



# Update to District Supply and Demand Analysis – *Water Demand Committee*

David J. Stoldt  
General Manager

April 6, 2023



# Adopted Residential Demand by Jurisdiction

	Monterey	Pacific Grove	Carmel-by-the-Sea	Seaside	Del Rey Oaks	Sand City	County	TOTAL
Population in 2020	28,170	15,265	3,949	33,537	1,662	385	8,916	91,884
Population in 2045	29,639	15,817	3,984	38,316	2,650	1,198	9,916	101,520
Increase	5.2%	3.6%	0.9%	14.2%	59.4%	211.2%	11.2%	10.5%
Acre-Feet in 2020	1,675	908	413	1,015	92	21	2,221	6,345
Acre-Feet by 2045	1,762	941	417	1,160	146	65	2,471	6,961
AF Served by Others	9	-	-	72	11	-	75	167
Net AF in 2045	1,753	941	417	1,087	135	65	2,396	6,795

# Adopted Non-Residential Demand by Jurisdiction

	Monterey	Pacific Grove	Carmel-by-the-Sea	Seaside	Del Rey Oaks	Sand City	County	TOTAL
Jobs in 2020	40,989	8,016	3,566	10,476	748	2,092	4,300	70,187
Jobs in 2045	45,509	8,445	3,915	11,543	834	2,259	4,721	77,226
Increase	11.0%	5.4%	9.8%	10.2%	11.5%	8.0%	9.8%	10.0%
Non-Residential AF in 2020	1,547	332	225	336	22	66	853	3,380
Non-Residential AF in 2045	1,718	349	247	370	24	71	936	3,716
Increase	171	18	22	34	3	5	83	336

# Overall Summary of Demand

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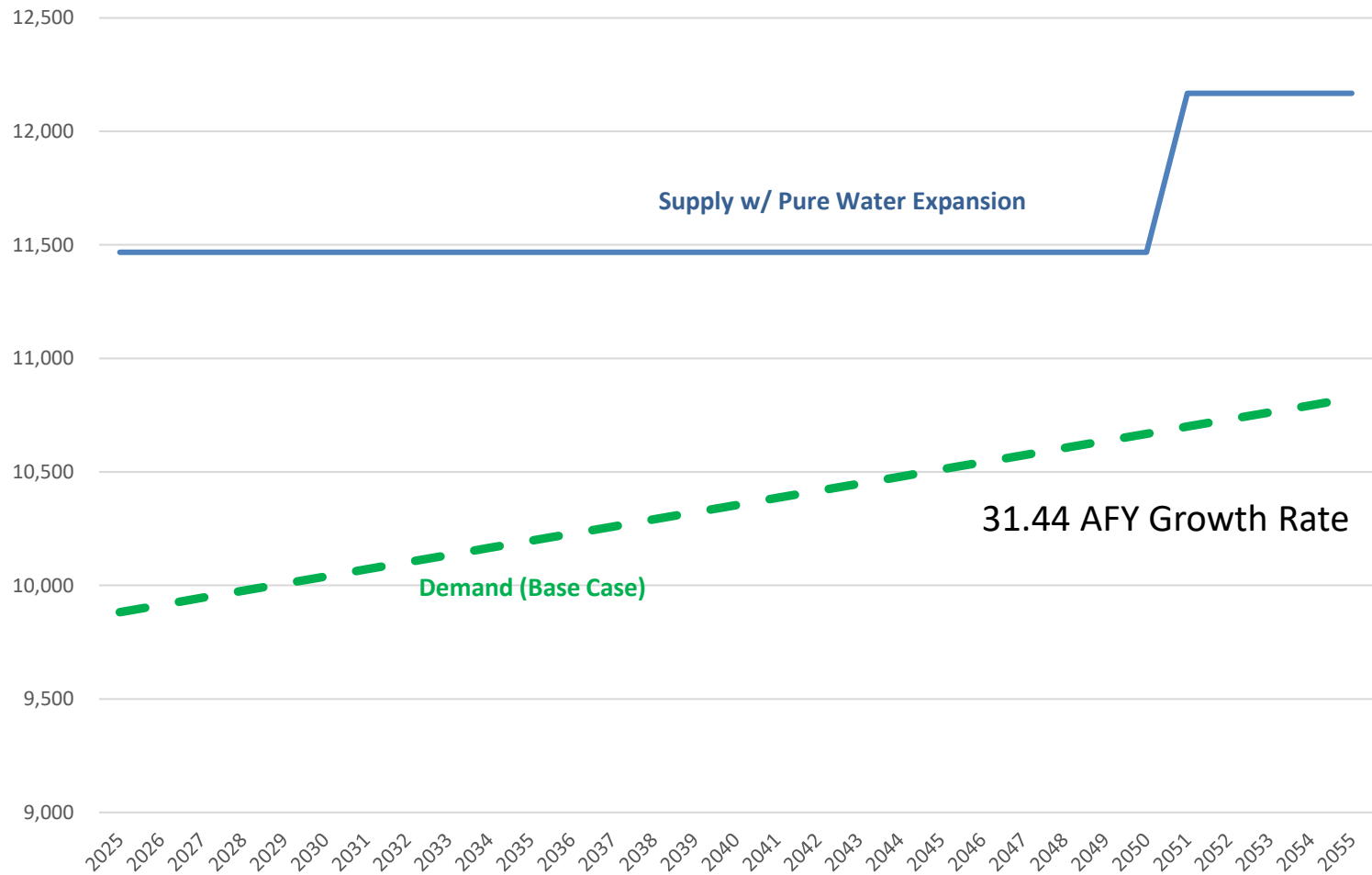
## Present & Future Water Needs

