



Loudoun County

VIRGINIA

WHERE TRADITION MEETS INNOVATION

2025 Loudoun County Residential Pipeline

Summary of Findings – November 2025

What is the Residential Pipeline Report?

Approved Units

- By-right or legislative projects
- Refined by actual subdivisions

Built Units

- Based upon building permits issued for new residential units

Remaining Units

- Approved units minus built units

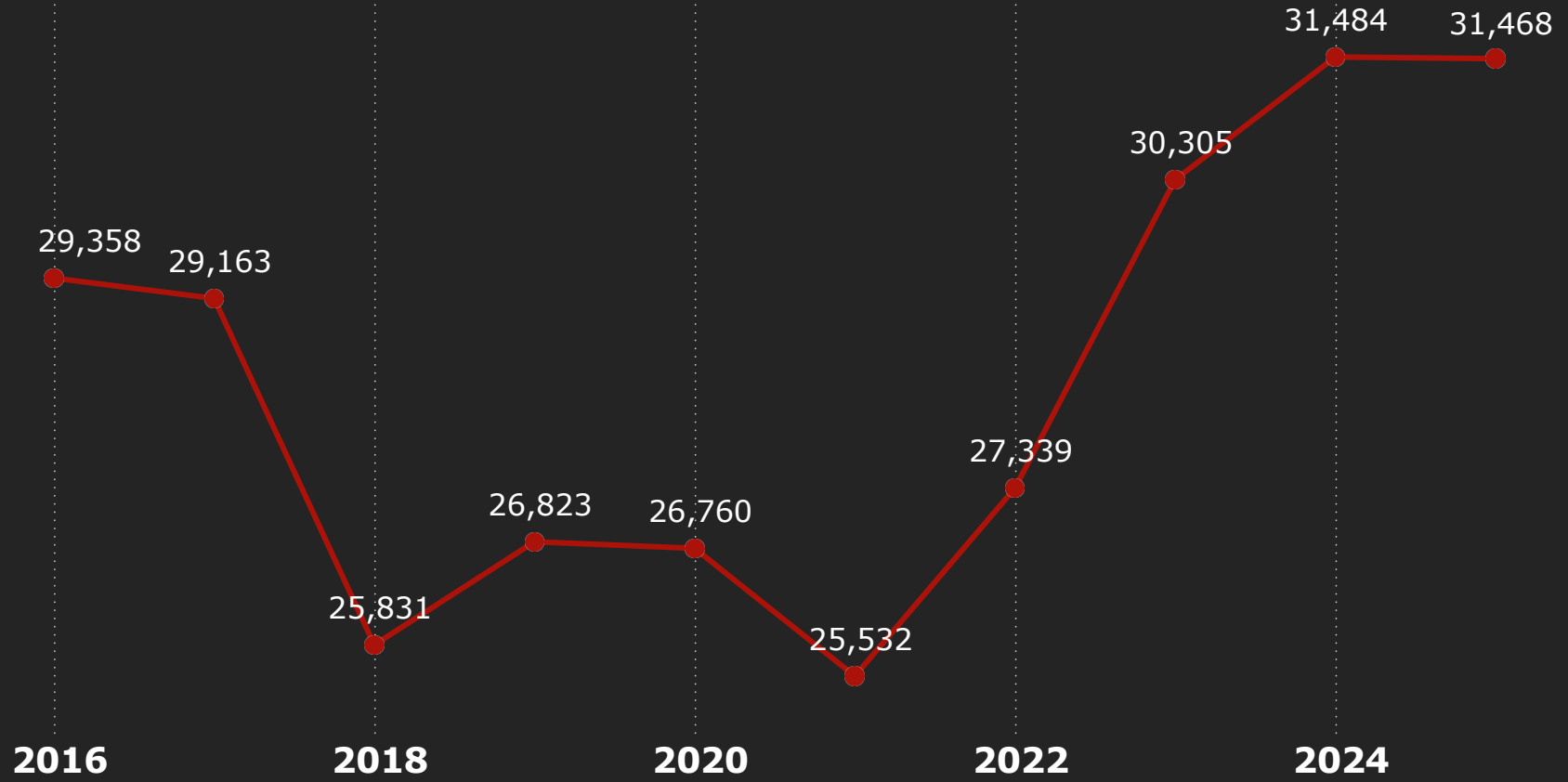
What is the Residential Pipeline Report?

- Reporting Period: July 1, 2024 – June 30, 2025
- Tracks Major Projects with 10+ units
- Tracks Attainable Dwelling Units and Age Restricted Units

Pipeline Summary

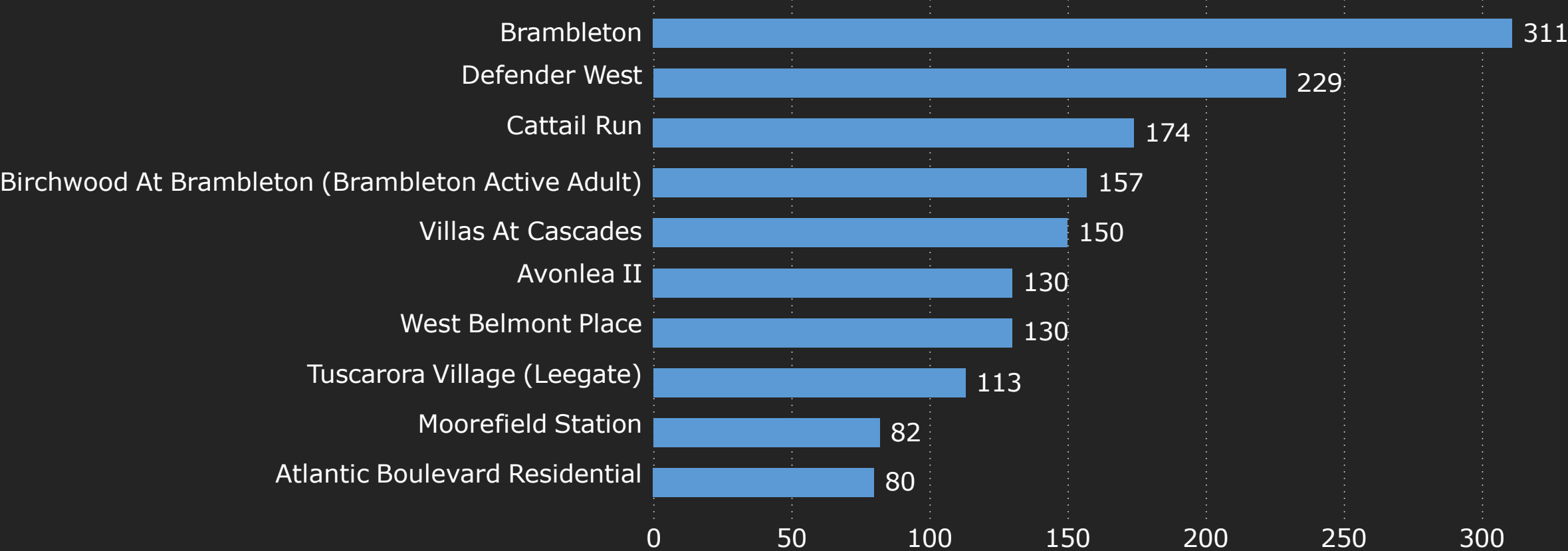
Total Remaining Units - 2016 to 2025

Year	Projects	Units
2016*	129	29,358
2017	208	29,163
2018	191	25,831
2019	130	26,823
2020	128	26,760
2021	119	25,532
2022	131	27,339
2023	127	30,305
2024	133	31,484
2025	150	31,468



