



DEVELOPMENT HIGHLIGHTS 2003

INTRODUCTION

This *Development Highlights 2003* report summarizes the residential and commercial development activity in Arlington County in 2003. This report is the fifty-seventh in a series of Planning Information reports, which are available from the Arlington County Planning Division.

This report is organized into three sections. The first section describes residential and commercial projects that were completed in 2003, projects that were under construction in 2003, and projects that were approved by the Arlington County Board through the site plan process in 2003. Data on demolitions are also presented. Historical data and summary tables and charts are included to supplement the text. The second section of this report includes several GIS-based maps showing locations of projects in each stage of development. The last section is a comprehensive list of each project approved, under construction, completed or demolished as of December 2003.

A NOTE ON OUR METHODOLOGY

The Planning Research and Analysis Team tracks development activity using data on building, certificate of occupancy and demolition permits, as well as information from County Board minutes and County staff reports. This report contains information on new construction only and does not include data on alterations, renovations or changes of use. In some cases, large projects may be split into different phases that are tracked separately.

SUMMARY

Compared with 2002, slightly fewer residential and commercial projects were completed in 2003, but construction starts were very strong. Approximately 330,000 square feet of office space and 110,000 square feet of retail space were completed in 2003. In addition, almost 1,400 new residential units were built last year. The vast majority of the development activity occurred in the Rosslyn-Ballston corridor. All of the new completed office gross floor area (GFA) was part of two office projects in the Clarendon and Virginia Square Metro Station Areas. Seven out of the eight completed multi-family and townhouse projects were in the Rosslyn-Ballston corridor. Major retail projects, totaling over 62,000 square feet, were completed in the Clarendon Metro Station Area.

In addition to newly completed projects, there is considerable on-going construction activity in Arlington. As of December 31, 2003, there were over 1.9 million square feet of office space under construction in eleven projects, with over half of the GFA in the Ballston Metro Station Area. There were over 2,000 residential units under construction; more than half of this residential construction is in the Clarendon Metro Station Area. Finally, there were about 285,000 square feet of retail GFA under construction, with more than 55 percent under construction in the Crystal City Metro Station Area.

In 2003, the Arlington County Board approved seventeen projects totaling almost 1.0 million square feet of office space; 135,000 square feet of retail space; and 2,000 residential units. Most of the approved site plan projects are located in the Rosslyn-Ballston Metro corridor and in the Crystal City Metro Station Area. In addition, several small residential projects were approved for development along Columbia Pike and near the East Falls Church Metro Station. Plans for a multi-family residential building in Shirlington also received final site plan approval.

The vast majority of completed and planned development in Arlington has been directed to the County's Metro corridors. This development approach guides new development to higher-density areas near transit, while preserving the character of lower-density residential neighborhoods. With the County Board's approval of the Columbia Pike revitalization plan in 2002, there has been increased interest in development opportunities along Columbia Pike, as well. Most projects approved, under construction or completed in the County in recent years include at least two uses (e.g., residential and retail), fulfilling the County's commitment to developing mixed-use projects and neighborhoods.

COMPLETED PROJECTS

Two office buildings were completed in 2003—The Hartford in Clarendon and Ballston Gateway in Virginia Square. Ballston Gateway was completed in the first quarter of 2003, while The Hartford was completed in the fourth quarter of 2003.

Several major residential projects were also finished in 2003. Multi-family projects include The Gallery at Rosslyn and The Residences at Memorial Overlook in Rosslyn, The Hartford Condominium and The Jefferson at Clarendon Centre in Clarendon, The Continental in Ballston, and The Metropolitan at Arlington on Army Navy Drive. Two townhouse projects—Bromptons at Rosslyn and Bromptons at Monument Place—were also completed in Rosslyn. In addition, 83 new single family houses were built in the County, primarily outside of the County's planning areas.