	Base Year (2020)	Estimate For 2045 AMBAG	AF per Year
Net Water for Population	6,345 AF	6,795 AF	18.00
Water for Non- Residential	3,380 AF	3,716 AF	13.44
Total	9,725 AF	10,511 AF	31.44

## Demand Forecast

	2020	2025	2030	2035	2040	2045	2050	2055
Water Demand - AF	9,725	9,882	10,039	10,196	10,353	10,511	10,668	10,825

# Supply v Demand



# 6<sup>th</sup> Cycle RHNA Plan

Table 1 – RHNA for the AMBAG Region, June 30, 2023 to December 15, 2031

Region	Income Group Totals				RHNA
	Very Low	Low	Mod.	Above Mod.	Total
Region	7,868	5,146	6,167	14,093	33,274
Monterey County					
Carmel-By-The-Sea	113	74	44	118	349
Del Rey Oaks	60	38	24	62	184
Gonzales	173	115	321	657	1,266
Greenfield	101	66	184	379	730
King City	97	63	178	364	702
Marina	94	62	173	356	685
Monterey	1,177	769	462	1,246	3,654
Pacific Grove	362	237	142	384	1,125
Salinas	920	600	1,692	3,462	6,674
Sand City	59	39	49	113	260
Seaside	86	55	156	319	616
Soledad	100	65	183	376	724
Unincorporated Monterey	1,070	700	420	1,136	3,326
Santa Cruz County					
Capitola	430	282	169	455	1,336
Santa Cruz	859	562	709	1,606	3,736
Scotts Valley	392	257	154	417	1,220
Watsonville	283	186	521	1,063	2,053
Unincorporated Santa Cruz	1,492	976	586	1,580	4,634

20,295  
in MoCo

**Draft 6<sup>th</sup> Cycle Regional Housing Needs Allocation Plan 2023-2031**

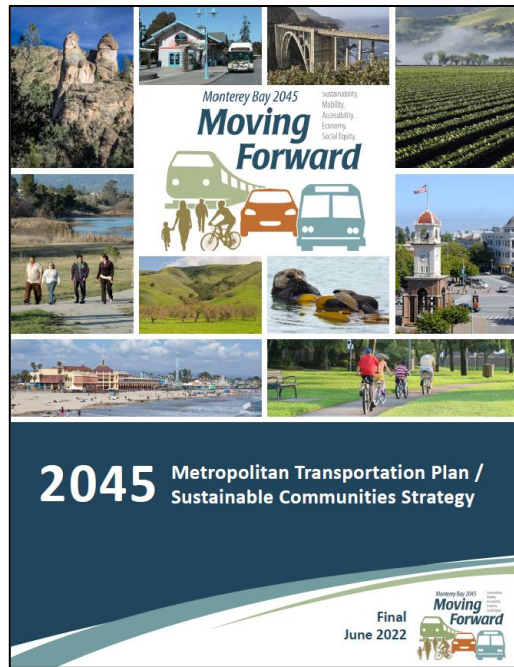
April 2022

Association of Monterey Bay Area Governments



From “Timeline” page 13: “May 2022 – AMBAG releases final 2045 Metropolitan Transportation Plan/Sustainable Communities Strategy (MTP/SCS) **accommodating RHNA**”

# AMBAG MTP/SCS



Page 4-38: “The 2045 MTP/SCS includes an updated RHNA. The 6th Cycle Regional Housing Needs Determination (RHND) from HCD to AMBAG is 33,274 units.

