



HOUSING MARKET ANALYSIS

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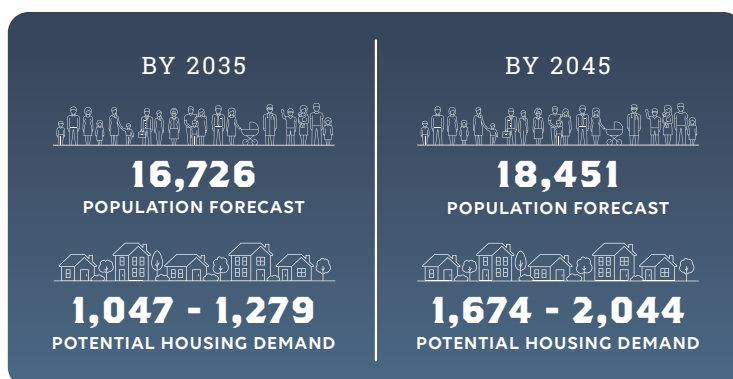
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HOUSING MARKET ANALYSIS

CROCKETT COUNTY, TN

EXECUTIVE SUMMARY

The West TN Planning Forecast for Population for Crockett County projects that the county population will reach 16,726 by 2035 and 18,451 by 2045. This translates into potential demand for 1,047 to 1,279 housing units by 2035, and between 1,674 to 2,044 units by 2045.



The range of projected housing unit demand is derived from the average number of people per household. Currently, Crockett County has an average household size of 2.44 persons per household, which is comparable to the rest of the BlueOval City (BOC) impact zone. As BOC and other new economic growth attract more working-age families with children, it is projected that the average household size in Crockett County will increase.

There is low availability in Crockett County's current housing market, with very few houses listed for sale, and the limited number of existing multi-family units are at full occupancy. This means a majority of the forecasted housing demand will need to be met with new construction.

The number of housing starts and housing sales in Crockett County has been low over recent years; this is a reflection of the historic population decline in Crockett County prior to the announcement of BOC, as well as national housing market trends.

Many Crockett County residents are currently commuting to jobs in surrounding counties, indicating a lack of employment locally. With its proximity to BOC and a Tennessee Certified Site, Crockett County is poised to attract tier 2 and 3 suppliers as well as other employers, creating more jobs in the local economy. This anticipated growth is factored into the housing demand forecast.

A mathematical analysis illustrated in this report finds that there is capacity to develop approximately 2,221 housing units within the county's municipalities – Alamo, Bells, Friendship, Gadsden, and Maury City. This analysis was based on existing land use and residential patterns in the municipalities and the county. Maps illustrating this potential capacity are included in this report.

THIS ANALYSIS FINDS THAT THERE IS SUFFICIENT DEVELOPABLE LAND TO MEET THE FORECASTED HOUSING DEMAND.

It is recommended that, as much as possible, development be focused within town limits first, and then within the UGBs in locations with water, sewer and other utility service. In the public listening sessions for West TN Planning, city officials noted a desire by developers be annexed into city limits, but were limited by water and wastewater services..

Creating more density within town limits may help lower the immediate need for new public infrastructure and increase the speed of residential development to meet the rising demand for housing. Concentrating development also preserves agricultural land, desirable natural areas, and environmentally sensitive areas.

Additional housing density can be accomplished without detrimental effects on the character of the communities. Development and redevelopment of areas of substandard housing and blighted commercial areas can improve existing housing values.

There are no large-scale (150+ units) market-rate apartment complexes in Crockett County. Of the 1,674 to 2,044 forecasted housing unit demand, 491 to 600 units could be met with multi-unit apartment complexes. Zoning and building standards would be needed to guide development of high-quality, multi-family housing with modern amenities. If these housing needs are not addressed through well-planned apartment complexes, the county risks attracting alternative forms of affordable housing, namely RV parks and mobile home communities, which often come with fewer aesthetic controls.

The average income of households in Crockett County will support a range of home values and rents. Homes ranging in price from \$120,393 to \$490,048 will be needed to match the household incomes in the county. Rental rates ranging from \$1,124 per month to \$3,165 per month can be supported by the range of household incomes.



\$120,393 - \$490,048

AFFORDABLE HOUSING VALUE RANGE



\$1,124 - \$3,165

AFFORDABLE MONTHLY RENT RANGE

Currently, a total of 42 single-family units makes up the residential housing projects that have reached the approved/construction stage. It is difficult to estimate how many units from the pipeline of projects currently under consideration will reach the approval and construction stage. A county-wide coordinated approach to attract new developments and track them to fruition could be beneficial in meeting the projected housing demand.

There are a number of constraints to reaching the full potential for housing development in Crockett County. Land for development is not readily available. The Crockett County economy has a large agricultural sector and much of the land is devoted to farming.

Additionally, development will require substantial investments in both utility and public service infrastructure. While Crockett County schools are attractive to people looking to relocate, schools are reported to be at maximum capacity and have had to turn away potential out-of-county students.

The county is not currently equipped to provide water or wastewater to expected commercial growth along US Highway 412 or areas that have been identified as potential locations for residential development. Road capacity improvements may also be needed in some areas to accommodate the increased population and commercial traffic.

Housing demand in Crockett County is projected to be much higher than over the past 20 years. However, despite land and other constraints, Crockett County has grown at the forecasted rate in prior decades with over 1,000 new units constructed in the 1970s and 1990s. Development recommendations in this report note ways for Crockett County communities to meet the forecasted housing demand.