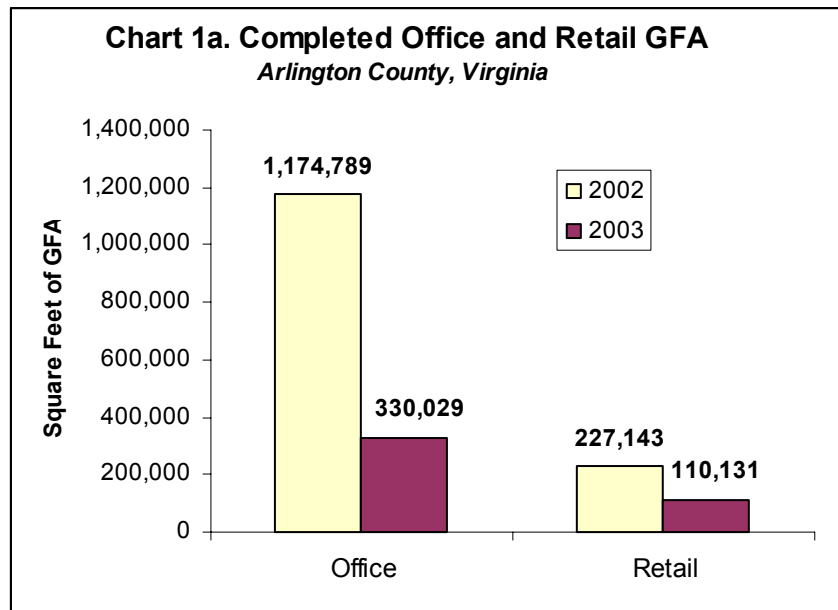
The Clarendon Market Common Phase II and The Market place added 62,373 square feet of retail space in Clarendon.

Overall, there were fewer projects completed in 2003 than in 2002. Significantly less office GFA was completed in 2003 compared with 2002—330,000 square feet versus 1.2 million square feet. Despite the completion of two major retail projects in Clarendon, there was also less retail GFA completed in 2003—110,000 square feet versus 227,000 square feet. Residential completions were also lower—1,390 units versus 1,934 units. Finally, in 2002 two new hotel projects were completed with a total of 350 hotel rooms. There were no new hotels completed in 2003.

Table 1. Major Projects Completed in 2003*

Project Name	Planning Area	Density
Office Projects		
The Hartford	Clarendon	207,125 s.f. office 15,617 s.f. retail
Ballston Gateway	Virginia Square	122,904 s.f. office 13,784 s.f. retail
Residential Projects		
Bromptons at Rosslyn	Rosslyn	19 townhouses
Bromptons at Monument Place	Rosslyn	15 townhouses
The Gallery at Rosslyn	Rosslyn	314 apartments
The Residences at Memorial Overlook	Rosslyn	35 condominiums
The Hartford Condominium	Clarendon	70 condominiums
The Jefferson at Clarendon Centre	Clarendon	252 apartments
The Continental	Ballston	412 condominiums
The Metropolitan at Arlington	Outside Planning Areas	190 apartments
Retail Projects		
Clarendon Market Common Phase II	Clarendon	22,753 s.f. retail
The Market Place	Clarendon	39,620 s.f. retail

*Please see detailed list at the end of the report for all 2003 completions.



