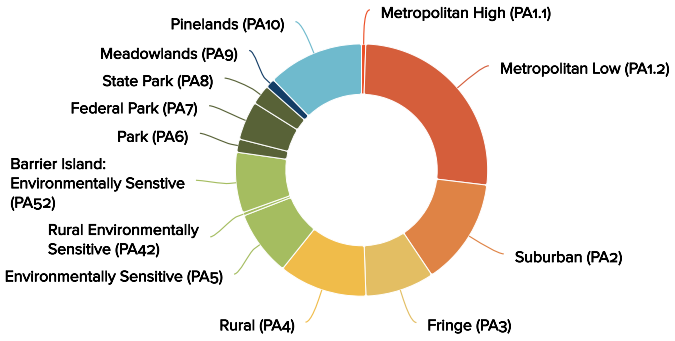
Incremental Units in Areas Exposed to Coastal Flooding

RPA compared the stock between 2000 and 2020 to measure the increase in residential units constructed in coastal flood-prone areas. Between 2000 and 2020, approximately 52,000 new units were built in areas exposed to coastal flooding.[00] Most of the new stock exposed to coastal flooding is situated in Metropolitan Areas (PA1), with almost 14,000 new units or 27% of the new stock at risk. An additional 7,100 units in Suburban areas (PA2) were built in locations exposed to flooding (14% of the new stock exposed). Fringe and Rural areas (PA 3 & 4) added 10,400 new units, corresponding to 20% of the new stock exposed. Approximately 8,500 new units in Environmentally Sensitive locations (PA 5, 42, and 52) were built in areas at risk (17% of new stock exposed), including 4,000 in Sensitive Barrier Islands.

Unfortunately, flooding hazards, increased by climate change, will continue to exacerbate the housing shortage. The growing risk of climate-driven flooding poses a significant threat to both existing and future housing developments in flood zones. Understanding localized characteristics related to potential growth and flood risk while maintaining a regional perspective will be crucial for both minimizing exposure to flood risk and reducing the housing deficit going forward.

Incremental Units Exposed to Coastal Flooding by New Jersey Planning Areas: 2000 - 2020

Compared to 2000, an additional 52k units were found to be exposed to coastal flooding in 2020.



RPA analysis of the Historical Housing Unit and Urbanization Database 2010 (HHUUD10), New Jersey Office of Planning and Advocacy and NOAA Storm Surge SLOSH Hurricane Category 2.

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More Units Exposed to Coastal Flooding

The 2020 estimates show a net increase of approximately 52,000 more units (or 17% increase) exposed to coastal flooding when compared to 2000. Most of the new stock exposed to coastal flooding is situated in Metropolitan Areas (PA1), with almost 14,000 new units or 27% of the new stock exposed.

Recommendations

1. Housing, transportation, and resiliency goals under the new updated State Plan must acknowledge needs that are both regional in scale and dynamic in time. Efforts to minimize flood risk, preserve open space and farmland, and address the housing shortage should consider local flood exposure conditions and attributes that favor "smart growth" through compact, walkable, and transit-oriented development, leveraging both urban mass transit and the state's extensive suburban rail network.

2. Municipalities and planning areas that are expected to experience lower flood exposure and have a greater potential for smart growth should promote transit-oriented development, mixed-use multifamily buildings, and infill development.[1] In these well-served transit areas, the plan should encourage municipalities to increase the minimum allowable density to seven units per acre and up to fifteen units where appropriate. Additionally, sustained investments will be necessary to improve the capacity and reliability of transportation services and infrastructure.

3. Areas at high risk of flooding and with potential for smart growth need effective planning that promotes development while protecting communities and infrastructure through flood-resilient design. These regions must balance climate risks with substantial housing growth. To address this, it's crucial to implement policies that integrate climate resilience with housing. Conducting risk assessments will guide strategic investments in resilient infrastructure, ensuring that funding aligns with the growth and adaptation needs of vulnerable communities.

4. Municipalities highly exposed to future flooding and with relatively low potential for smart growth may require different strategic approaches, such as managed retreat and reprogramming existing land use to open space and recreational uses, as well as including restrictions on certain types of residential development. Instead of focusing solely on disaster recovery, the new plan should encourage localities to design for long-term adaptation and resilience. Localities should utilize their land use authority to discourage residential development in areas with low growth potential and assist homeowners and renters in relocating away from flood hazards.