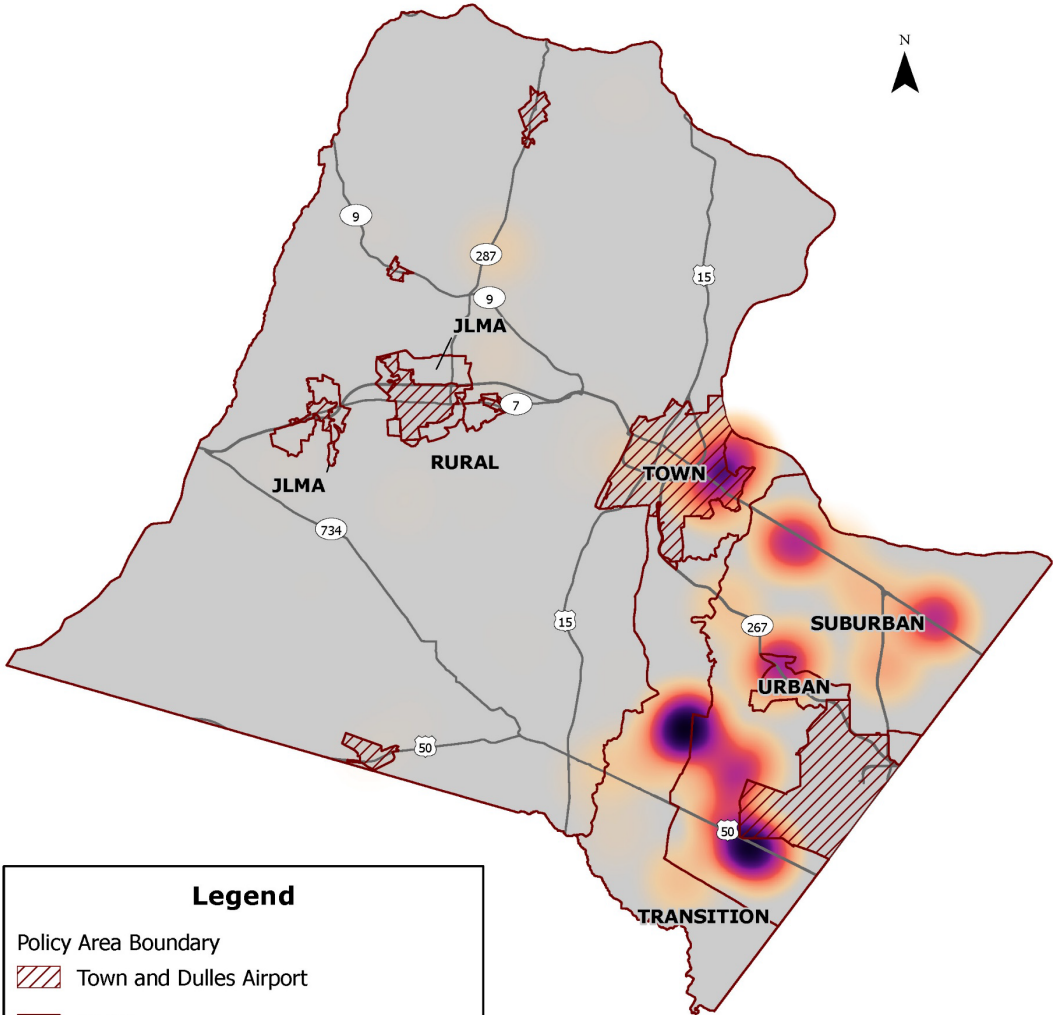
* Transition to Fiscal Year (18-month window)

Projects with the most permitted units in Fiscal Year 2025



Loudoun County New Residential Building Permits

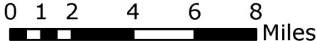
Countywide; July 1, 2024 - June 30, 2025 (2,458 Total)*



Legend

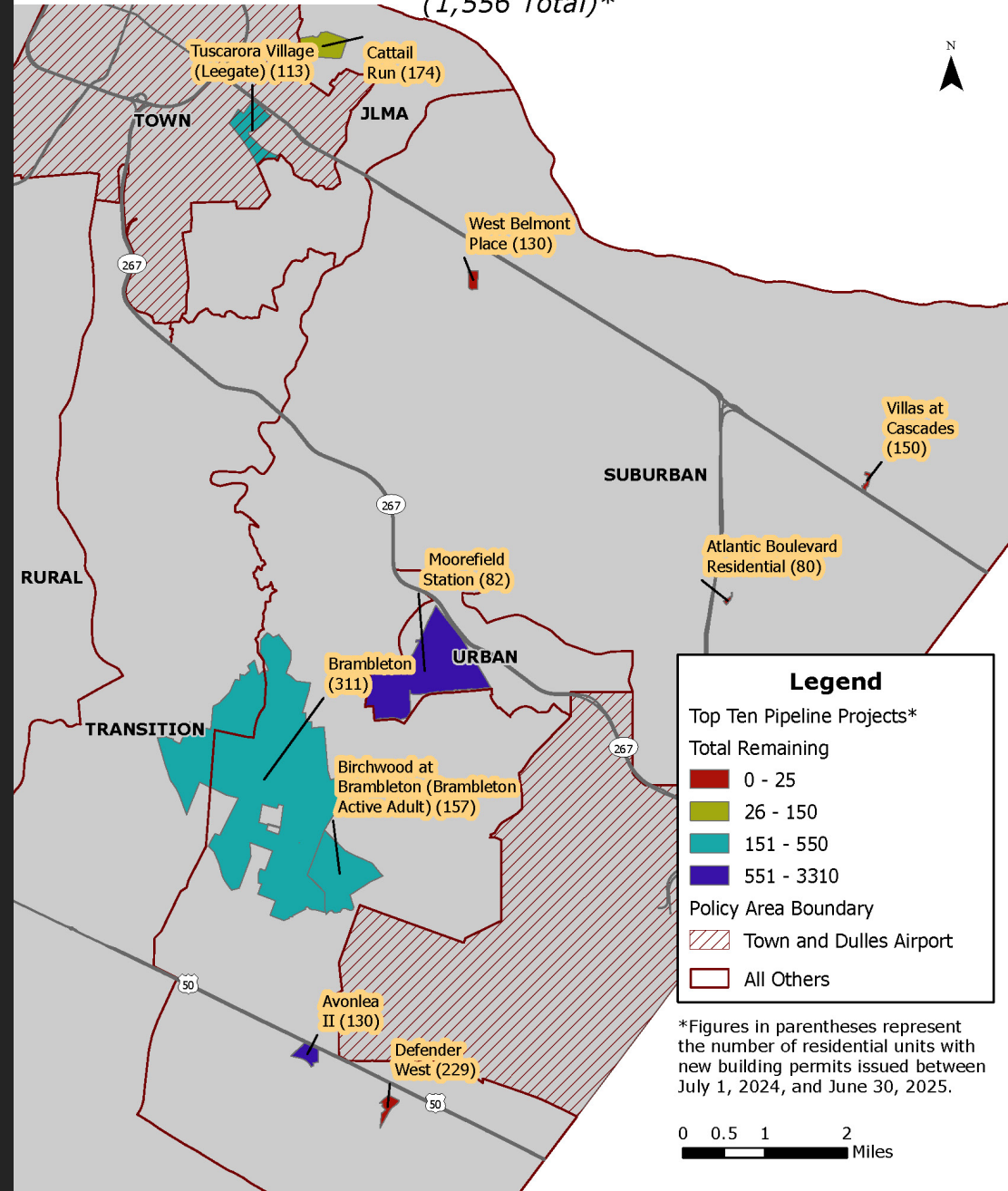
- Policy Area Boundary
- Town and Dulles Airport
- All Others
- Low Concentration of Permits
- High Concentration of Permits

*Darker areas represent higher concentrations of residential building permits. Lighter areas represent lower concentrations of residential building permits.