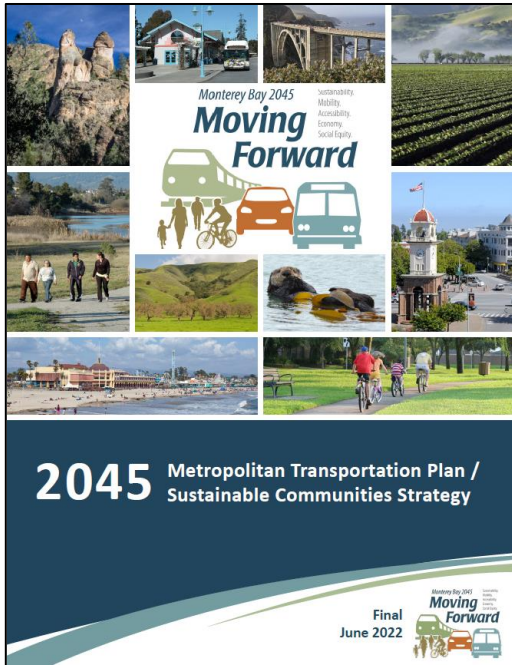
SB 375 now links the RHNA and MTP/SCS processes to better integrate housing, land use, and transportation planning. Integrating processes helps ensure that the state’s housing goals are met. The RHNA occurs before each housing element cycle, which SB 375 changed from a five-year to an eight-year cycle.

The AMBAG region received its RHNA Determination (for Monterey and Santa Cruz Counties) from HCD for the housing element cycle (2023-2031). The AMBAG RHNA Plan allocates the RHNA Determination by jurisdiction. Based on the RHNA Plan each jurisdiction will need to identify adequate sites to address its RHNA allocations in the four income categories when updating its housing element.

Monterey and Santa Cruz Counties have enough housing capacity to accommodate the RHNA allocations. The allocations do not exceed forecasted growth and can be accommodated through infill and redevelopment. The AMBAG and SBtCOG RHNA Plans are under development and are expected to be consistent with the 2045 MTP/SCS.”