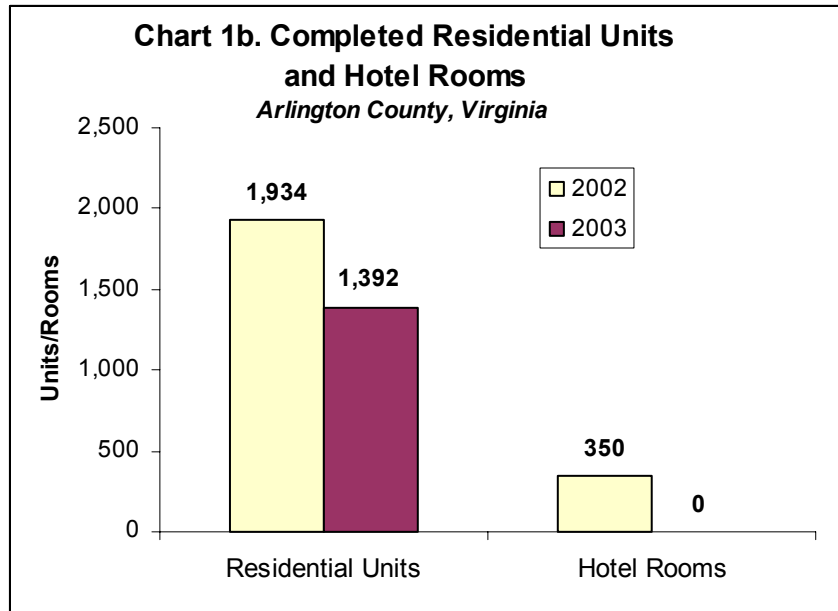


Table 2. Completed Projects by Planning Area (2003)

Planning Area	Office Sq. Ft.	Retail Sq. Ft.	Residential Units	Hotel Rooms
Rosslyn	0	4,268	383	0
Court House	0	0	0	0
Clarendon	207,125	92,079	322	0
Virginia Square	122,904	13,784	0	0
Ballston	0	0	412	0
Pentagon City	0	0	0	0
Crystal City	0	0	0	0
Columbia Pike	0	0	0	0
Shirlington	0	0	0	0
East Falls Church	0	0	0	0
Lee Highway	0	0	0	0
Outside Planning Areas	0	0	275	0
County Total	330,029	110,131	1,392	0

PROJECTS UNDER CONSTRUCTION

Office and retail construction starts in 2003 outpaces the level in 2002, while residential construction starts were down slightly. Three major office buildings began construction in 2003—Navy League in Court House, FDIC Phase 2 in Virginia Square and Liberty Center Phase 1 in Ballston. Crystal City Retail and the Residences at Station Square, two additional projects with office components, also began construction in 2003. Thus, 2003 office construction starts totaled 1.1 million square feet. Several other projects began construction before 2003 so that by December 31, 2003 there were over 1.9 million square feet of office GFA under construction in Arlington.

Table 3. 2003 Construction Starts*

Project Name	Planning Area	Density
Office Projects		
Navy League	Court House	196,181 s.f. office 16,766 s.f. retail
FDIC Phase 2 Office	Virginia Square	410,364 s.f. office 5,108 s.f. retail
Liberty Center Office Phase 1	Ballston	328,740 s.f. office 5,000 s.f. retail
Residential Projects		
1633 N. Colonial Terrace	Rosslyn	34 condominiums
Rhodes Street Condominiums	Rosslyn	8 condominiums
Bromptons at Court House	Court House	14 townhouses
Residences at Station Square	Clarendon	308 residential units 64,545 s.f. office 21,515 s.f. retail
The Berkeley at Ballston	Ballston	83 condominiums
Lofts at Crystal Towers	Crystal City	215 residential units
Seirra Condominiums	Columbia Pike	53 net new units (109 renovated units)
The Promenade at East Falls Church	East Falls Church	23 townhouses
Bromptons at Lyon Park	Outside Planning Areas	15 residential units
Tara Manor	Outside Planning Areas	12 single-family houses
Retail Projects		
Clarendon Market Common Phase II**	Clarendon	22,753 s.f. retail
The Market Place**	Clarendon	39,620 s.f. retail
Crystal City Retail	Crystal City	158,384 s.f. retail 84,034 s.f. office

*Please see detailed list at the end of the report for all projects under construction in 2003.

**These projects were also completed in 2003.

Three major residential projects also began construction in 2003—Residences at Station Square in Clarendon, Lofts at Crystal Towers in Crystal City and The Berkeley at Ballston. Several smaller projects and single-family houses, both inside and outside of the Metro Corridors, began construction in 2003, bringing the total residential construction starts in 2003 to 982 residential units. As of December 31, 2003, there were a total of 2,019 residential units under construction in Arlington County (148 single-family houses.)