Loudoun County New Residential Building Permits Top Ten Highest Developments; July 1, 2024 - June 30, 2025

(1,556 Total)*



Legend

Top Ten Pipeline Projects*

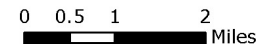
Total Remaining

- 0 - 25
- 26 - 150
- 151 - 550
- 551 - 3310

Policy Area Boundary

- Town and Dulles Airport
- All Others

*Figures in parentheses represent the number of residential units with new building permits issued between July 1, 2024, and June 30, 2025.



Large Projects (>100 Units) Completed as of June 30, 2025

Type	Project	Units Built*
By-Right	Willowsford, The Greens	748
	Hartland South	575
	Willowsford, The Grant	490
Legislative	West Belmont Place	202
	Regency At Belmont (Belmont Executive Center)	201
	Sterling Meadow	166
	Potomac Station Marketplace	158
	Hogan Kent Green	144
	Lexington 7	136

* Unit count reflects total approved units for the entire project refined by actual subdivision. Units may have been permitted over the course of multiple years.

New Projects Approved in Fiscal Year 2025 – 1,510 Units

Project	Units
Arcola Farms Residential	307
Tillet's View	300
Fleetwood North	244
Goose Creek Village West	221
Defender Drive	161
Goose Creek Club II	90
Stone Hill	85
Crescent Sycolin	52
Oak Grove	50

Additions to Existing Projects as of June 30, 2025

– +790 Units

Project	Units
Arcola Center	524
Meadowbrook Neighborhood Center	175
Church & Market	51
Goose Creek Village North, Century Corner At	40

Summary of Remaining Unit Count – 2024-2025

	Units
Total Remaining Units (2024)	31,484
New Pipeline Project Units	+2,300
Net Adjusted Approved Units*	+59***
Other Corrections & Adjustments**	+7
Permitted Units in Pipeline Projects	-2,382
Total Remaining Units (2025)	31,468

*Increased Downey Farm and Hartland North approvals based on research on original subdivision plans. Agricultural use lots in cluster subdivisions had not been recorded as unit entitlements in past reports.

** 7 previously issued permits cancelled, and new permits issued for those units. Permits were not recorded as cancelled in earlier pipeline reports.

*** Arcola Center was previously reported with 1,113 subdivision-approved units instead of 1,169 legislatively approved units (a difference of 56). As of June 30, 2025, the Arcola Center CDP allows 524 additional units. The figures in this year's report reflect these adjustments, for a total of 1,693 legislatively approved units.

Summary of Remaining Age-Restricted Unit Count – 2024-2025

	Units
Total Remaining Units (2024)	2,429
New Pipeline Project Units	345
Net Adjusted Approved Units	0
Other Corrections & Adjustments	+2*
Permitted Units in Pipeline Projects	-199
Total Remaining Units (2025)	2,577

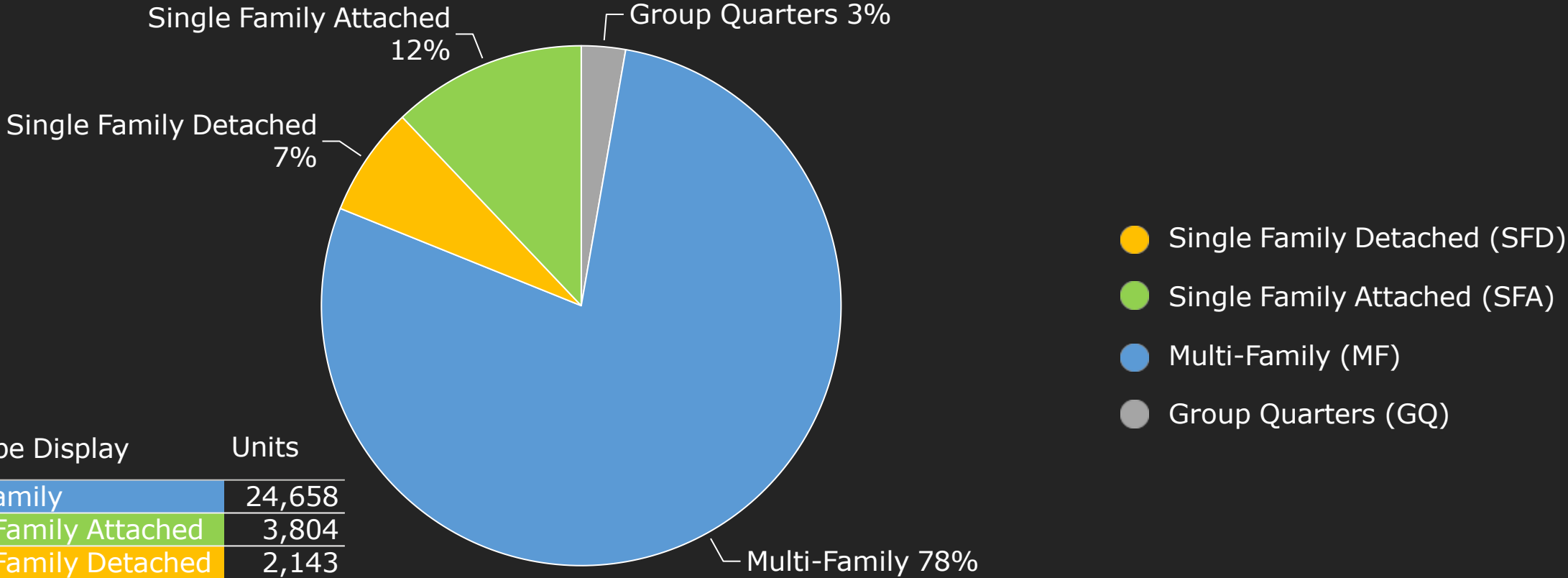
*Increased Lexington 7 approvals based on further research.