# AMBAG MTP/SCS



Monterey County additions from 2020-2045 = 23,564 which is 3,269 more than RHNA

Table 1-3: Housing Units

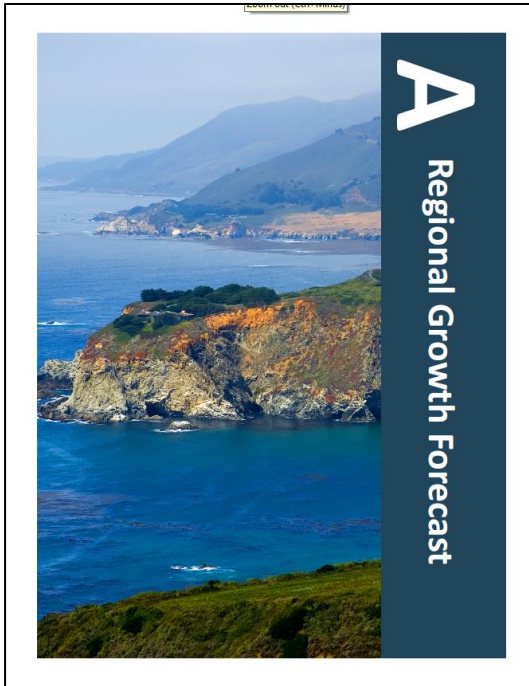
Geography	2015	2020	2025	2030	2035	2040	2045	Compound Annual Growth Rate	Change Over Forecast Period
<b>AMBAG Region</b>	<b>262,660</b>	<b>267,812</b>	<b>277,645</b>	<b>288,386</b>	<b>296,352</b>	<b>301,307</b>	<b>304,900</b>	<b>0.52%</b>	<b>13.85%</b>
<b>Monterey County</b>	<b>139,177</b>	<b>141,764</b>	<b>146,716</b>	<b>153,852</b>	<b>159,100</b>	<b>162,612</b>	<b>165,328</b>	<b>0.62%</b>	<b>16.62%</b>
Carmel-By-The-Sea	3,417	3,437	3,437	3,442	3,450	3,453	3,459	0.03%	0.64%
Del Rey Oaks	741	741	762	809	848	1,052	1,195	1.93%	61.27%
Gonzales	1,987	1,987	2,399	3,630	4,182	4,474	4,626	3.44%	132.81%
Greenfield	3,794	3,981	4,359	4,766	5,047	5,164	5,238	1.10%	31.57%
King City	3,283	3,432	3,672	4,002	4,282	4,356	4,403	1.00%	28.29%
Marina	7,334	7,784	8,277	8,837	9,265	9,521	9,693	0.88%	24.52%
Monterey	13,637	13,705	13,705	13,920	14,209	14,402	14,549	0.24%	6.16%
Pacific Grove	8,184	8,201	8,214	8,267	8,336	8,400	8,463	0.13%	3.19%
Salinas	43,001	43,411	45,552	48,673	50,968	52,229	53,150	0.81%	22.43%
Sand City	176	189	198	228	333	446	526	4.18%	178.31%
Seaside	10,913	10,920	11,437	11,925	12,248	12,604	13,192	0.76%	20.81%
Soledad	3,927	4,137	4,433	4,733	5,024	5,240	5,426	1.09%	31.16%
Balance of County	38,783	39,839	40,271	40,620	40,908	41,271	41,408	0.15%	3.94%
<b>San Benito County</b>	<b>18,262</b>	<b>19,913</b>	<b>21,721</b>	<b>23,333</b>	<b>24,773</b>	<b>25,452</b>	<b>25,775</b>	<b>1.04%</b>	<b>29.44%</b>
Hollister	10,757	11,917	12,501	13,177	13,701	14,054	14,122	0.68%	18.50%
San Juan Bautista	750	819	878	918	951	965	975	0.70%	19.05%
Balance of County	6,755	7,177	8,342	9,238	10,121	10,433	10,678	1.60%	48.78%
<b>Santa Cruz County</b>	<b>105,221</b>	<b>106,135</b>	<b>109,208</b>	<b>111,201</b>	<b>112,479</b>	<b>113,243</b>	<b>113,797</b>	<b>0.28%</b>	<b>7.22%</b>
Capitola	5,537	5,554	5,786	5,970	6,009	6,017	6,017	0.32%	8.34%
Santa Cruz	23,535	23,954	24,988	25,578	25,974	26,295	26,525	0.41%	10.73%
Scotts Valley	4,691	4,739	4,798	4,846	4,869	4,887	4,930	0.16%	4.03%
Watsonville	14,131	14,226	14,829	15,629	16,108	16,347	16,519	0.60%	16.12%
Balance of County	57,327	57,662	58,807	59,178	59,519	59,697	59,806	0.15%	3.72%

Source: AMBAG 2022 Regional Growth Forecast



# AMBAG Regional Growth Forecast

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The population, housing, and employment forecasts in the Executive Summary of the MTP/SCS are identical to those in the AMBAG 2022 Regional Growth Forecast, contained in Appendix A of the AMBAG 2045 MTP/SCS.

