

Housing Production – Are We on Track?

Executive Board

October 22, 2026



Puget Sound Regional Council

Background



The Regional Housing Strategy was adopted by the Executive Board in February 2022.

PSRC provides ongoing updates, resources, and support throughout strategy implementation.

This presentation continues that work, monitoring and presenting the state of the region's housing landscape.



Goal of Analysis



Is housing being produced in the region, and where?

- Measure overall housing production (OFM April 1 estimates)
- Compare to adopted housing targets



Caveats



This **analysis tracks total units produced**, regardless of AMI (Area Median Income), where adopted housing targets are grouped by AMI.

Production is not linear, especially for small jurisdictions.

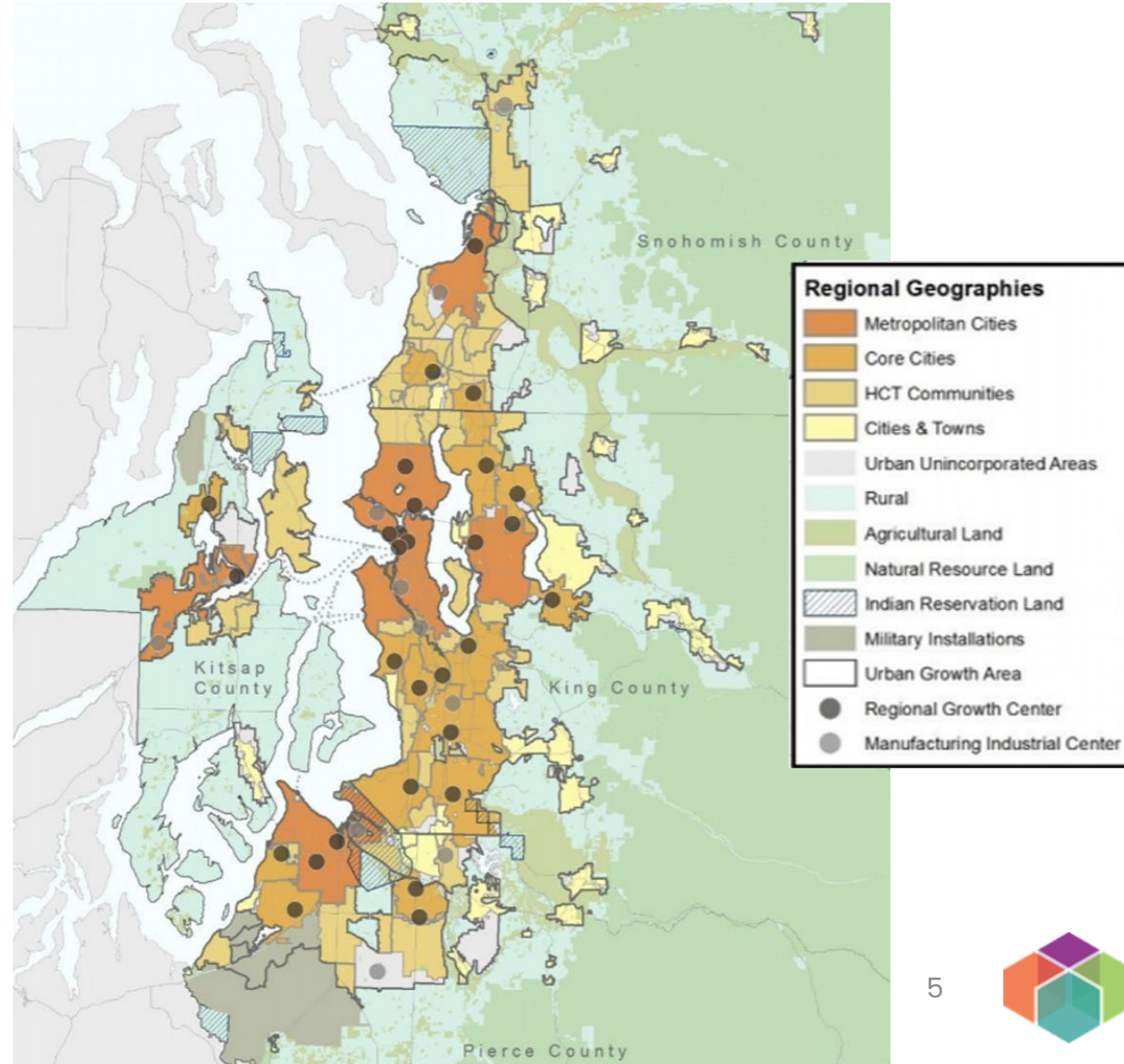
Starting years vary: **2019** for King & **2020** for Kitsap, Pierce, Snohomish