Summary of Remaining Attainable Housing Unit Count – 2024-2025

	Units
Total Remaining Units (2024)	2,994
New Pipeline Project Units	+374
Net Adjusted Approved Units	0
Other Corrections & Adjustments	0
Permitted Units in Pipeline Projects	-278
Total Remaining Units (2025)	3,090

Pipeline Analysis

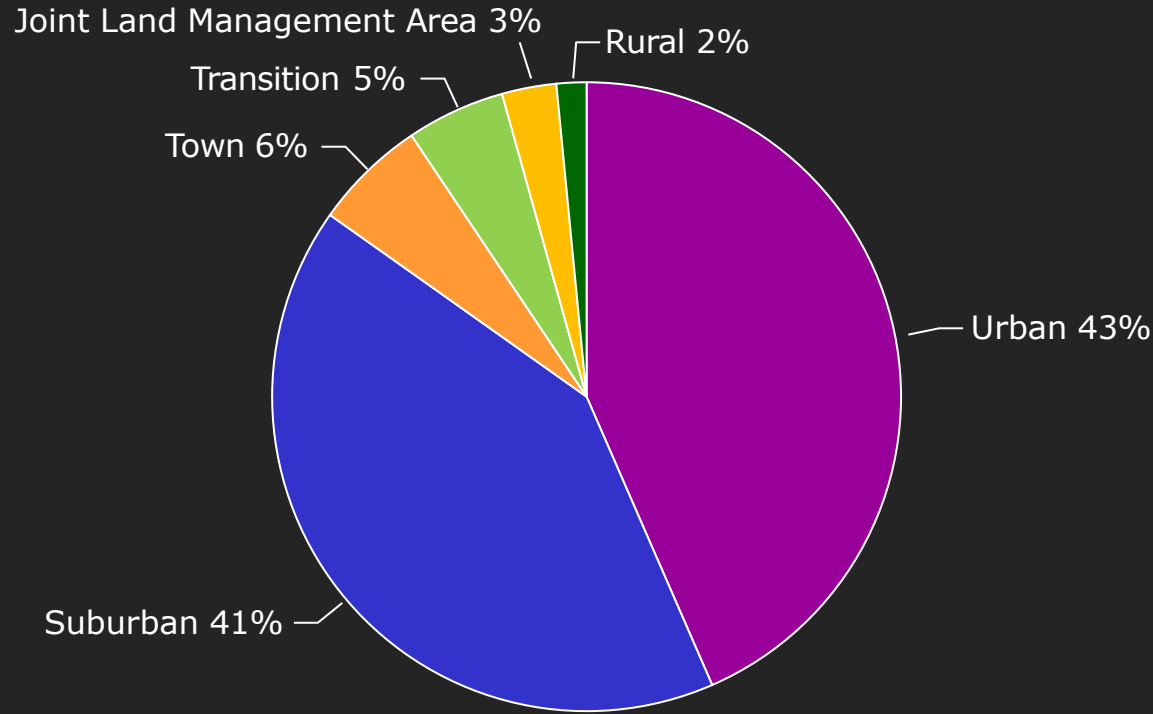
Remaining Units by Unit Type as of June 30, 2025



Unit Type Display	Units
Multi-Family	24,658
Single Family Attached	3,804
Single Family Detached	2,143
Group Quarters	863
Total	31,468

Remaining Units by Policy Area as of June 30, 2025

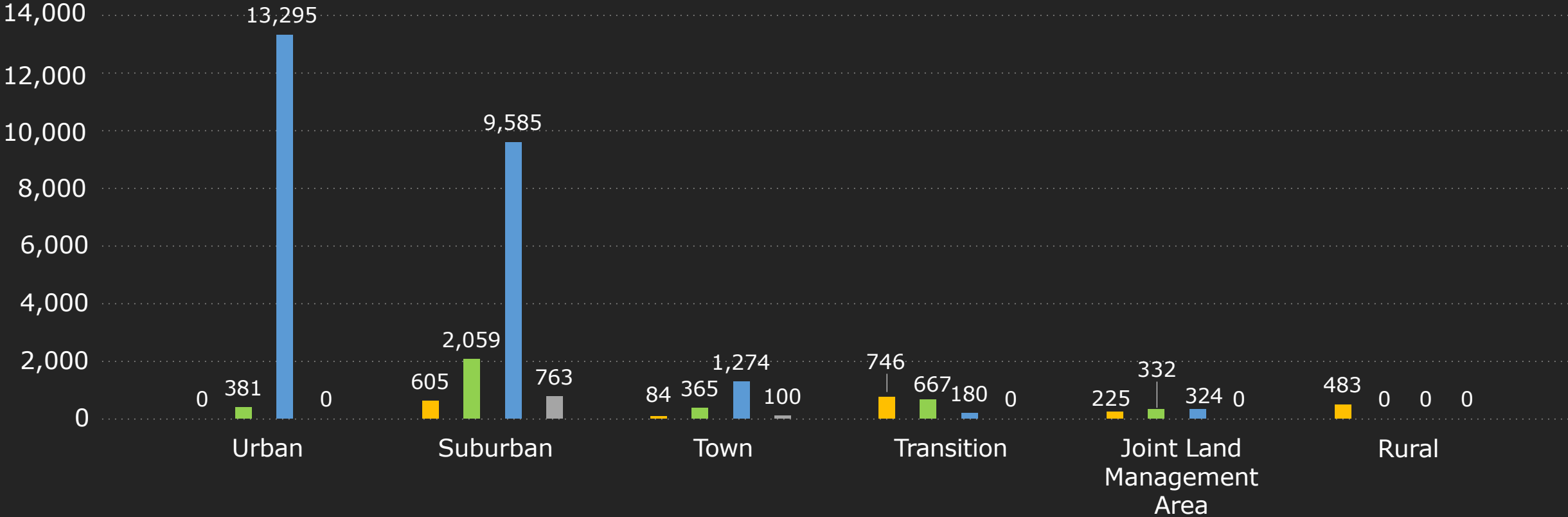
Policy Area	Units
Urban	13,676
Suburban	13,012
Town	1,823
Transition	1,593
Joint Land Management Area	881
Rural	483
Total	31,468



2019 General Plan Policy Areas – As set forth in the 2019 General Plan, the framework for land planning in Loudoun County consists of four types of policy areas—Urban, Suburban, Transition, and Rural—and several smaller planning areas designated as Joint Land Management Areas (JLMA). These areas represent distinct planning communities with specific policies, strategies, and actions tailored to address the vision for each area’s future land uses, growth management, and built environment.