STUDY BACKGROUND

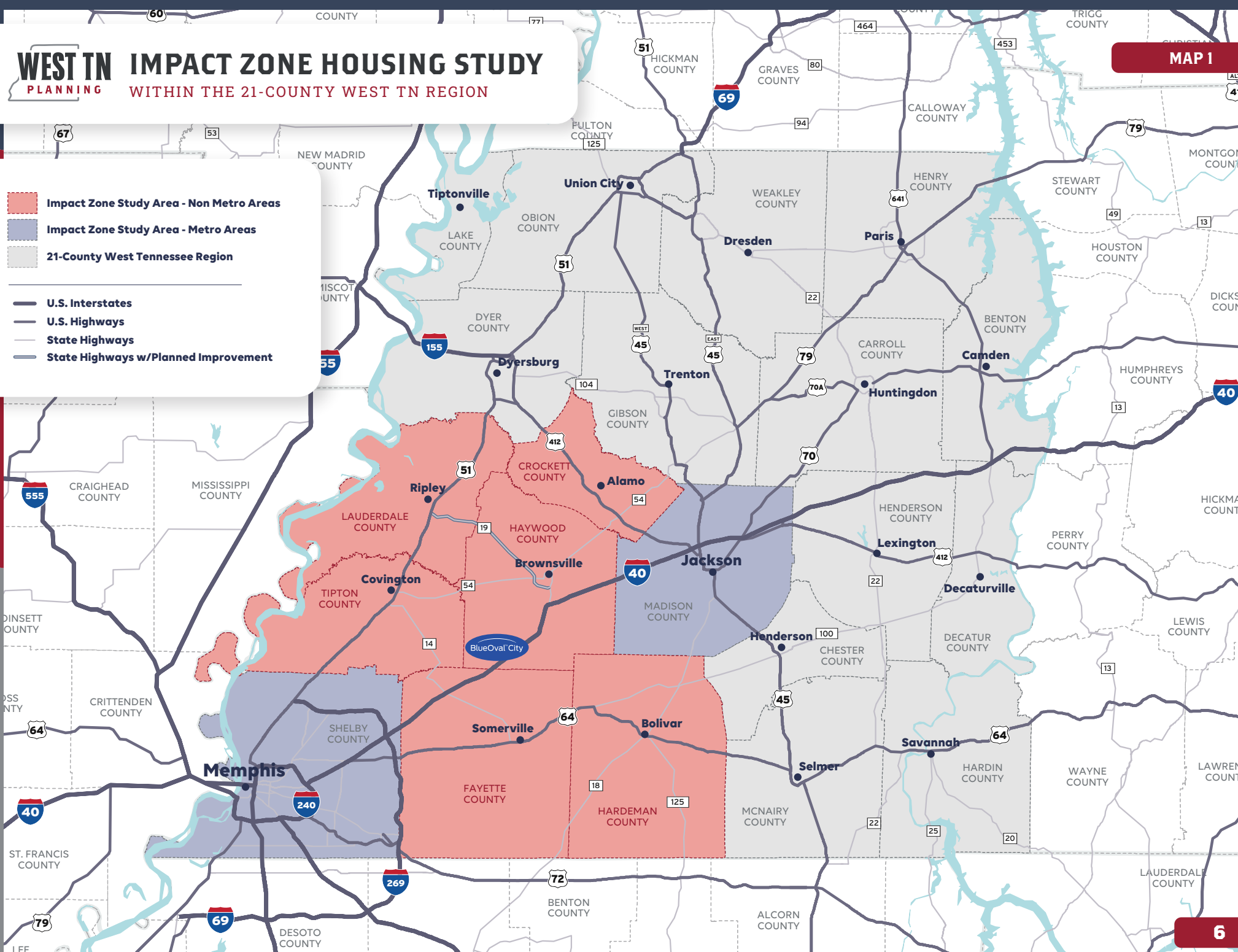
In late 2021, Governor Bill Lee announced that Ford Motor Company and SK Innovation selected the 3,600 acre Megasite in Haywood County for a vehicle assembly and battery manufacturing campus. This Ford Motor Company campus, known as BlueOval City (BOC), is expected to spur additional industrial, commercial, and residential development throughout West Tennessee.

As a result, many of the predominantly rural communities in the region face unprecedented growth and development. In response to this, Tennessee Department of Economic and Community Development (TNECD) is overseeing a five-year West Tennessee Planning effort to assist these communities as they prepare for the anticipated growth catalyzed by BlueOval City. The West TN Planning team is working with state, regional, and local agencies to understand the regional impact of all aspects of community development.

TNECD has identified eight significant impact counties within a 60-minute drive of BOC that will see the most immediate changes in the next ten years. This region, which includes Crockett County, will be referenced as the “Impact Zone” in this report. Map 1 on the next page depicts the 21-county West Tennessee Region and the Impact Zone.

West TN Planning has identified the need for a housing study specific to each of the 21 counties in the region to provide consistent baseline data, identify specific housing demand, and signal opportunity for investment. Eighteen housing market studies will be completed as part of this effort. A housing analysis was released in 2022 for Jackson-Madison County; Shelby County has recent and ongoing housing studies conducted by various groups; and Dyer County’s housing market analysis, funded by the ThreeStar program, will be released this year. A regional housing overview will also be compiled for the Impact Zone, which will include findings from Lauderdale, Crockett, Tipton, Fayette, and Hardeman Counties as well as findings from Madison County (Jackson metro) and Shelby County (Memphis metro).

This report examines the potential demand for housing in Crockett County projected to be generated by BOC, and compares that demand to the existing housing market and to the capacity for new housing development based on general land use. Crockett County includes the incorporated towns of Alamo, which is the county seat, Bells, Friendship, Gadsden and Maury City.



POPULATION PROJECTIONS

TNECD's West TN Planning effort produced the *West TN Regional Assessment Forecasts for Population* in September 2023. That report anticipates a West Tennessee population increase of more than 109,500 individuals by 2035 and more than 176,300 by 2045.

Crockett County has previously experienced many years of population loss. Prior to the announcement of BOC, the county population was projected to continue to decline through 2070. This means there has been a low demand for new housing construction in the county.

BOC and the multiplier effect it will create is expected to dramatically change these population trends and create unprecedented housing demand in West Tennessee, including Crockett County. At full production in 2027, Ford and SK have announced they plan to directly employ 5,760 workers. Economic impact analyses show that 19,621 total jobs will be created in West TN as a result of BOC operations.

Population growth was allocated to each county based on an algorithm of factors that influence where people choose to live.

The factors that favor Crockett County as a residential location are commute time to BOC, a higher rating of schools than some neighboring counties, and its potential for attracting other economic development projects. Crockett County's proximity and highway connectivity to the BlueOval campus makes it a desirable location for workers locating to the region for employment.

The *West TN Planning Forecasts for Population* for Crockett County has projected potential growth of more than 4,500 people from 2022 to 2045 as shown below.

TABLE 1 | POPULATION PROJECTIONS

County	2022 Estimate from Census Bureau	2025 Projection	2030 Projection	2035 Projection	2040 Projection	2045 Projection	Cumulative Change 2022-2045
Crockett	13,888	14,784	15,857	16,726	17,560	18,451	4,563

*Data Compiled: August 2023 – Based on BOC Operations and related or “downstream” growth
Source: “West TN Regional Assessment Forecasts for Population,” Younger Associates*

The algorithm recognized the positive potential of the county's certified industrial site. This fully prepared site provides an advantage for attracting BOC suppliers and other industrial growth that is likely to be spurred in the region. Crockett County has purchased an additional 45 acres already served by water and natural gas.

Negative factors in the population growth algorithm include a deficit of quality-of-life amenities such as retail, entertainment and personal services throughout the county. However, retail and personal services can follow population and housing growth, particularly if commercial development and public recreation are planned in conjunction with residential development.

Comments by participants in the West TN Planning listening sessions noted that existing public services in the county appear overextended. Crockett County relies on volunteer fire departments and has no full-time firefighters.

There is no hospital in the county; instead, EMS serves as a mobile hospital with a fleet of fully equipped ambulances. However, Crockett County is a short distance from hospitals in neighboring counties, particularly a West Tennessee Healthcare hospital in north Jackson.

Crockett County schools, rated average to above-average by the Tennessee Department of Education, have attracted more than 100 out-of-county student applications in recent years. Last year the school system completed an \$18 million expansion. Families living in the county have expressed satisfaction with Crockett County schools. It should be noted that Alamo has it's own special school district.

Crockett County is largely an agricultural economy, and productive farmland is not available to be converted to residential development. There are opportunities for development along U.S. Hwy 412, which traverses the county. However, water capacity is limited to certain areas and wastewater service is not currently available. Large investments in water and wastewater infrastructure will be necessary to develop this corridor.

The population forecast algorithm is summarized on page 9.