Regional Geographies

The region includes

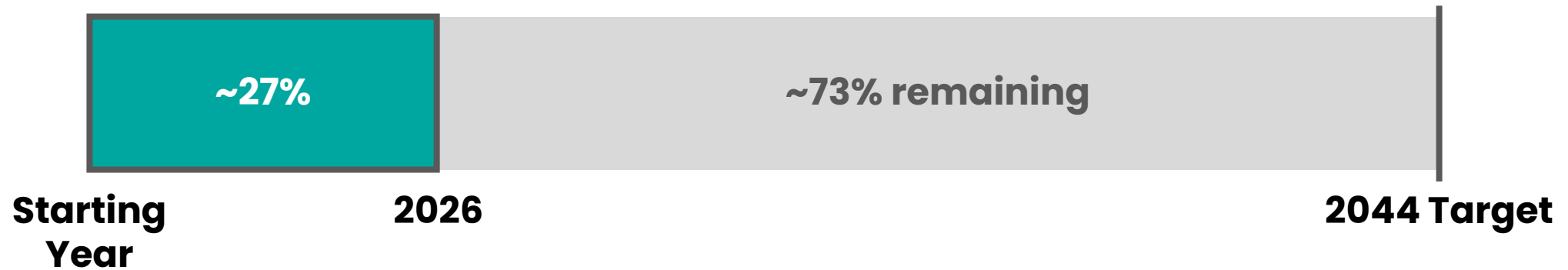
- **5** Metropolitan Cities
- **17** Core Cities
- **20** High-Capacity Transit (HCT) Communities
- **44** Cities & Towns



Progress Towards Regional Targets

■ Needed by 2026
■ Units Produced

The **region is now ~27% through** the growth period with lots of runway left to meet housing targets



Example Jurisdiction

■ Needed by 2026
■ Units Produced

Example A is behind on housing production in 2026,
and needs production to increase



Example Jurisdiction

■ Needed by 2026
■ Units Produced

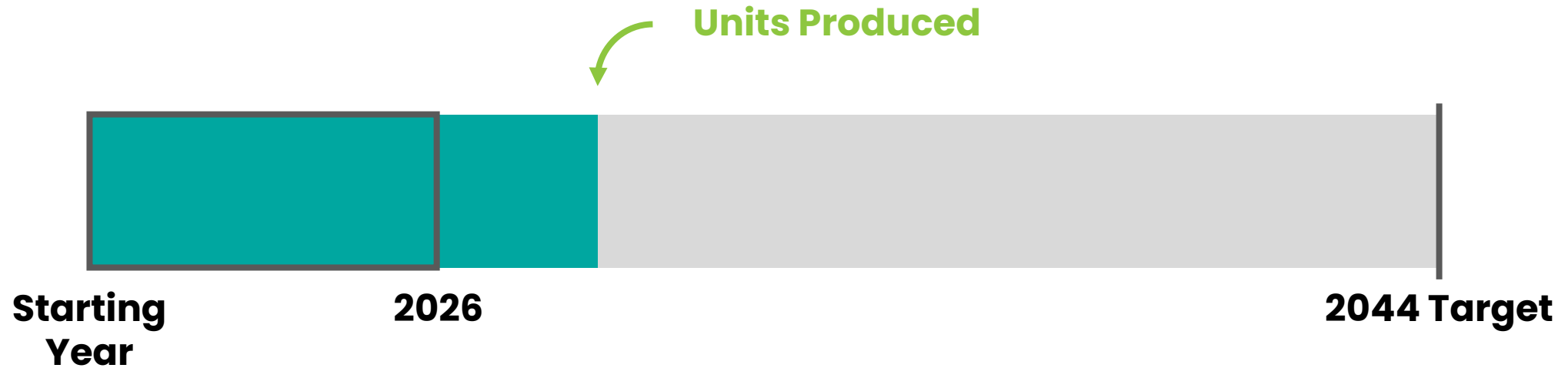
Example B is on track and must keep pace to meet 2044 target