Several major retail projects began construction in 2003—Clarendon Market Common Phase II, The Market Place and Crystal City Retail. Both Clarendon Market Common Phase II and The Market Place were also completed in 2003. Additional retail density began construction as part of various office and residential projects. As of December 31, 2003, there was a total of approximately 285,000 square feet of retail under construction in Arlington.

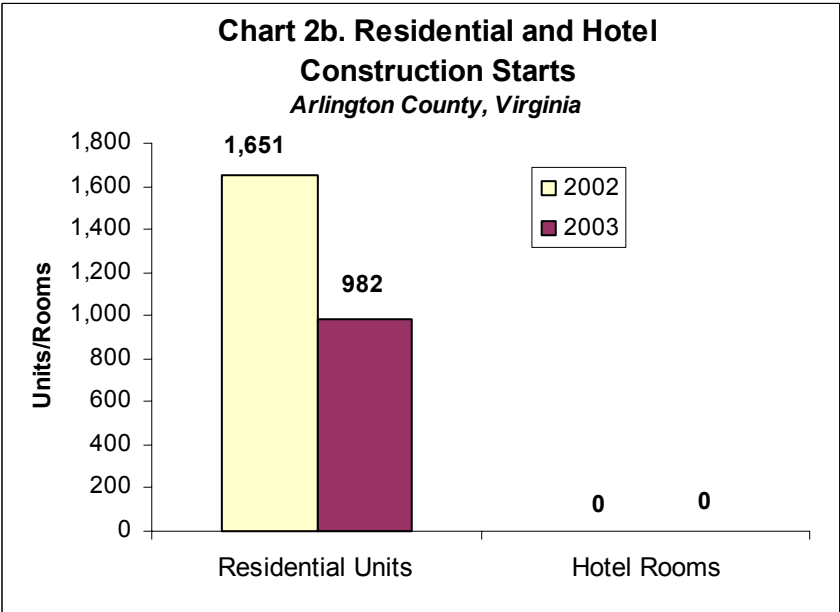
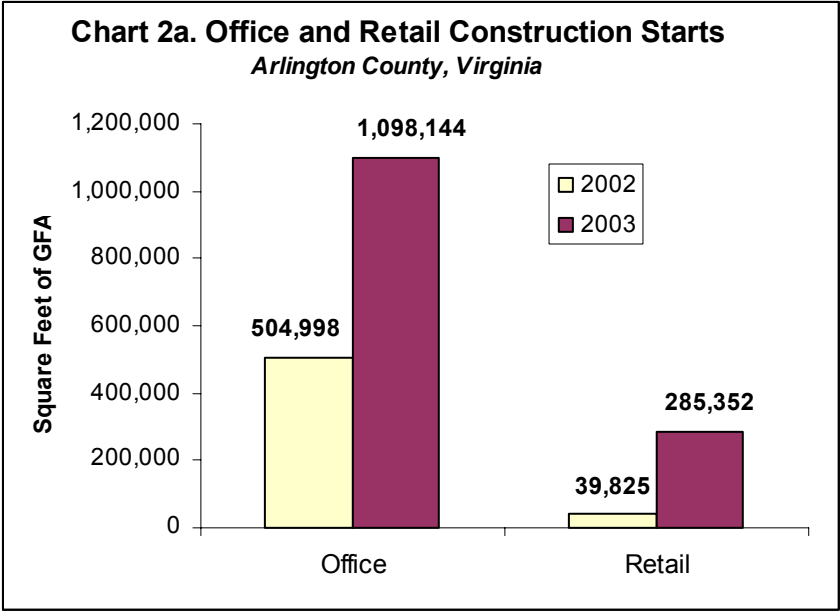


Table 3. Residential Construction Starts by Planning Area and Housing Type (2003)

Planning Area	Number of Units				
	Single-Family Detached	Townhouse	Garden	Highrise (5+ stories)	Total
Rosslyn	0	0	42	0	42
Court House	2	14	0	0	2
Clarendon	0	0	0	308	308
Virginia Square	0	0	0	0	0
Ballston	0	0	0	83	83
Pentagon City	0	0	0	0	0
Crystal City	0	0	215	0	215
Columbia Pike	0	4	53	0	57
Shirlington	0	0	0	0	0
East Falls Church	0	23	0	0	23
Lee Highway	0	0	74	0	74
Outside Planning Areas	149	15	0	0	164
County Total	151	56	384	391	982