TABLE 2 | POPULATION GROWTH ALGORITHM SUMMARY – 2022-2035

Scoring Matrix	Criteria	Crockett Matrix Score
LOCATION Scale of 0-3 Score = 3x Rating	0 = 60+ minutes from site 1 = 35-59 minutes from site 2 = 21-34 minutes from site 3 = 20 minutes or less from site	3.0
PROPENSITY TO ATTRACT BOC SUPPLIERS	One Point for Each Certified Site	1.0
ANNOUNCED JOBS (excluding BOC) Scale 0-5	2021 - June 2023 0 = 0-99 1 = 100-299 2 = 300-599 3 = 600-999 4 = 1000-2000 5 = 2000+	0.0
AVAILABLE HOUSING Scale of 1 - 3	Based on: Number of homes listed on the market as of July 2023; Number of apartment units listed online as of July 2023; Building permits 2020 - June 2023; and Potential for multi-family development (years 35-45)	0.0
QUALITY OF SCHOOLS Scale 0-5	Based on: Average ACT, Percentage of Graduates moving to Post Secondary Education, Proficiency Rates for Math and Science for 3rd and 5th Grades	2.5
AMENITIES Scale -1 to 4	Retail Inleakage, Outleakage, and Unmet Demand for Potential Growth	-1.0
Scale 0-2	Primary Campus of Four-Year University	0.0
Scale 0-1	Developable Waterfront Property	0.0
POPULATION TRENDS State Projected Growth Trend Scale -2 to +3	-2 = Greater than -4 -1 = -.4 to -.2 0 = -.2 to 0 1 = 0 to 1 2 = 1 to 2 3 = Greater than 2	-1.0
MSA Yes = 1	Meets MSA Designation Criteria	
Total		4.5

Data Compiled: August 2023

Source: "West TN Regional Assessment Forecasts for Population," Younger Associates (Full algorithm for all West Tennessee Counties are found in the "West TN Regional Assessment Forecasts for Population")

EMPLOYMENT & COMMUTE PATTERNS

Crockett County has an existing base of major employers that will continue to attract workers and contribute to demand for housing. The largest industrial employers in Crockett County are listed below by number of employees.

CROCKETT COUNTY TOP INDUSTRIAL/DISTRIBUTION EMPLOYERS

- | | |
|---|--|
| 1. The Pictsweet Co. – 500 | 5. Alfresco Pasta – 23 |
| 2. Hitachi Energy – 160 | 6. Yukon Outfitters – 20 |
| 3. Direct Customer Solutions (DCS) – 89 | 7. Southern Pride Distributing, LLC – 16 |
| 4. Advantage Manufacturing Corp. – 30 | 8. Moore Pumps, Inc. – 14 |

The table below lists the single industrial announcement in Crockett County between January 2021 and August 2024.

TABLE 3 | NEW ECONOMIC DEVELOPMENT ANNOUNCEMENTS – 2021 TO AUGUST 2024

Landed Date	Year	Company	New Jobs	Capital Investment	Project Type	City	County
3/1/22	2022	Alfresco Pasta, LLC	35	\$3,859,341	Expansion New Location	Bells	Crockett

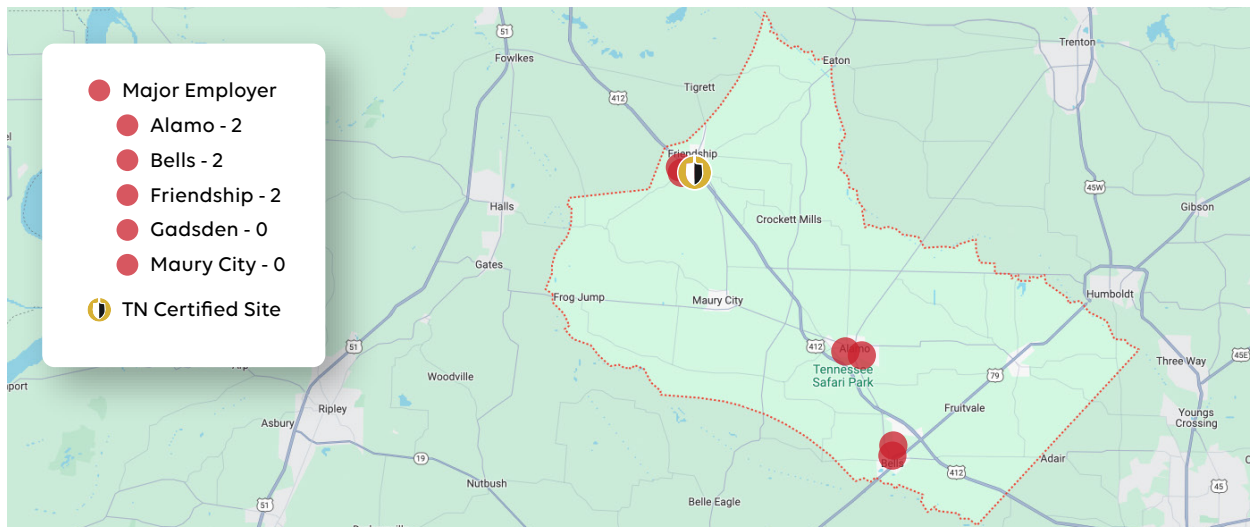
Sources: TN Dept of Economic & Community Development, Younger Associates

Map 2 on the next page shows recent economic development projects announced in West Tennessee and the location of the certified industrial site available for additional projects.

Crockett County contains a 43-acre Tennessee Certified Site in a highly advantageous location, adjacent to US Highway 412 and within an hour's drive of BOC. This makes it an attractive choice for auto part suppliers and distribution companies.

Crockett County has purchased a 45-acre site located on Hwy 412 outside of Friendship, but it has not been certified as fully development-ready. Additionally, Crockett County is near a certified site in northern Lauderdale County.

GRAPHIC 1 | CROCKETT COUNTY MAJOR EMPLOYERS & CERTIFIED SITES



- 21-County West Tennessee Region
- Announced in 2021
- Announced in 2022
- Announced in 2023
- Announced in 2024
- TN Certified Sites
- U.S. Interstates
- U.S. Highways
- State Highways
- State Highways w/Planned Improvement