Example Jurisdiction

■ Needed by 2026
■ Units Produced

Example C is seeing production rise quickly, providing wiggle room for years with slower production



Data Results



2026 Progress – Region

▣ Needed by 2026
■ Units Produced

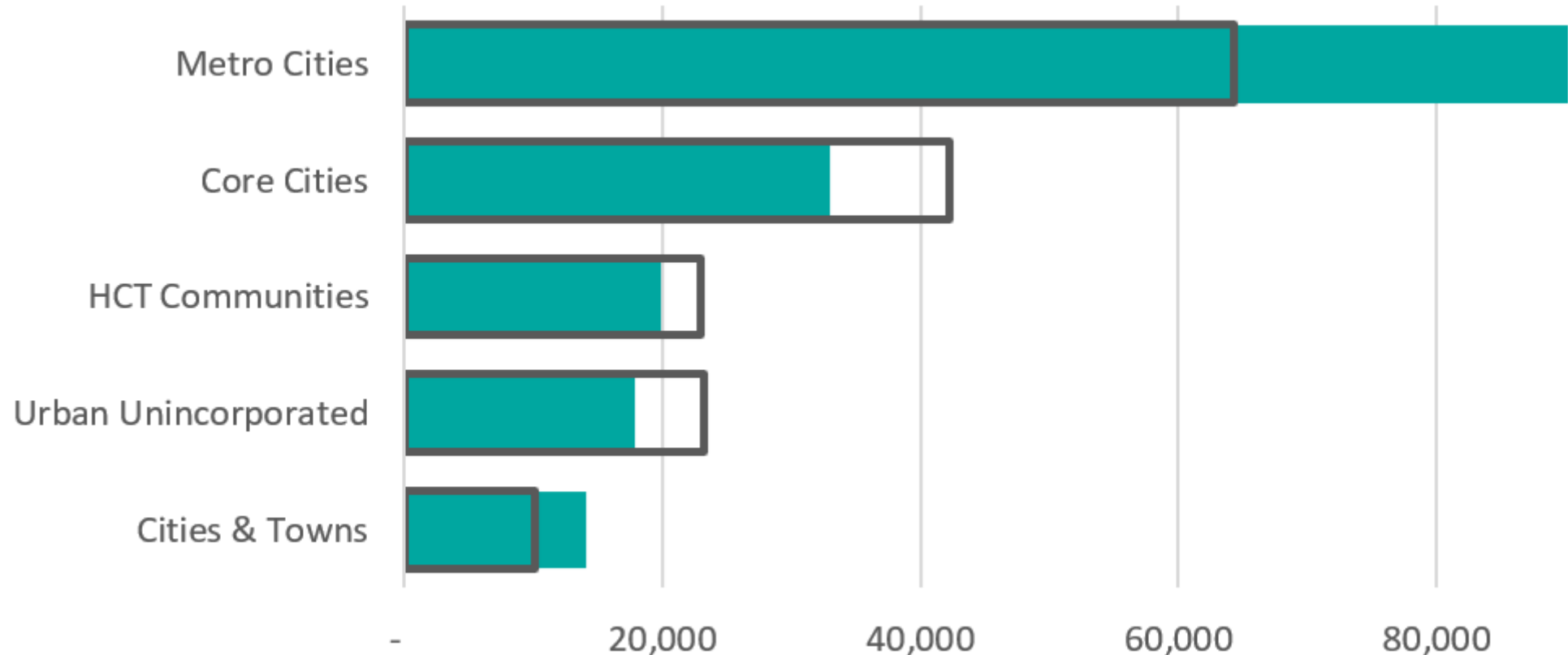
The region has seen production rise quickly this decade, though **this is led by just a handful of jurisdictions**