Remaining Unit Types by Policy Area as of June 30, 2025

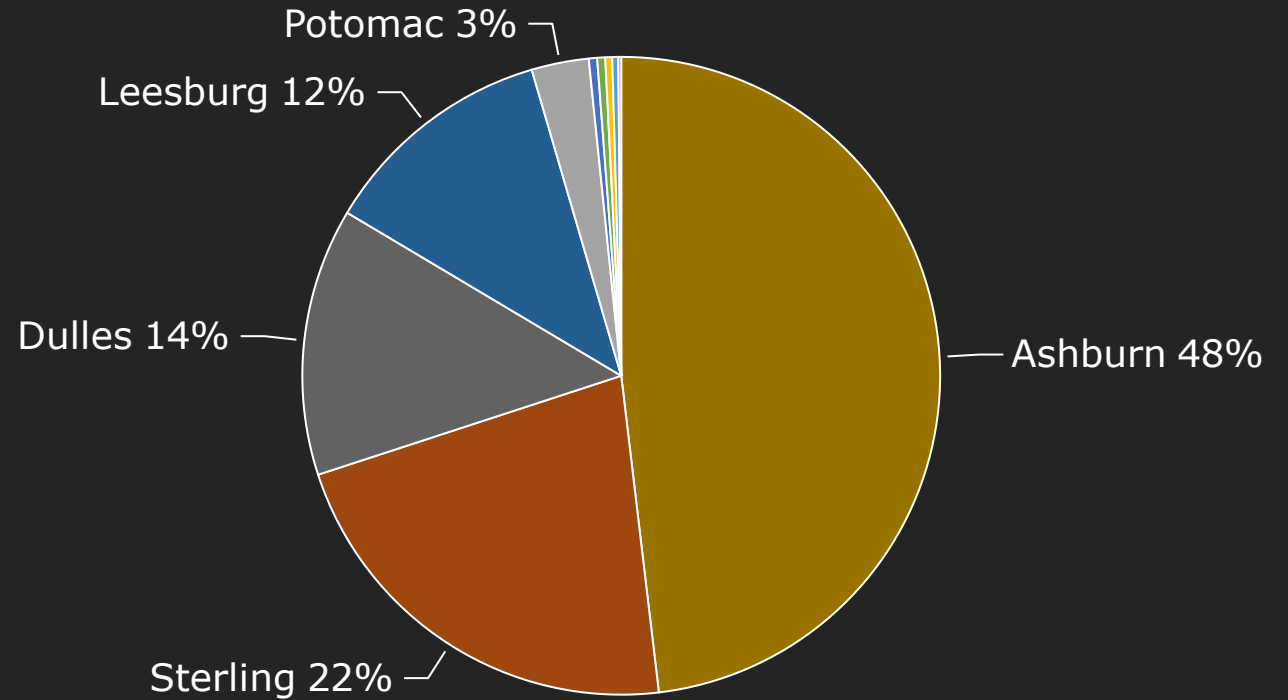
● SFD ● SFA ● MF ● GQ



Remaining Units by Fiscal Planning Subarea as of June 30, 2025

Fiscal Planning Subarea Remaining Units

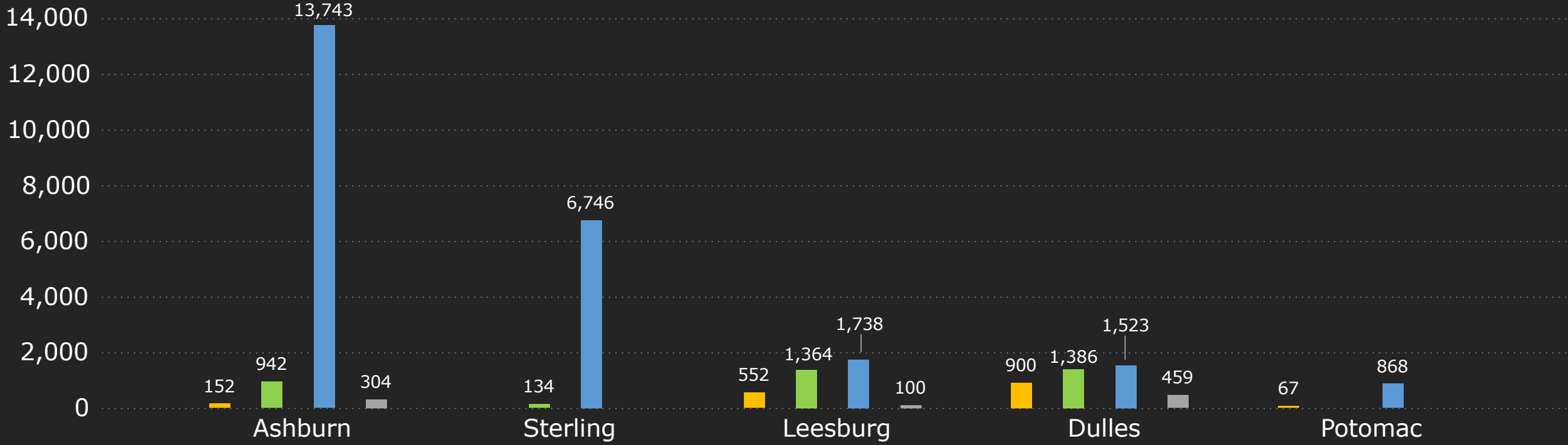
Ashburn	15,141
Sterling	6,880
Dulles	4,268
Leesburg	3,754
Potomac	913
Northwest	133
Rt. 7 West	127
Southwest	110
Rt. 15 South	96
Rt. 15 North	46
Total	31,468



Fiscal Planning Subareas – The Capital Needs Assessment (CNA) divides the County into ten planning subareas, which may be thought of as service delivery areas. The CNA uses the County’s forecasted population growth and adopted Capital Facilities Standards (CFS) to identify the type and quantity of facilities needed in each subarea. The population within each subarea drives the demand for facilities. In this way the County can identify more accurately where the demand is greatest and plan accordingly.

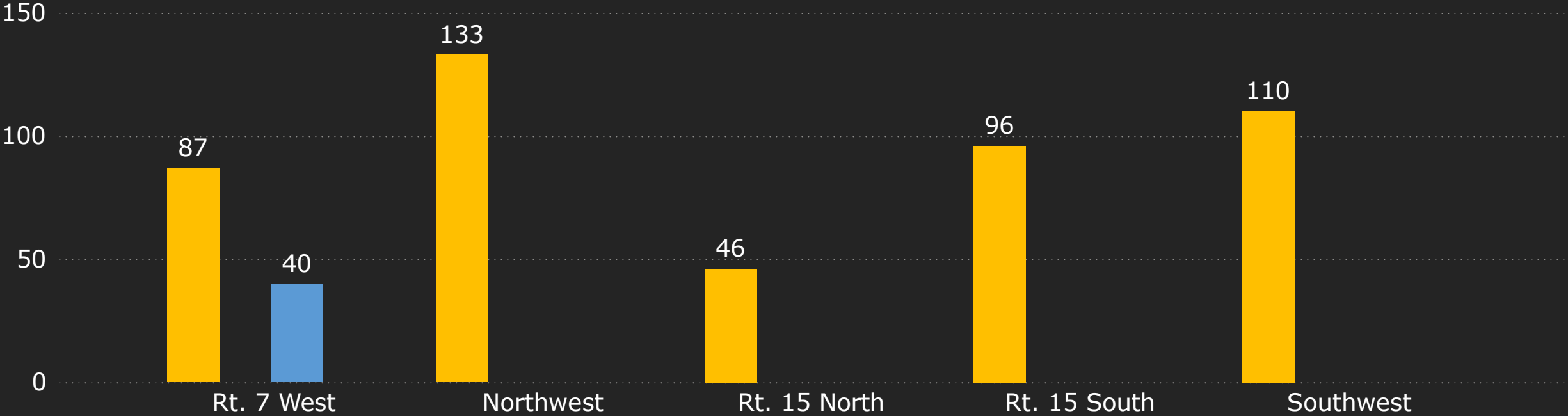
Remaining Unit Types by Fiscal Planning Subarea as of June 30, 2025 (Eastern Loudoun Only)