21-County West TN Region Total

Jobs: 13,256
Investment: \$8.0 Bil

Benton County
Jobs: 70 • Investment: 12.3 Mil

Carroll County
Jobs: 588 • Investment: \$34.7 Mil

Chester County
Jobs: 30 • Investment: \$5.0 Mil

Crockett County
Jobs: 35 • Investment: \$3.9 Mil

Fayette County
Jobs: 611 • Investment: \$208.1 Mil

Gibson County
Jobs: 318 • Investment: \$56.6 Mil

Hardeman County
Jobs: 172 • Investment: \$14.4 Mil

Hardin County
Jobs: 20 • Investment: \$1.0 Mil

Haywood County
Jobs: 7,073 • Investment: \$6.4 Bil

Henderson County
Jobs: 155 • Investment: \$16.1 Mil

Henry County
Jobs: 163 • Investment: \$11.4 Mil

Lake County
Jobs: 140 • Investment: \$150.0 Mil

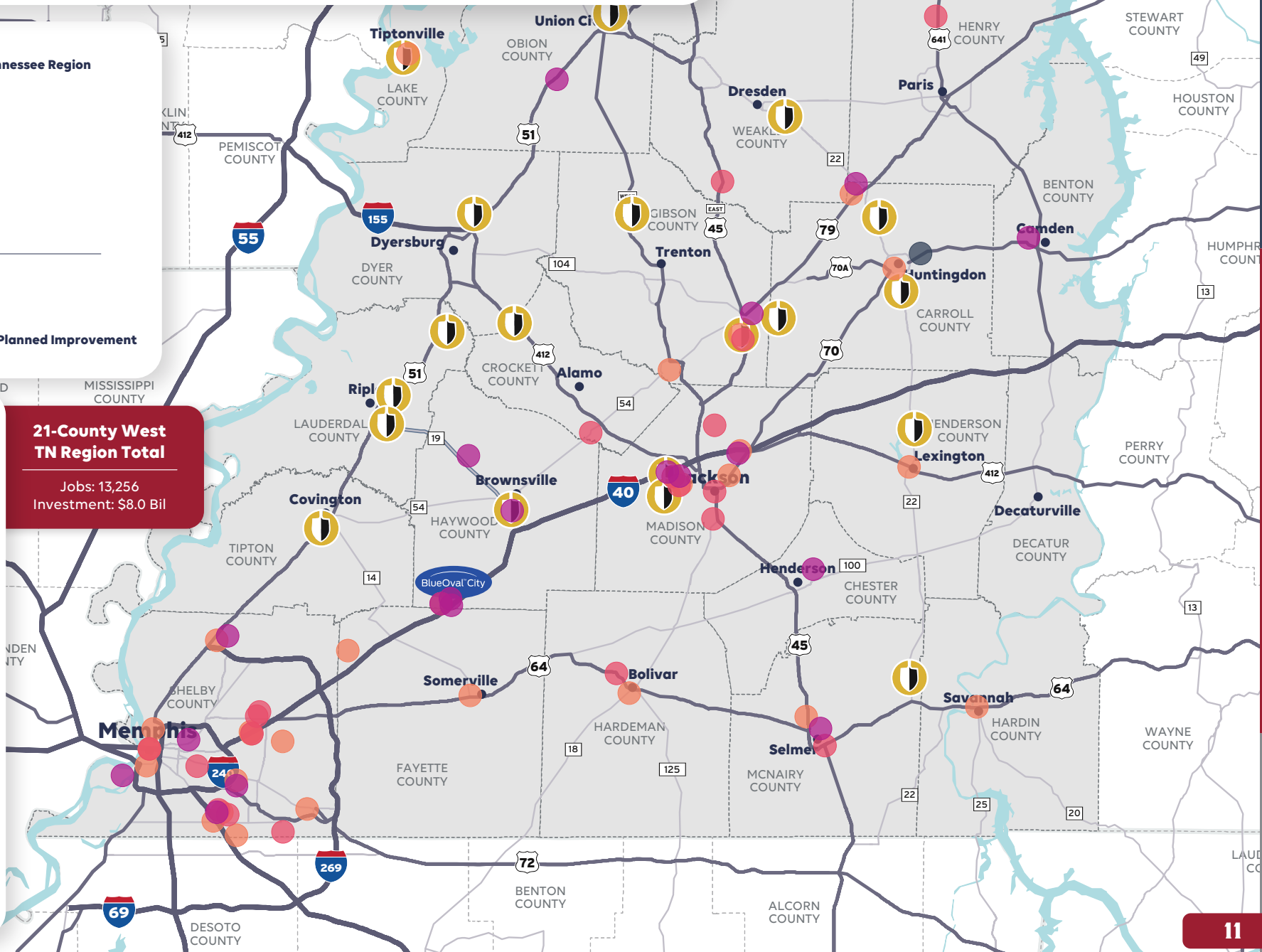
Madison County
Jobs: 991 • Investment: \$779.9 Mil

McNairy County
Jobs: 187 • Investment: \$35.6 Mil

Obion County
Jobs: 20 • Investment: \$1.4 Mil

Shelby County
Jobs: 2,647 • Investment: \$324.3 Mil

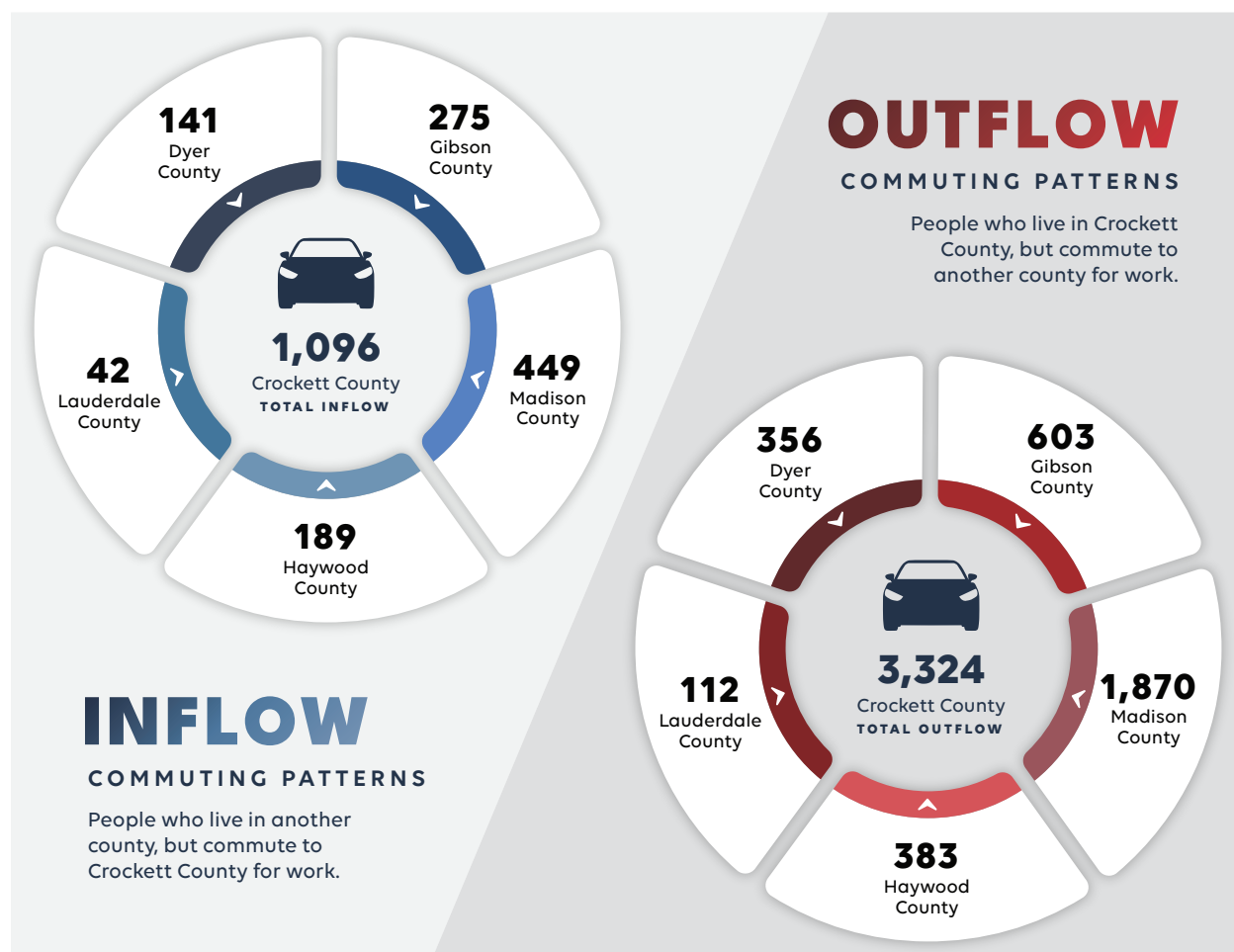
Weakley County
Jobs: 36 • Investment: \$2.2 Mil



The *West TN Planning Regional Assessment Forecasts for Employment* analyzes the types of support industries and jobs that will be created to bolster the economic growth generated by BOC. This report was produced by TNECD's West TN Planning effort in October 2023. It provides information on jobs by occupation type as well as regional and national wage rates.