2026 Progress – Regional Geographies

■ Needed by 2026
■ Units Produced

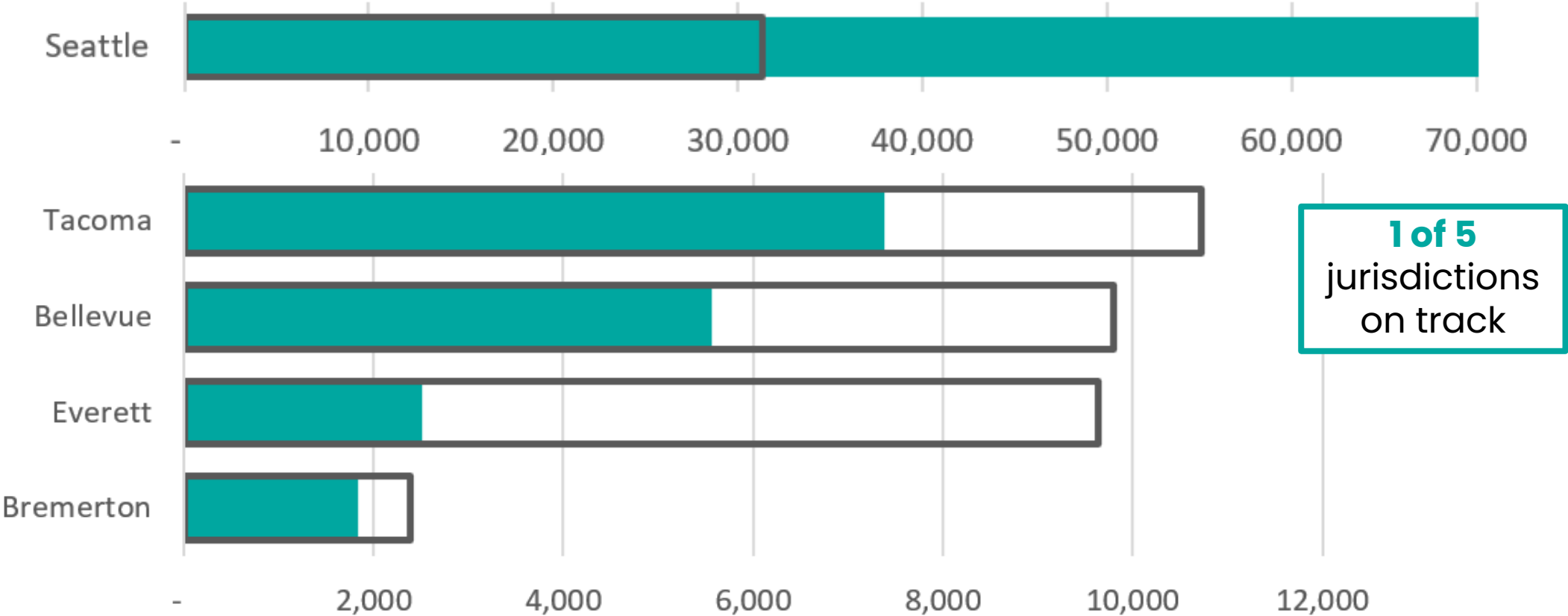
Only two of the five regional geographies are **on track**,
with Core Cities falling the furthest behind