Over the past four decades, the number of new residential construction starts (i.e., residential units authorized by building permit) has fluctuated significantly. The most recent peak of new residential construction was in 2000, when over 2,200 residential units started construction. Since then the number has declined slightly, and in 2003, less than half that number had started construction. However, Arlington continues to experience strong growth in residential development. The number of new construction starts in 2003 was still higher than at any time in the 1990s, with the exception of 1997.

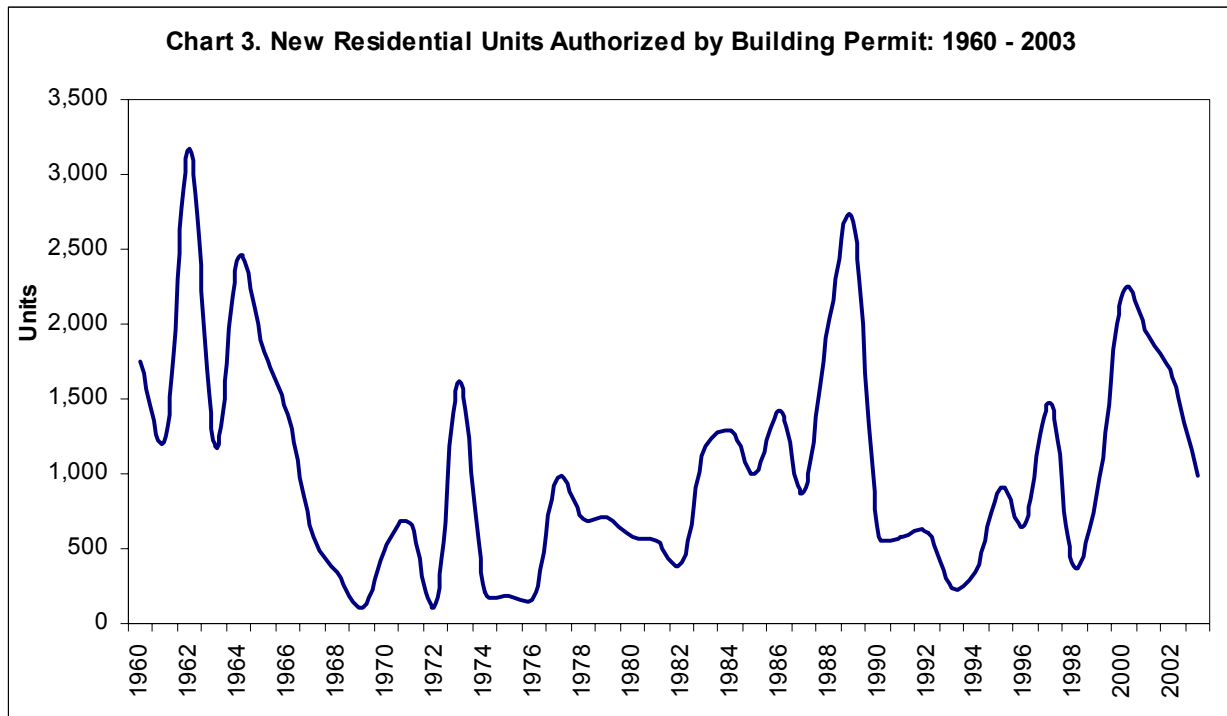


Table 4. Residential Units Authorized by Building Permits (1960 – 2003)