Graphic 2 displays the commute patterns among workers in the contiguous and nearby counties with the highest commuting activity into and out of Crockett County. Historically, a significant proportion of workers living in Crockett County have commuted to other counties, particularly Madison County, where there is a higher density of jobs and more diversity of available occupations.

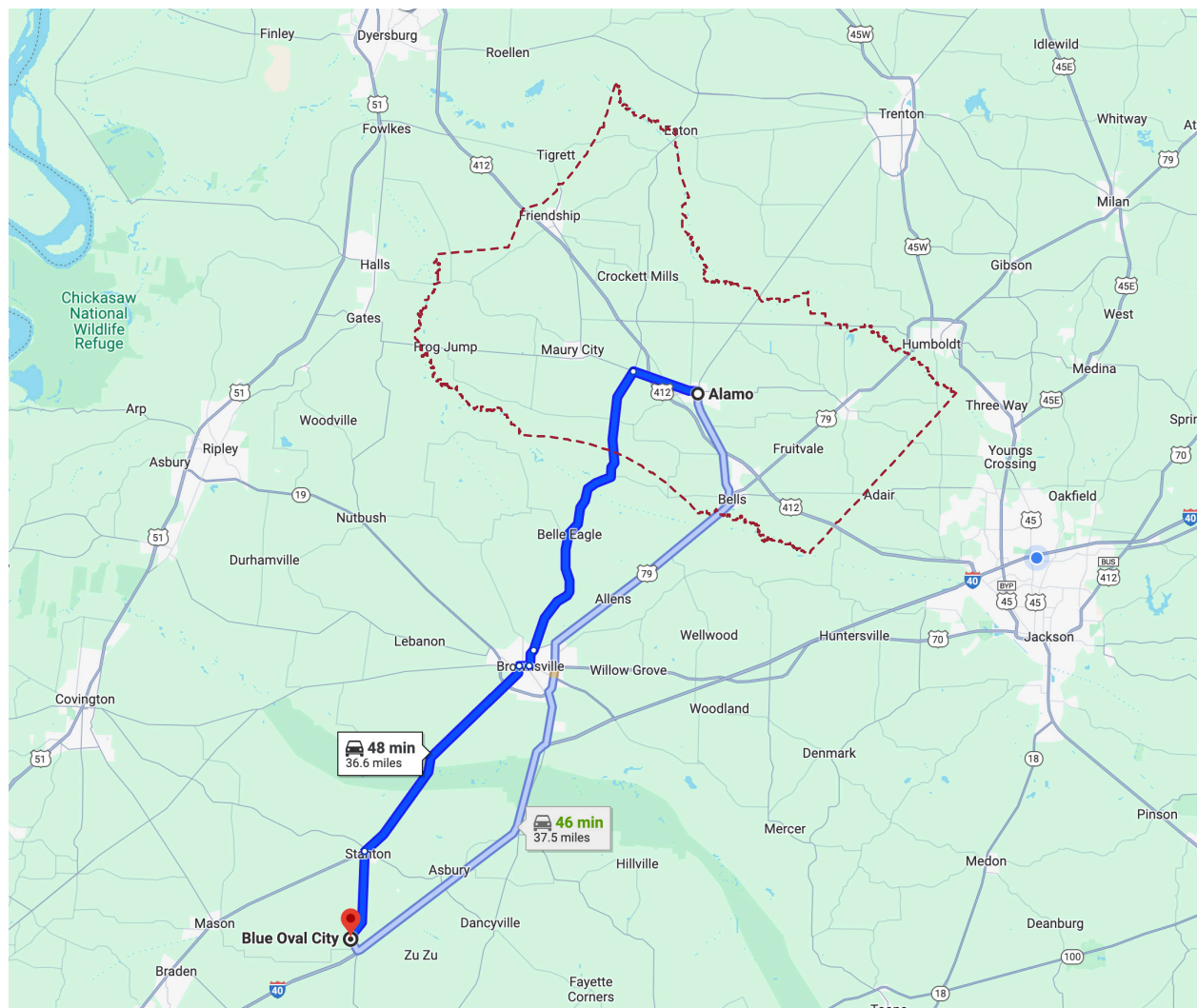
GRAPHIC 2 | COMMUTE PATTERNS



Source: U.S. Census Bureau: County to County Commuting Flows- ACS 2016-2020, Younger Associates

Approximately 2,465 people live and work in Crockett County, while an estimated 3,324 workers travel outside the county for employment. Among the counties depicted, approximately 1,096 people in-commute to Crockett County for work, meaning that an estimated net total of 2,228 people currently leave the county to commute to their jobs.

GRAPHIC 3 | COMMUTE FROM ALAMO TO BLUEOVAL CITY



In the early years of BOC operations, it is expected that a large number of workers will in-commute to the campus from other counties, where housing is more readily available. Later, as more housing is constructed nearer the BlueOval campus, workers will choose to locate closer to their place of work.

Alamo is located approximately 45 minutes from BOC, while Bells is just over 30 minutes.

- » Alamo – 46 minutes (37.5 Miles)
- » Bells – 35 minutes (32 Miles)
- » Friendship – 53 minutes (42.6 Miles)
- » Gadsden – 45 minutes (39.2 Miles)
- » Maury City – 48 minutes (36.8 Miles)

PROJECTED HOUSING DEMAND

Population growth projections can be translated into housing demand based on average household size. Projections can be further estimated in regard to single-family households and multi-family households based on historical, local, and regional patterns.

Based on these factors, it is projected that demand for housing in Crockett County in 2035 will range from 1,047 to 1,279 units. Tables 4A-4C show unconstrained housing demand projections for Crockett County. These projections are driven by population only and are not constrained by factors such as infrastructure capacity and land available for development.

TABLE 4A | HOUSING DEMAND PROJECTIONS – 2035

Projected Housing Demand by 2035		
2035 Projected Population Growth ¹	2,838	
Average Number Per Household Unit ²	2.44	
Percent of Owner-Occupied Housing Units ³	70.72%	
Percent of Renter-Occupied Housing Units ³	29.28%	
	Low Range	High Range
Projected Total Housing Units	1,047	1,279
Projected New Owner-Occupied Housing Units	740	904
Projected New Renter-Occupied Housing Units	307	375

1. Data from the "West TN Regional Assessment Forecasts for Population" report.

2. 2024 Claritas Environics estimate based on 2020 Census data.

3. The percentage of Owner- and Renter-Occupied housing units were adjusted to reflect the state average for counties with high concentrations of Section 8 and government housing units.

TABLE 4B | HOUSING DEMAND PROJECTIONS – 2035-2045

Projected Housing Demand 2035-2045		
2035-2045 Projected Population Growth ¹	1,725	
2045 Projected Number Per Household Unit ²	2.48	
Percent of Owner-Occupied Housing Units ³	70.72%	
Percent of Renter-Occupied Housing Units ³	29.28%	
	Low Range	High Range
Projected Total Housing Units	627	765
Projected New Owner-Occupied Housing Units	443	541
Projected New Renter-Occupied Housing Units	184	224

1. Data from the "West TN Regional Assessment Forecasts for Population" report.

2. Assumes a 15% increase in the number of persons per household based on 2020 Census data from 2024 Claritas Environics.

3. The percentage of Owner- and Renter-Occupied housing units were adjusted to reflect the state average for counties with high concentrations of Section 8 and government housing units.