● SFD ● SFA ● MF ● GQ

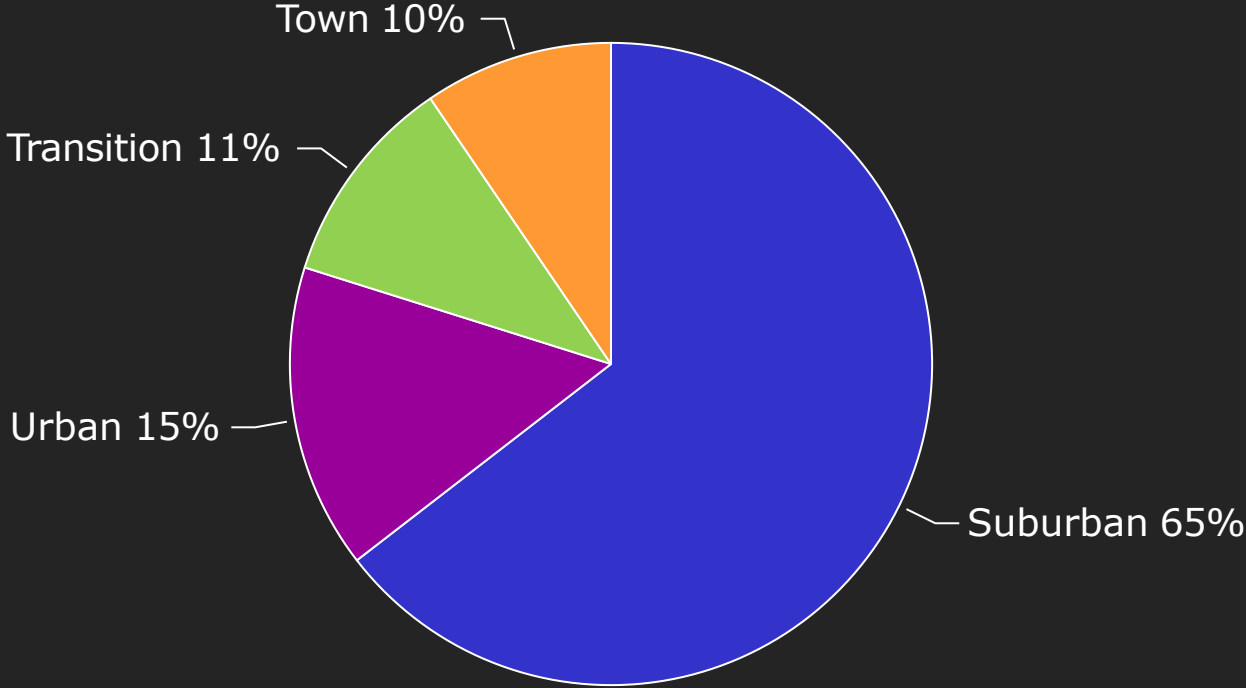


Remaining Unit Types by Fiscal Planning Subarea as of June 30, 2025 (Western Loudoun Only)

● SFD ● SFA ● MF ● GQ

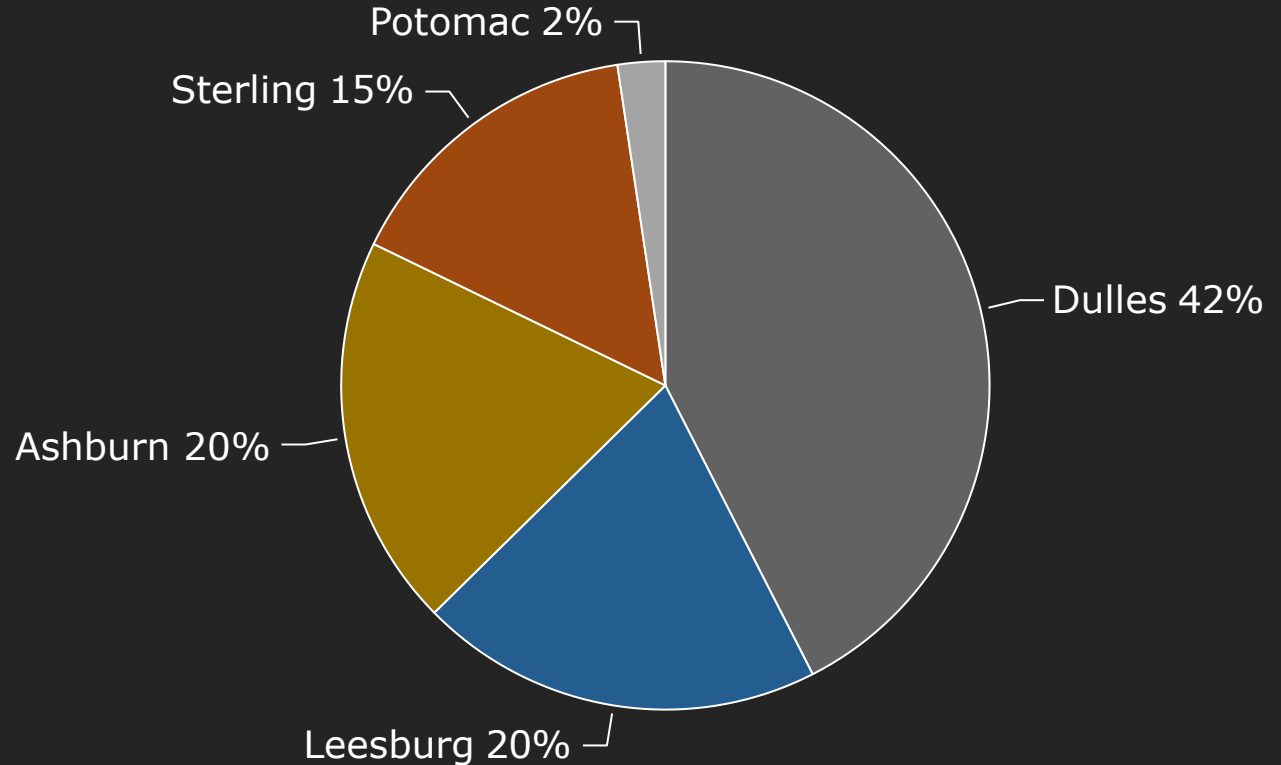


Remaining Age-Restricted Units by Policy Area as of June 30, 2025



Policy Area	Total Remaining Units
Suburban	1,663
Urban	395
Transition	274
Town	245
Total	2,577