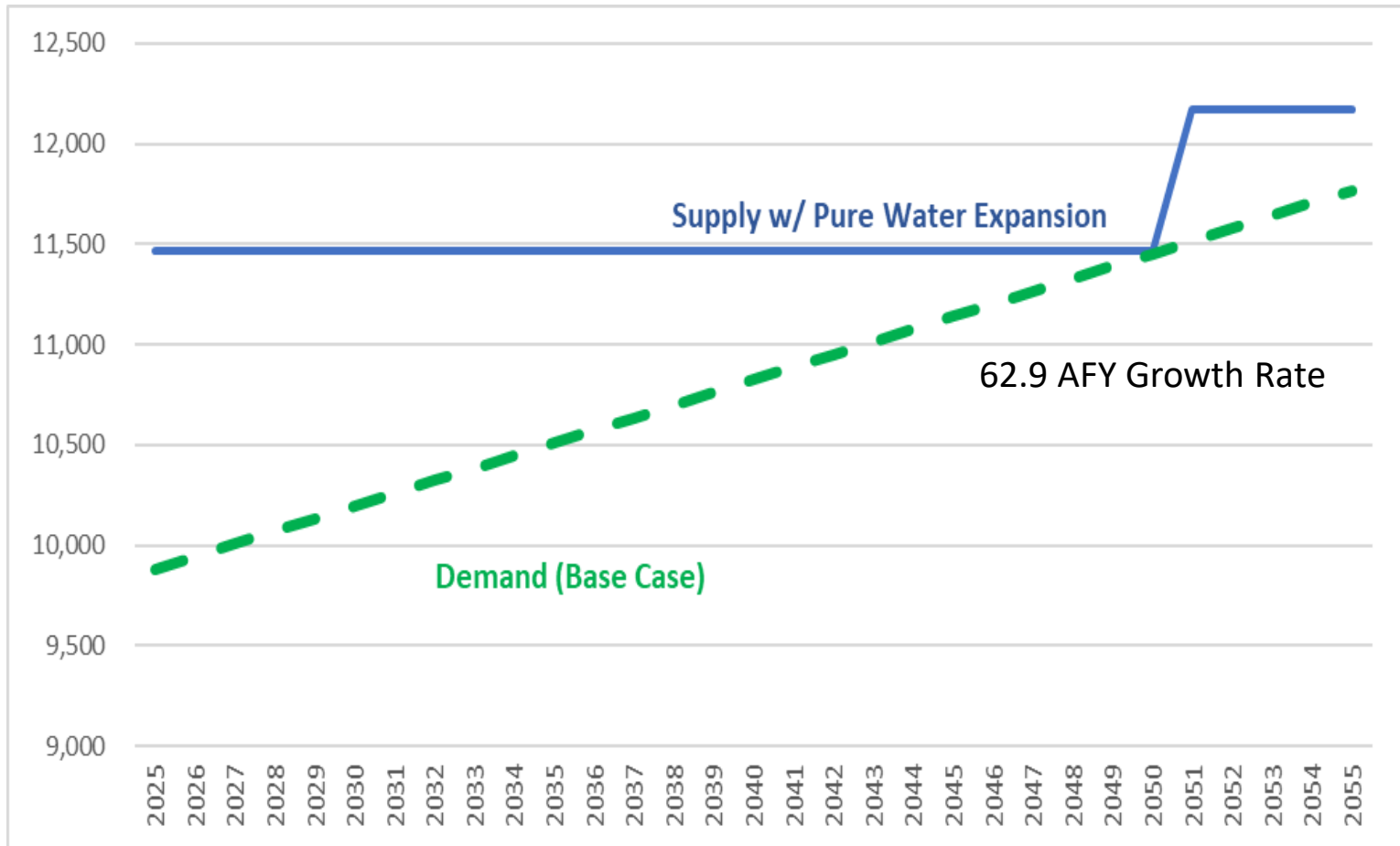
# Projected RHNA Demand by Jurisdiction

	Monterey	Pacific Grove	Carmel-by-the-Sea	Seaside	Del Rey Oaks	Sand City	County	TOTAL
AMBAG RGF #	844	262	22	2,272	454	337	n/a	4,191
AMBAG RHNA #	3,654	1,125	349	616	184	260	300	6,488
Served by Others	365			308	37		90	800
Net RHNA #	3,289	1,125	349	308	147	260	210	5,688
Water Required for Net RHNA	395	135	42	37	18	31	25	683
AF per year over 30 year forecast:								22.8

	TOTAL RHNA GOAL	Water Required (AFA)	Factor Used
Very Low	1,857	175	0.0945 AFA (multi-family)
Low	1,212	115	0.0945 AFA (multi-family)
Moderate	877	120	0.13725 (half single-family/half multi-family)
Above Moderate	2,242	340	0.1515 (2/3 single-family/1/3 multi-family)
<b>Total Allocation/Water Required</b>	<b>6,188</b>	<b>750</b>	<b>Average = 0.12 AF/Unit</b>

The Adopted Supply & Demand Report had 18.0 AFY for population growth; RHNA might imply 22.8 AFY, or a 4.8 AFY difference; 144 AF over 30 years

# Supply v Demand, Assuming 2X AMBAG Forecast



# **Water Demand Committee for Thursday, April 6, 2023**

**MS PowerPoint Distributed to the  
General Manager, District Counsel and  
Board Members**