Year ^a	Arlington	Single-Family		Townhouse/ Duplex		Garden		Highrise/Midrise	
	Total Units	Units	% of Total	Units	% of Total	Units	% of Total	Units	% of Total
1960-1969	14,045	1,994	14%	283	2%	2,479	18%	9,289	66%
1970-1979	5,914	829	14%	1,405	24%	55	1%	3,625	61%
1980-1989	12,046	632	5%	2,701	22%	344	3%	8,369	69%
1990-1999	6,361	675	11%	775	12%	326	5%	4,585	72%
2000-2002	6,755	487	7%	253	4%	1,415	21%	4,600	68%
TOTAL	45,121	4,617	10%	5,417	12%	4,619	10%	30,468	68%
Detailed Annual Data									
1980	581	64	11%	343	59%	0	0%	174	30%
1981	557	58	10%	227	41%	0	0%	272	49%
1982	410	14	3%	261	64%	0	0%	135	33%
1983	1,190	54	5%	697	59%	32	3%	407	34%
1984	1,289	53	4%	215	17%	24	2%	997	77%
1985	1,000	72	7%	185	19%	0	0%	743	74%
1986	1,421	78	5%	311	22%	8	1%	1,024	72%
1987	884	71	8%	166	19%	33	4%	614	69%
1988	2,036	88	4%	180	9%	0	0%	1,768	87%
1989	2,678	80	3%	116	4%	247	9%	2,235	83%
1990	577	72	12%	69	12%	111	19%	325	56%
1991	583	50	9%	56	10%	15	3%	462	79%
1992	607	63	10%	46	8%	47	8%	451	74%
1993	239	65	27%	118	49%	56	23%	0	0%
1994	348	93	27%	78	22%	21	6%	156	45%
1995	909	82	9%	207	23%	76	8%	544	60%
1996	660	52	8%	139	21%	0	0%	469	71%
1997	1,468	55	4%	62	4%	0	0%	1,351	92%
1998	380	89	23%	116	31%	0	0%	175	46%
1999 ^b	970	143	15%	0	0%	0	0%	827	85%
2000	2,206	104	5%	91	4%	664	30%	1,347	61%
2001	1,916	122	6%	83	4%	367	19%	1,344	70%
2002	1,651	110	7%	23	1%	0	0%	1,518	92%
2003	982	151	15%	56	6%	384	39%	391	40%
TOTAL 1980-2003	25,542	1,883	7%	3,845	15%	2,085	8%	17,729	69%

^a Data for 1960 through 1998 are from Development Highlights During 1998 (PIR #49), August 1999. Data for 1999 are from U.S. Census Bureau, Permits by County. Data for 2000 through 2003 are from the Planning Division's development tracking database.

^b Multi-family units for 1999 could not be separated into Garden and Highrise/Midrise and are therefore included in the Highrise/Midrise category.

SITE PLAN APPROVALS

In 2003, seventeen projects were approved by the Arlington County Board through the site plan process. A total of 990,702 square feet of office GFA was approved as part of five projects—USPS Clarendon, FDIC Phase 2 in Virginia Square and 950 North Glebe Road and NRECA Phase II in Ballston. (NRECA Phase II was a major site plan amendment in 2003.)

The Board approved projects with a total of 1,968 residential units. These residential projects included several highrise apartment and condominium projects, such as 1800 Wilson Boulevard in Rosslyn, USPS Clarendon, 3409 Wilson Boulevard and Monroe Street Property in Virginia Square, Camden Potomac Yard and The Dakota on Center Park in Crystal City, and Alexan Shirlington Residential. Two new condominium projects were approved that maintain and redevelop existing affordable housing—Woodbury Park North in Court House and Monroe Apartments/Sierra Condominiums in Columbia Pike. Several townhouse projects were also approved in Ballston, Columbia Pike and East Falls Church.

All office and multi-family residential projects that were approved by the Arlington County Board in 2003 included associated ground floor retail. The most significant was the 80,000 square feet of retail approved as part of the Camden Potomac Yard residential site plan. A total of 134,846 square feet of retail GFA was approved by the County Board in 2003.

No hotel projects were approved by the County Board in 2003. Several hotels have been approved in previous years and have not yet started construction.