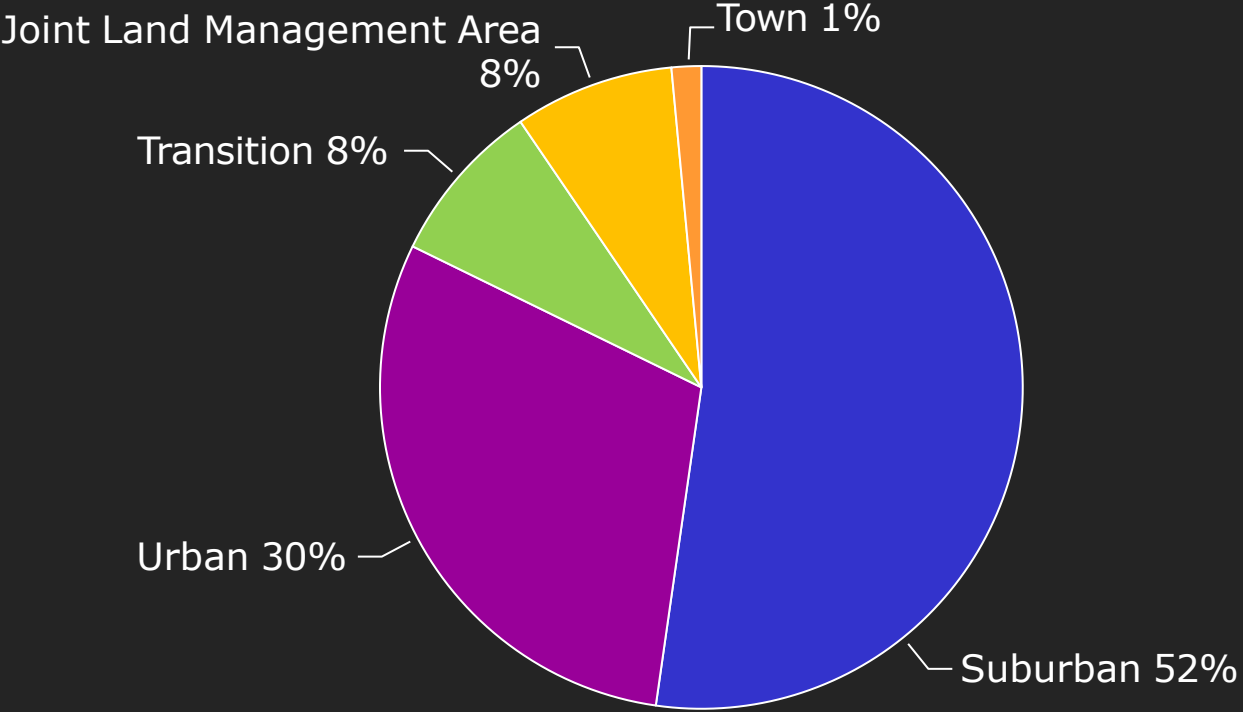
Remaining Age-Restricted Units by Fiscal Planning Subarea as of June 30, 2025



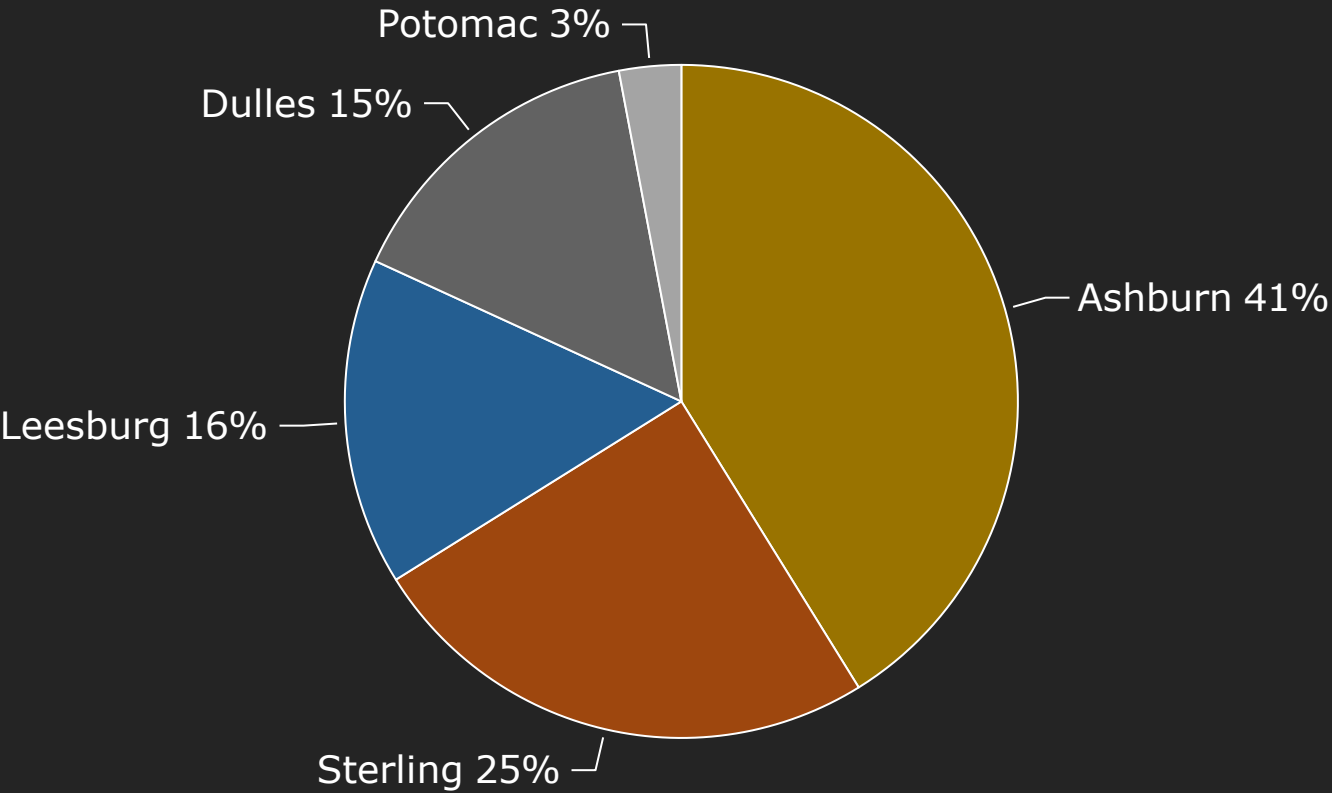
Fiscal Planning Subarea	Remaining Units
Dulles	1,095
Leesburg	519
Ashburn	504
Sterling	398
Potomac	61
Total	2,577

Remaining Attainable Dwelling Units by Policy Area as of June 30, 2025

Policy Area	Remaining Units
Suburban	1,615
Urban	926
Transition	255
Joint Land Management Area	248
Town	46
Total	3,090



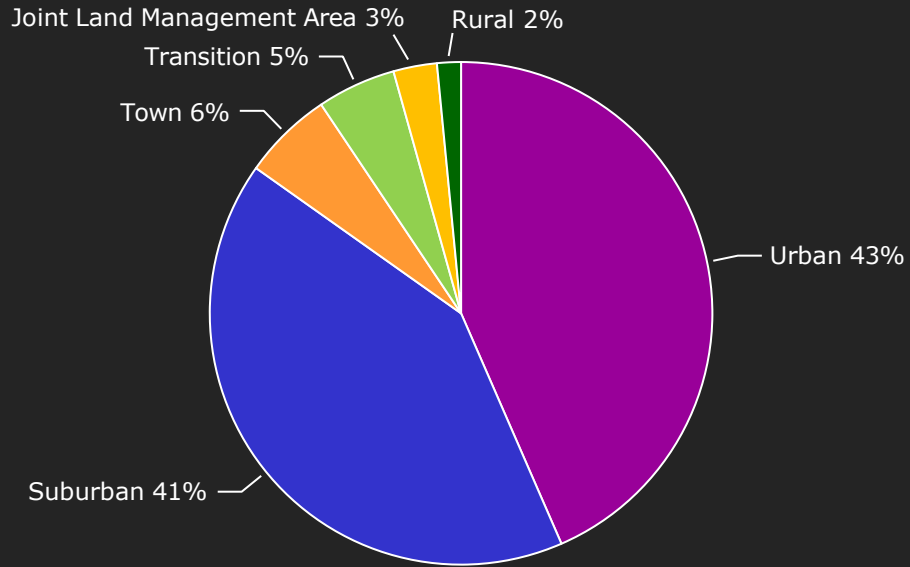
Remaining Attainable Dwelling Units by Fiscal Planning Subarea as of June 30, 2025