2026 Progress – Metro Cities

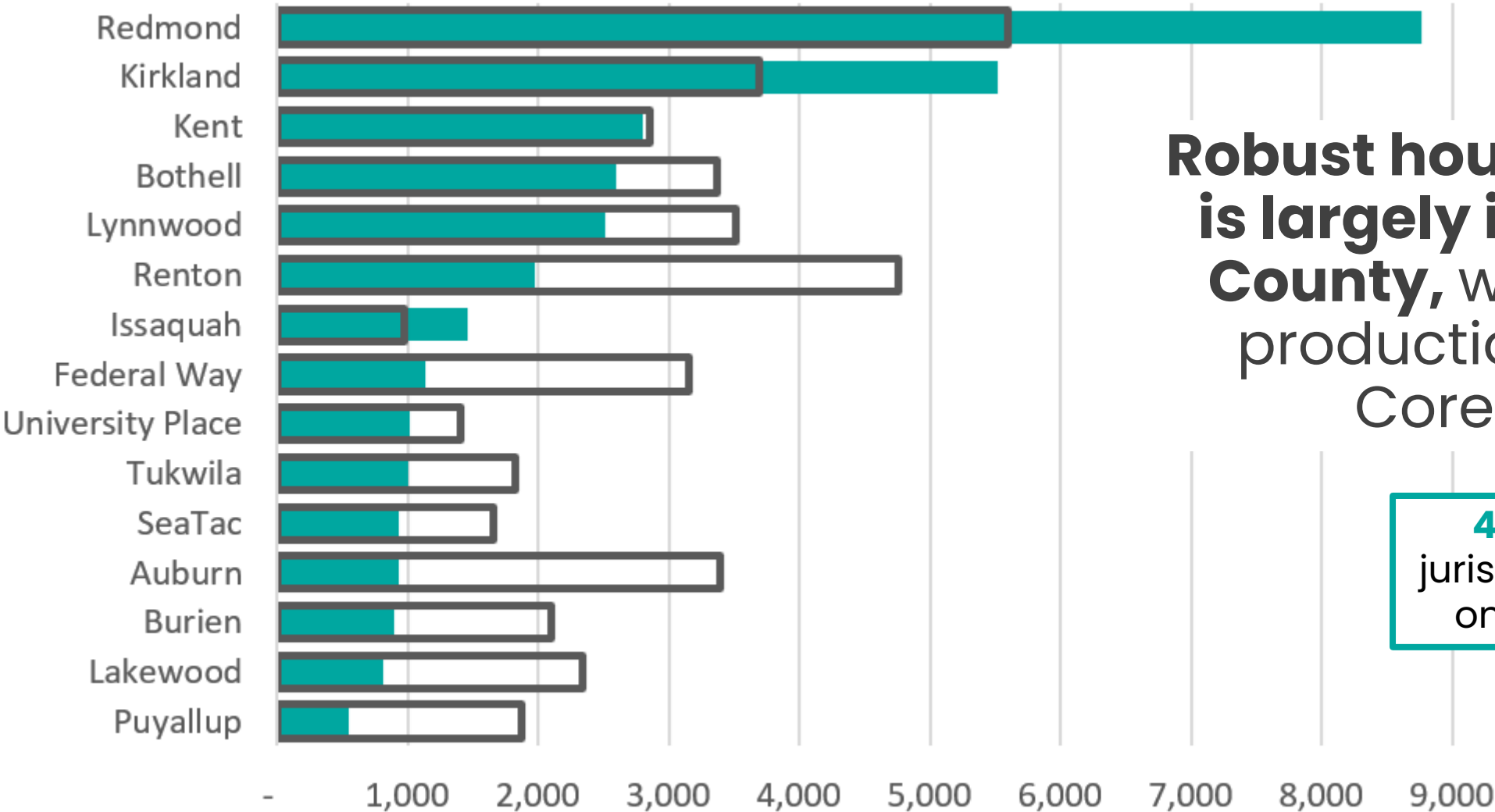
Needed by 2026
Units Produced

Most metro cities are behind on housing production, with only Seattle producing quickly