TABLE 4C | HOUSING DEMAND PROJECTIONS – TOTAL BY 2045

Total Housing Units Needed by 2045		
	Low Range	High Range
Projected Total Housing Units	1,674	2,044
Projected New Owner-Occupied Housing Units	1,183	1,444
Projected New Renter-Occupied Housing Units	491	600

Table 4D shows the projected housing demand distributed by the number of bedrooms per unit. This distribution is based on current occupied housing units.

TABLE 4D | DISTRIBUTION OF HOUSING UNITS BY ROOMS

Distribution of Housing Units by Number of Rooms ¹			
	Percentage	Low Range	High Range
Projected Total Housing Units	100%	1,674	2,044
One Bedroom or Less	3.9%	65	80
2-3 Bedrooms	85.1%	1,425	1,739
4 Bedrooms or More	11.0%	184	225

1. U.S. Census Bureau American Community Survey 2022 Housing Occupancy by Bedroom for Crockett County.

The current percentage of the population in Crockett County occupying rental housing is slightly higher than the regional average, but lower than the state average. A significant portion of the rental population lives in public housing or government rent-subsidized housing and there are no market-rate multi-family apartment complexes.

Local housing authority officials noted when interviewed for this report that housing vouchers issued in the past few months have gone unused. The potential renters who have been issued these vouchers could not find a rental unit for the value of the voucher because rental prices have been driven up by market rate renters seeking housing in Crockett County. The wage rates related to BOC will not directly generate demand for rent-subsidized housing.

PROJECTED HOUSING AFFORDABILITY

Multiple national studies published since 2020 have shown that the availability of housing, especially that workers can reasonably afford based on their household wages, is among the top three factors in determining where people choose to locate. The other consistently top-rated location decision factors are proximity to high quality public education and commute time to work.

Table 5 below shows the range of home prices that are considered affordable by mortgage lenders based on the existing average annual household wages in Crockett County, and on wages projected to be paid by Ford and SK at BlueOval City. The ranges are shown for single- and double-income households.

Table 5 also shows the range of rental rates that are affordable based on single-income and double-income households earning the Crockett County annual average wage, and the BlueOval projected wage rates. The estimated rental rates are based on national studies of rental cost to income, which indicate that approximately 30% of income is the normal range for an affordable, comfortable monthly rental rate.

TABLE 5 | SINGLE-FAMILY DWELLING & RENTAL PURCHASING POWER – 2025

Projected Annual Average Wage	2023	2024	2025
Crockett County ¹	\$52,876	\$55,520	\$58,296
BlueOval City (BOC) Production ²	\$43,680	\$45,864	\$48,517
BlueOval City (BOC) Technical ²	\$55,561	\$58,339	\$61,256

Estimated Home Purchasing Power Range ³	Low Range	High Range
Crockett County Annual Average Wage – 1 Earner	\$145,739	\$233,183
Crockett County Annual Average Wage – 2 Earners	\$291,478	\$466,365
BOC Production Annual Average Wage – 1 Earner	\$120,393	\$192,629
BOC Production Annual Average Wage – 2 Earners	\$240,786	\$385,258
BOC Technical Annual Average Wage – 1 Earner	\$153,140	\$245,024
BOC Technical Annual Average Wage – 2 Earners	\$306,280	\$490,048

Estimated Monthly Rent Power Range ⁴	Low Range	High Range
Crockett County Annual Average Wage – 1 Earner	\$1,360	\$1,506
Crockett County Annual Average Wage – 2 Earners	\$2,720	\$3,012
BOC Production Annual Average Wage – 1 Earner	\$1,124	\$1,244
BOC Production Annual Average Wage – 2 Earners	\$2,247	\$2,488
BOC Technical Annual Average Wage – 1 Earner	\$1,429	\$1,582
BOC Technical Annual Average Wage – 2 Earners	\$2,859	\$3,165

1. Based upon data from the Tennessee Department of Labor; Annual Average Wage for Crockett County, 2022 for all industries with a 5% inflation factor applied for each year until 2025.

2. Supplied by Tennessee Department of Community and Economic Development based on announced wages in 2022 with a 5% inflation factor for each year until 2025.

3. Fidelity Viewpoints June 2022 recommends a mortgage range of 3-5X annual income.

4. RentCafe.com suggests 30% of annual income for a comfortable and affordable monthly rental rate.



**AFFORDABLE
HOUSING
VALUE RANGE**

\$120,393

LOWEST WAGE
ONE-INCOME
HOUSEHOLD

\$490,048

HIGHEST WAGE
TWO-INCOME
HOUSEHOLD



**AFFORDABLE
MONTHLY
RENT RANGE**

\$1,124

LOWEST WAGE
ONE-INCOME
HOUSEHOLD

\$3,165

HIGHEST WAGE
TWO-INCOME
HOUSEHOLD

CURRENT HOUSING MARKET

The Crockett County construction and residential development pipeline will not currently meet the unconstrained population and housing demand forecast. The entire BlueOval City Impact Zone housing market, like the national housing market, is experiencing an extended housing shortage. New residential construction has not returned to the levels prior to the 2007-2008 financial crisis. Additionally, the COVID-19 pandemic, followed by related housing material shortages, supply chain disruptions, and lack of available labor in the skilled trades have exacerbated the shortage.

SINGLE-FAMILY HOUSING STATISTICS

In rural areas such as Crockett County, new housing starts have been extremely low. From January 2021 through May 2024, there were 70 housing starts reported in Crockett County. Crockett County did experience 1,055 housing starts during 1990-1999 and 748 units from 2000-2009, so the BOC projected demand is not unprecedented for the county.

TABLE 6 | HOUSING STARTS COMPARISON

	Crockett County	Non-Metro West TN Region
Year	Total Housing Starts	Average Housing Starts Per County
2020	0	26.2
2021	0	28.5
2022	34	65.2
2023	25	56.6
2024 (Jan-May)	11	29.8

Source: 2024 U.S. Census Bureau

Note: Housing Starts data was pulled from the U.S. Census Bureau on new home permits only, therefore this data does not match the data for all local housing permits issued.

Much of the existing housing stock in the county is older, with the median age of a house being 47 years versus 37 years for the State of Tennessee. Table 7 on the next page shows the age range of housing for Crockett County, for the Impact Zone non-metro areas, and for Tennessee.

TABLE 7 | AGE OF OWNER-OCCUPIED HOUSING UNITS

	Crockett County		Impact Zone (Non-Metro Areas)		State of TN	
	Count	%	Count	%	Count	%
2024 Est. Housing Units by Year Structure Built						
Built 2020 or Later	34	0.56	2,111	2.67	126,984	4.03
Built 2010 to 2019	239	3.92	5,148	6.50	299,919	9.53
Built 2000 to 2009	748	12.28	14,709	18.58	486,336	15.45
Built 1990 to 1999	1,055	17.32	15,847	20.02	528,972	16.80
Built 1980 to 1989	635	10.43	10,216	12.90	412,165	13.09
Built 1970 to 1979	1,178	19.34	11,915	15.05	448,106	14.23
Built 1960 to 1969	894	14.68	7,732	9.77	295,192	9.38
Built 1950 to 1959	484	7.95	4,647	5.87	253,547	8.05
Built 1940 to 1949	291	4.78	2,911	3.68	127,624	4.05
Built 1939 or Earlier	533	8.75	3,932	4.97	169,147	5.37
2024 Housing Units by Year Structure Built						
2024 Est. Median Year Structure Built	1977		1988		1987	

Source: Claritas Environics 2024 Data

The current market value of existing homes in Crockett County is far below the state and regional values. Table 8 on the next page shows the number of homes by value range.