Planning Sub Area	Remaining Units
Ashburn	1,272
Sterling	771
Leesburg	486
Dulles	469
Potomac	92
Total	3,090

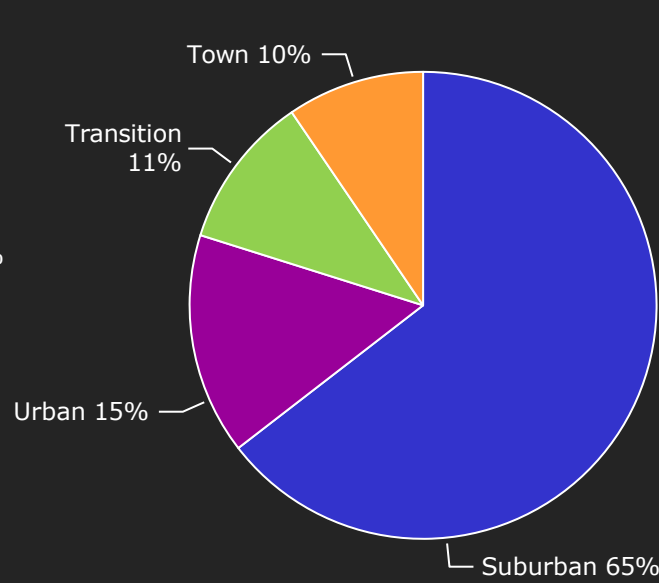
2025 Residential Pipeline: Remaining Units by General Plan Policy Area

Total Units by Policy Area



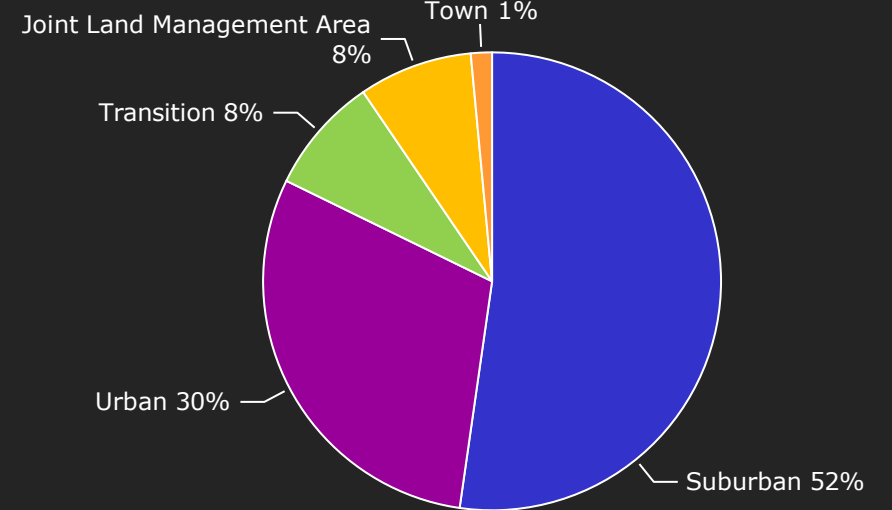
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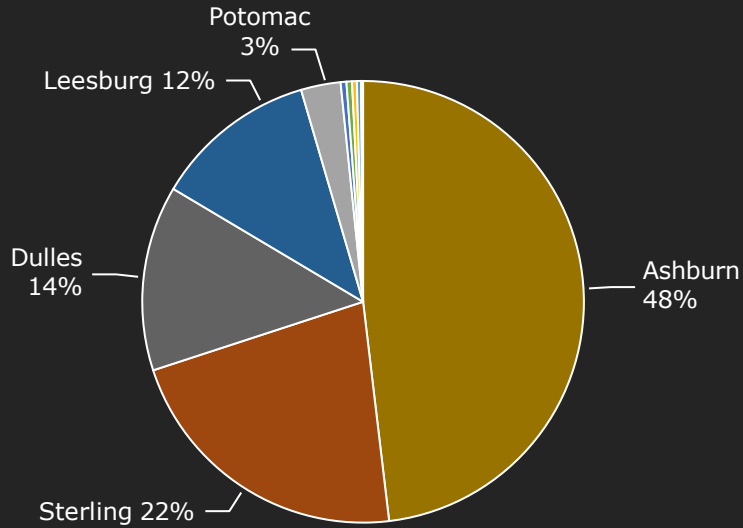
Attainable Dwelling Units



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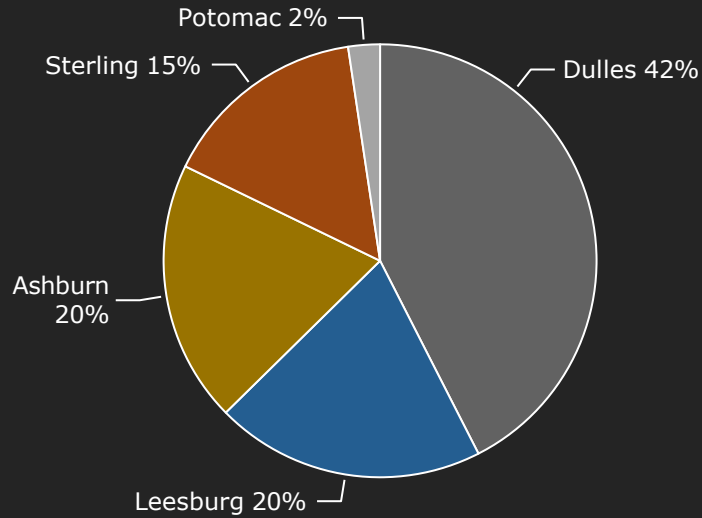
2025 Residential Pipeline: Remaining Units by Fiscal Planning Subarea

Total Units



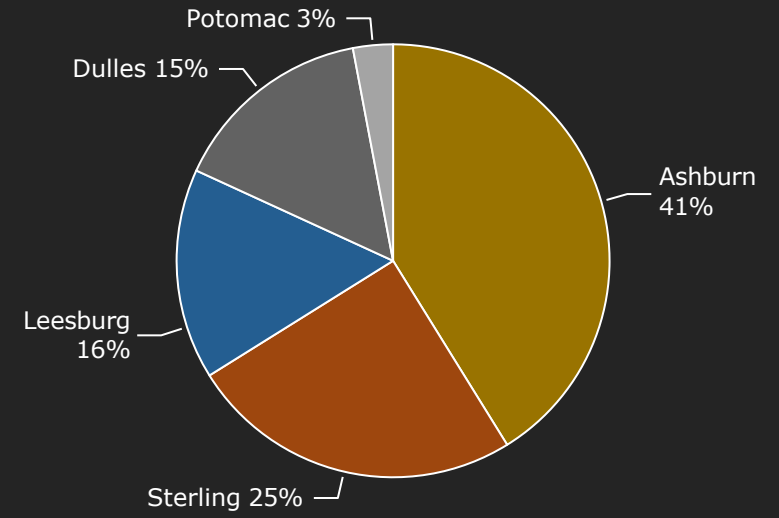
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Age-Restricted



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Attainable Dwelling Units



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Loudoun County Residential Pipeline Projects FY2025

Countywide; All Remaining Residential Units (31,468 Total)