DEMOLITIONS

Each year, residential units and commercial space are demolished to make way for new development. In 2003, approximately 21,408 square feet of retail space and 303 residential units were demolished. The majority of the demolition activity in the County was in advance of the construction of a by-right condominium project in Rosslyn, The Odyssey residential project in Court House, Residences at Station Square in Clarendon, Hunters' Park and the Bromptons at Cherrydale residential projects on Lee Highway and the renovation and new construction of Monroe Apartments/Sierra Condominiums on Columbia Pike.

Of the 303 demolished units, 209 were garden apartment units and 94 were single-family houses.

Table 5. 2003 Site Plan Approvals and Major Site Plan Amendments

Site Plan No.	Planning Area	Project Name	Office (sq. ft.)	Retail (sq. ft.)	Other (sq. ft.) ^a	Res. Units	Status ^b	Site Plan Approval Date
371	Rosslyn	1800 Wilson Blvd	0	5,758	0	153	A	06/14/2003
364	Court House	Woodbury Park North	8,500	1,000	3,700	207	A	10/04/2003
333	Clarendon	USPS Clarendon	74,475	9,660	27,650	194	A	07/29/2003
248	Virginia Square	FDIC Phase 2 Office	410,364	5,108	0	0	U	03/18/2003
377	Virginia Square	3409 Wilson Boulevard	0	2,799	1,724	87	A	12/09/2003
378	Virginia Square	Monroe Street Property	0	0	0	79	A	10/18/2003
249	Ballston	NRECA Phase II	248,401	12,000	0	0	A	12/09/2003
331	Ballston	950 North Glebe Road	248,962	14,401	0	0	A	06/14/2003
370	Ballston	Wilson Blvd. Townhouses	0	0	0	5	A	04/26/2003
346	Crystal City	Camden Potomac Yard	0	4,120	0	386	A	12/09/2003
346	Crystal City	The Dakota on Center Park	0	80,000	0	479	A	12/09/2003
368	Columbia Pike	Sierra Condominiums	0	0	0	53	U	02/08/2003
373	Columbia Pike	South Glebe Road Residential	0	0	0	22	A	09/16/2003
376	Columbia Pike	Alcova Row	0	0	0	22	A	05/17/2003
106	Shirlington	Alexan Shirlington Residential	0	0	0	245	A	10/18/2003
375	East Falls Church	Westmoreland Street Townhouses	0	0	0	18	A	06/14/2003
367	Outside Planning Areas	North Danville Street Condos	0	0	0	18	A	03/18/2003

^a "Other" includes community space, fire stations, schools, etc.

^b Status: U=Under construction (as of 12/31/2003); A=Approved but not yet Under Construction.

Table 6. Demolitions of Residential Units (1980 – 2003)

Year ^a	Arlington	Single-Family		Townhouse/ Duplex		Multi-Family	
		Total Units	Units	% of Total	Units	% of Total	Units
1980	51	51	100%	0	0%	0	0%
1981	199	32	16%	0	0%	167	84%
1982	91	18	20%	0	0%	73	80%
1983	64	46	72%	0	0%	18	28%
1984	150	47	31%	2	1%	101	67%
1985	139	59	42%	0	0%	80	58%
1986	36	36	100%	0	0%	0	0%
1987	146	33	23%	0	0%	113	77%
1988	80	58	73%	10	13%	12	15%
1989	100	83	83%	3	3%	14	14%
1990	247	66	27%	2	1%	179	72%
1991	19	19	100%	0	0%	0	0%
1992	141	24	17%	0	0%	117	83%
1993	30	30	100%	0	0%	0	0%
1994	97	29	30%	2	2%	66	68%
1995	50	45	90%	2	4%	3	6%
1996	52	32	62%	4	8%	16	31%
1997	53	28	53%	4	8%	21	40%
1998	118	63	53%	0	0%	54	46%
1999	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2000	872	50	6%	0	0%	822	94%
2001	253	52	21%	0	0%	201	79%
2002	96	63	66%	2	2%	31	32%
2003	303	94	31%	0	0%	209	69%
TOTAL 1980- 2003	3,084	1,058	34%	31	1%	2,297	74%