TABLE 8 | HOUSING UNITS BY VALUE

	Crockett County		Impact Zone (Non-Metro Areas)		State of TN	
	Count	%	Count	%	Count	%
2024 Est. Owner-Occupied Housing Units by Value						
Value Less Than \$20,000	163	4.14	1,311	2.49	37,743	2.02
Value \$20,000 - \$39,999	116	2.95	1,810	3.43	39,994	2.14
Value \$40,000 - \$59,999	166	4.22	1,671	3.17	40,283	2.15
Value \$60,000 - \$79,999	360	9.15	2,756	5.23	59,043	3.16
Value \$80,000 - \$99,999	465	11.82	3,702	7.02	73,713	3.94
Value \$100,000 - \$149,999	1,003	25.50	8,689	16.48	197,373	10.55
Value \$150,000 - \$199,999	548	13.93	7,314	13.88	205,333	10.97
Value \$200,000 - \$299,999	526	13.37	10,667	20.24	392,633	20.98
Value \$300,000 - \$399,999	311	7.91	6,488	12.31	287,869	15.38
Value \$400,000 - \$499,999	178	4.53	3,428	6.50	199,656	10.67
Value \$500,000 - \$749,999	37	0.94	2,931	5.56	180,847	9.67
Value \$750,000 - \$999,999	19	0.48	1,128	2.14	84,454	4.51
Value \$1,000,000 - \$1,499,999	33	0.84	500	0.95	43,488	2.32
Value \$1,500,000 - \$1,999,999	4	0.10	194	0.37	14,073	0.75
Value \$2,000,000 or more	4	0.10	123	0.23	14,552	0.78
2024 Est. Median All Owner-Occupied Housing Value	\$132,579		\$193,341		\$269,743	

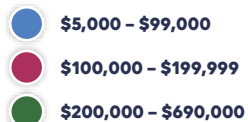
Source: Claritas Environics 2024 Data

Like many rural counties in West Tennessee, Crockett County has had a low number of annual home sales. Data on single-family housing sales from January 2023 to June 2023 are shown in the table below, with Map 3 on the following page depicting where the home sales were located in the county.

TABLE 9 | SOLD HOUSES – JANUARY 2023 TO JUNE 2023

	Crockett
Number Sold	34
Average Price	\$187,600
Average Days on the Market	36.8
Average Year Built	1972
Average Sq. Ft.	1,659
Average Price per Sq. Ft.	\$113
Average # of Bedrooms	3

Source: Multiple Listing Service (MLS)



— County Boundary



34

NUMBER SOLD



\$187,600

AVERAGE PRICE



36.8

AVERAGE DAYS ON THE MARKET



1972

AVERAGE YEAR BUILT



1,659

AVERAGE SQ. FT.



\$113

AVERAGE PRICE PER SQ. FT.



3

AVERAGE # OF BEDROOMS

A query of homes on the market as of August 1, 2024, revealed 43 single-family dwellings and 17 lots for sale throughout Crockett as summarized in Table 10.

TABLE 10 | CROCKETT COUNTY SINGLE-FAMILY DWELLINGS & LOTS

City/Town	Single-Family Dwellings	Lots
Alamo	17	1
Bells	6	4
Crockett Mills	1	0
Friendship	6	6
Gadsden	11	3
Maury City	2	3
Total	43	17

Source: REALTOR.com

MULTI-FAMILY HOUSING STATISTICS

While there are several low-income and Section 8 multi-family units in Crockett County, there were no market-rate apartment complexes. Additionally, the Dyersburg Housing Authority operates 20 units in Crockett County.

TABLE 11 | OWNER- VS RENTER-OCCUPIED HOUSING UNITS

	Crockett County		Impact Zone (Non-Metro Areas)		State of TN	
	Count	%	Count	%	Count	%
2024 Est. Occupied Housing Units – Owner- vs Renter- Occupied						
Housing Units, Owner-Occupied	3,933	70.72	52,712	72.43	1,871,054	65.68
Housing Units, Renter-Occupied	1,628	29.28	20,062	27.57	977,654	34.32

Source: Claritas Environics 2024 Data

The percentage of renter-occupied units in Crockett County is slightly higher than the other counties in the BOC Impact Zone but five percentage points lower than the state, as shown in the table above. This is likely due to the fact there are no market-rate multi-family complexes in the county.

CURRENT RESIDENTIAL DEVELOPMENT PIPELINE

While there is widespread awareness across Tennessee and the greater Southeast region about the BlueOval City project and the anticipated growth it will generate, the initial progress of new residential development has been slow. It is challenging to gather complete information on the plans of private developers who are assessing the county for potential projects.

The city and county mayors, as well as local real estate agencies and local landowners are often approached by potential developers and others who are evaluating the Crockett County market for residential investments. This report, supported by other reports from West TN Planning, can help developers with their evaluations.

Based on interviews with representatives of the county and municipalities, plans have been approved for a new subdivision in Friendship and seven new homes are currently under construction in the county. At this time, no plans have been submitted or approved for multi-family developments.

Tables 12A and 12B on the next two pages show the residential pipeline for the county and towns.

TABLE 12A | NEW SINGLE-FAMILY & MULTI-FAMILY HOUSING DEVELOPMENTS PLANS

Town of Alamo			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Mayor Emison
Total	0		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	Mayor Emison
Total	0		
City of Bells			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	No Answer
Total	0		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	No Answer
Total	0		
City of Friendship			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Mayor Burnett
Total	0		
Single-Family			
Name	Units	Status	Source
Morning View / Cedar Point Subdivision	35	Active Development	Mayor Burnett
Total	35		

Note: Due to limited information from local agencies, the data provided is not guaranteed. More developments could be underway and the current assumptions are subject to change.

TABLE 12B | NEW SINGLE-FAMILY & MULTI-FAMILY HOUSING DEVELOPMENTS PLANS

Town of Gadsden			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	Mayor Smith
Total	0		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	Mayor Smith
Total	0		
Town of Maury City			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	No Answer
Total	0		
Single-Family			
Name	Units	Status	Source
No Developments	0	-	No Answer
Total	0		
Crockett County			
Multi-Family			
Name	Units	Status	Source
No Developments	0	-	No Answer
Total	0		
Single-Family			
Name	Units	Status	Source
Fire District	7	Active Development	Gadsden Mayor Smith
Total	7		
Housing Pipeline	Prospective	Approved	Total
Multi-Family	0	0	0
Single-Family	0	42	42
Total	0	42	42

Note: Due to limited information from local agencies, the data provided is not guaranteed. More developments could be underway and the current assumptions are subject to change.

NEW HOUSING DEVELOPMENT CAPACITY

A mathematical analysis of land use finds that approximately 2,221 housing units could be constructed within the city and town limits in Crockett County.