5. Areas with low future flood risk and limited smart growth potential can enhance livability and sustainability through targeted interventions that prevent urban sprawl. By focusing on adaptive reuse and middle-density buildings along existing transit and commercial corridors, these areas can promote mixed-use development and improve connectivity. The best approach is to adopt incremental development at moderate densities, accompanied by gradual improvements in transit.

6. To achieve the recommendations above, the new plan and related Policy Map should develop a more nuanced framework to integrate Planning Areas and corresponding policies. As currently defined, these are too broad to capture the distinctions between the issue areas examined in this report. Metropolitan Planning Areas (PA1) in particular require policies that better reflect distinctions between residential density, transit proximity, and flood risk.

Conclusion and Next Steps

Conclusion

The analysis of New Jersey's residential development trends between 2000 and 2020 reveals a period of significant shifts, shaped by the aspirational goals of the 2001 State Development and Redevelopment Plan. While the state made commendable progress in promoting a more compact, smart-growth development pattern, particularly in its metropolitan centers, and limited the loss of open space and farmland, this was accompanied by a substantial statewide underproduction of housing. This imbalance has directly fueled a severe affordability crisis, characterized by critically low vacancy rates and soaring housing costs for both renters and homeowners across the state. Furthermore, despite encouraging growth in transit-proximate housing, many of these areas still lack the density required to fully leverage public transportation infrastructure, indicating a missed opportunity for truly integrated and sustainable communities.

Crucially, this retrospective study highlights the escalating challenge of climate change as significant new residential construction continues in areas highly vulnerable to coastal flooding, even after lessons from events like Hurricane Sandy. The inherent tension between guiding development, addressing housing needs, and mitigating environmental risks became increasingly apparent during this period. The voluntary nature of the 2001 Plan, while fostering some positive shifts, ultimately could not override local land-use regulations or sufficiently incentivize comprehensive solutions to the complex, interconnected issues of housing supply, affordability, transit integration, and climate resilience.

As New Jersey moves forward with the preliminary 2024 State Plan and its ongoing cross-acceptance process, the findings from this 20-year analysis offer invaluable insights. Future planning efforts must transcend broad classifications and adopt a more nuanced approach, particularly for Metropolitan Planning Areas, to explicitly integrate considerations of residential density, transit proximity, and flood risk. By leveraging these lessons, the updated State Plan has a critical opportunity to develop truly effective strategies that ensure sufficient and affordable housing for all New Jerseyans, while simultaneously building resilient communities capable of adapting to the realities of a changing climate.

Next Steps

A second component to this analysis will assess similar trends but as it relates to the third round of affordable housing obligations (2015-2025), under the Fair Housing Act (Mount Laurel Doctrine).[00] As New Jersey confronts ongoing pressures related to housing affordability, climate change, and unequal access to opportunities, the forward-looking goals and policies outlined herein will play a central role in shaping the state's trajectory over the coming decades.

Methodology & Technical Documentation

- **Planning Area Designation by Census Tracts**
- **Cumulative and Incremental Housing Units by Planning Area (1940-2020)**
- **Cumulative and Incremental Housing Units by Building Type (1980-2020)**
- **Homeowner and Rental Vacancy Rates (2010 - 2023)**
- **Typical Observed Market Rate Rent (ZORI) - (2015 - 2025 Q2)**
- **Zillow Home Value Index (ZHVI) - (2000 - 2025 Q2)**
- **Aggregated Dataset & Dictionary Attributes**

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We express our sincere gratitude to Walter C. Lane and the staff at the New Jersey Office of Planning Advocacy for their insightful review. We'd also like to thank Scott N. Markley, Ph.D., for his guidance on using the Historical Housing Unit and Urbanization Database. We also appreciate RPA staff, both current and former, who contributed their insights and to the production of the report. They include Tom Wright, Kate Slevin, Moses Gates, Sam Bowden, Dave Zackin, Meaghan McElroy, Christina Kata, and Javier Fernandez.

FUNDED BY

F.M. Kirby Foundation