2026 Progress – Core Cities

Needed by 2026
Units Produced



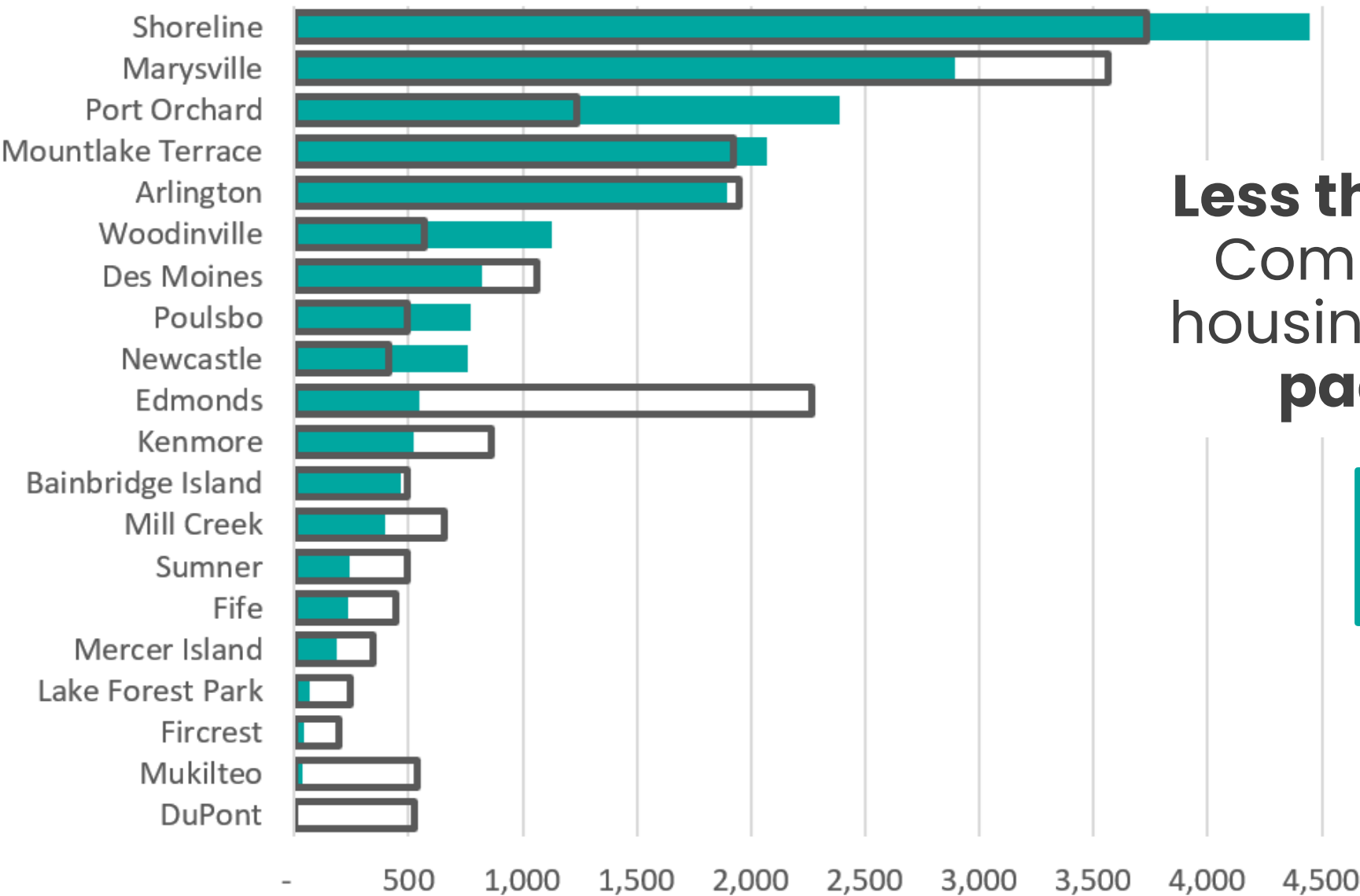
Robust housing growth is largely in East King County, with lagging production in most Core Cities

4 of 15
jurisdictions
on track



2026 Progress – HCT Communities

Needed by 2026
Units Produced



Less than half of HCT Communities saw housing **produced at pace for 2026**

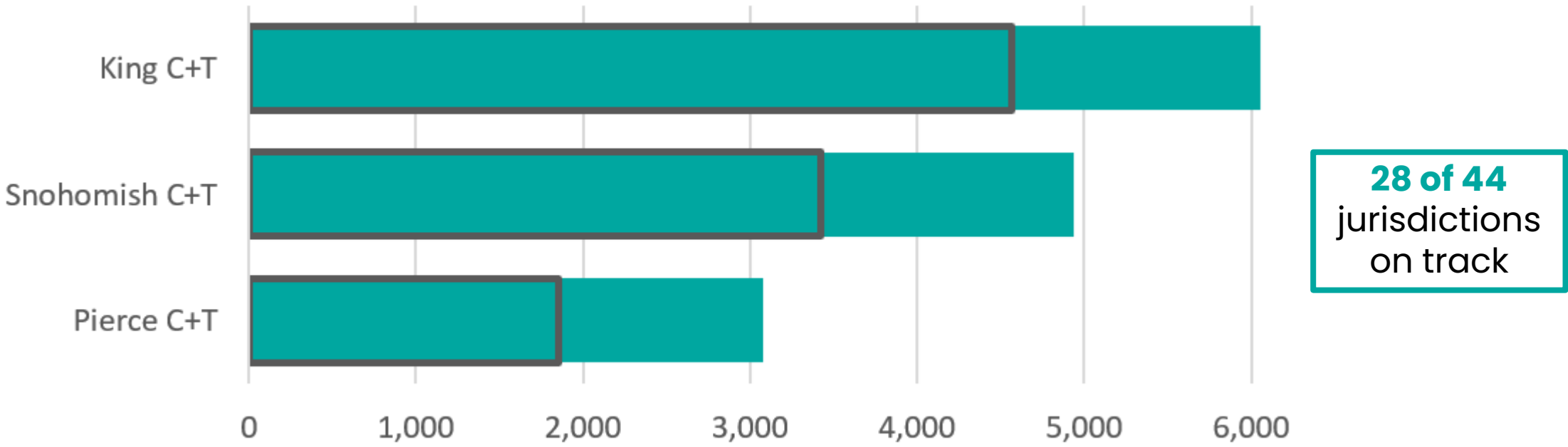
9 of 20 jurisdictions on track



2026 Progress – Cities & Towns

Needed by 2026
Units Produced

Just **over half** of all Cities & Town jurisdictions
are growing at pace



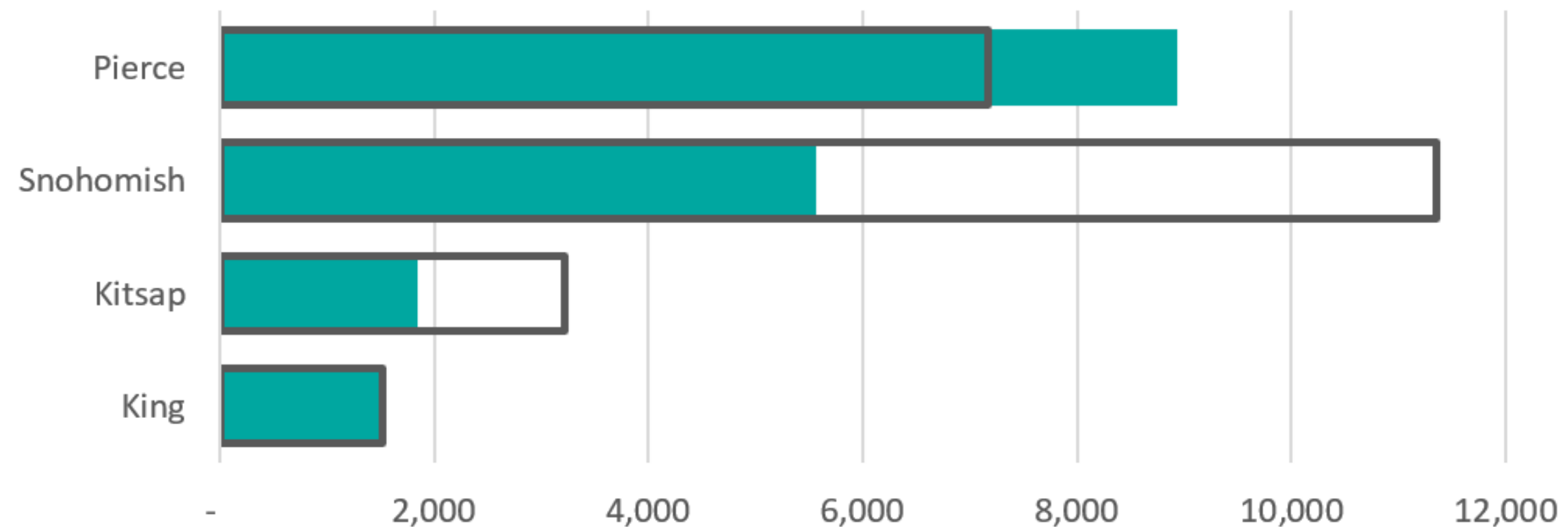
28 of 44
jurisdictions
on track



2026 Progress – Urban Unincorporated

Needed by 2026
Units Produced

Production in urban unincorporated areas varies by county, with **Snohomish and Kitsap falling the furthest behind**



Takeaways



Overall Takeaways

The region is producing housing at pace to meet its housing targets, but this is largely **led by a handful of jurisdictions**

These jurisdictions **can offer a blueprint to others** looking to boost production and meet their housing targets



Overall Takeaways

With 27% of the growth period passed, **there is a lot of runway left** to increase production

However, **a broader slowdown in production is coming** as permit applications decline



Overall Takeaways

Across the region, recent updates to **comprehensive plans made significant changes to spur housing production**

These changes may not yet be reflected in the data



Overall Takeaways

Much of today's production serves higher-income households. **More must be done to produce housing for households earning less than 80% AMI**

We hope to use these results to inform an updated Regional Growth Strategy and VISION 2060



Thank you!

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Puget Sound Regional Council