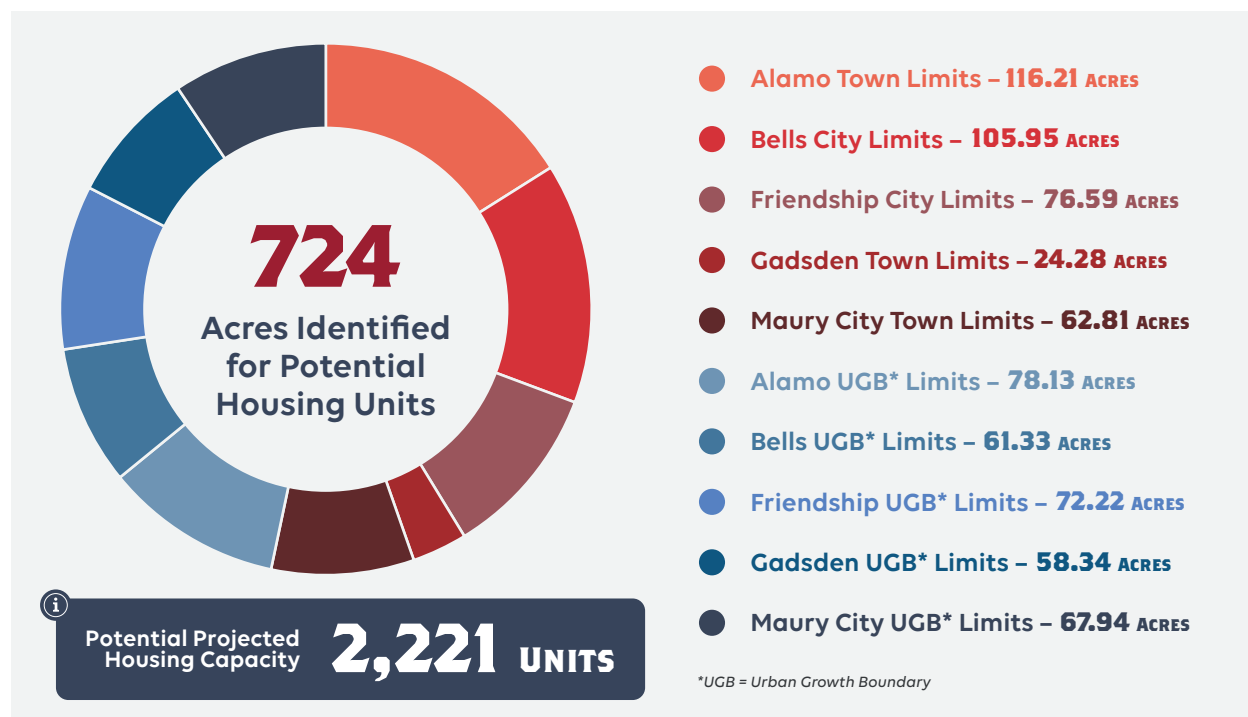
This was critical for planning because the population forecast, by design, was based on where people would likely choose to live. The population forecast did not evaluate availability of land or constraints in meeting the housing demand. **This analysis finds that there is sufficient developable land to meet the forecasted housing demand.**

TABLE 13 | CROCKETT COUNTY ACREAGE BREAKDOWN

	Total Acreage
Crockett County	170,055
Alamo Town Limits	1,474
Alamo UGB* Limits	6,918
Bells City Limits	1,500
Bells UGB* Limits	3,577
Friendship City Limits	854
Friendship UGB* Limits	4,195
Gadsden Town Limits	717
Gadsden UGB* Limits	3,542
Maury City Town Limits	722
Maury City UGB* Limits	4,157

*UGB = Urban Growth Boundary

GRAPHIC 4 | CROCKETT COUNTY POTENTIAL DEVELOPABLE LAND AT A GLANCE



However, the population and housing demand forecasts will only reach the full projected potential if current constraints are eliminated.

Constraints include:

(Identified in the West TN Planning Listening Sessions)

- » Lack of sewer and water capacity in many parts of the county outside of Alamo and Bells.
- » Potential upgrades needed for county roads to handle growth.
- » Emergency services capacity including police, fire, and other public services; and school and childcare capacity.
- » Need to expand retail, personal services, and entertainment options to be competitive with other more populous counties attracting newcomers.

Tables 14A & 14B detail the potential development capacity for each locality based on current land use, and jurisdictional boundaries. Areas for development, based on the noted calculation methodology, have been color-coded on Maps 4-8, however the calculations only include a percent of the colored areas within the town/city limits.

These are mathematical calculations of potential development capacity, not recommendations on development location. They should not be considered to be consistent with any approved future land use or other planning documents that may be adopted, nor is this an indication of where new development will actually occur.

The assumptions and data sources for these calculations can be found below.

ASSUMPTIONS:

- A. The assumed percentages of property that could be developed within town limits are listed in the table as "developable acres." The percentages chosen are based on general sentiment from leadership and the community for how rural areas should be developed in the region to preserve agricultural land, reduce sprawl, and maintain the compact, small town character of the region. This concept to concentrate new development around existing infrastructure also provides for a more fiscally responsible development pattern.
- B. For the purpose of the calculations in this study, areas outside of town/city limits were not considered for new housing development, although there are areas within UGBs where housing could be considered if land and utility infrastructure were available.
- C. The other properties assumed for no housing development include: any land with a current structure, semi-public, public, utilities, right-of-way, railroad, airports, floodzone areas, and conservation or protected lands.
- D. Due to the large tracts of land identified, it is assumed new right-of-way will need to be factored into the density calculations; therefore, conservative calculations for units per acre (DU/acre) were used. These are assumed to be single-family residences, but additional density is expected in some areas to accommodate a variety of unit types and sizes such as duplexes, townhomes and multi-family units consistent with what is allowed in jurisdictional zoning codes.

DATA SOURCES:

1. Existing land use from Tennessee Comptroller of the Treasury, downloaded July 2023.
2. Town limits and Urban Growth Boundaries.
3. Development Capacity Methodology

TABLE 14A | HOUSING MARKET DEVELOPMENT CAPACITY SUMMARY

Parcels By Location	%	Total Parcel Acreage	Developable Acres based on %	DU/Acre Assumption	Units
Parcels within UGB, but not in town limits or floodplain					
Alamo UGB					
Agricultural Tract w/SFR & w/Mobile Home	0%	20.67	0.00	2	0
Agricultural Tract Unimproved (No SFR)	0%	1,709.90	0.00	2	0
Agricultural Tract w/Mobile Home(s)	0%	99.59	0.00	2	0
Agricultural Tract w/SFR	0%	940.60	0.00	2	0
Vacant Lot – less than 5 acres	85%	28.07	23.86	2	48
Vacant Tract – 5 acres or larger	40%	135.67	54.27	2	109
TOTAL		2,934.50	78.13		157
Bells UGB					
Agricultural Tract Unimproved (No SFR)	0%	937.69	0.00	2	0
Agricultural Tract w/SFR	0%	278.95	0.00	2	0
Vacant Lot – less than 5 acres	85%	19.65	16.70	2	33
Vacant Tract – 5 acres or larger	85%	52.51	44.63	2	89
TOTAL		1,288.80	61.33		122
Friendship UGB					
Agricultural Tract w/SFR & w/Mobile Home	0%	10.35	0.00	2	0
Agricultural Tract Unimproved (No SFR)	0%	1,748.01	0.00	2	0
Agricultural Tract w/SFR	0%	588.94	0.00	2	0
Vacant Lot – less than 5 acres	85%	7.80	6.63	2	13
Vacant Tract – 5 acres or larger	60%	109.32	65.59	2	131
TOTAL		2,464.42	72.22		144
Gadsden UGB					
Agricultural Tract w/SFR & w/Mobile Home	0%	27.71	0.00	2	0
Agricultural Tract Unimproved (No SFR)	0%	666.30	0.00	2	0
Agricultural Tract w/Mobile Home(s)	0%	33.89	0.00	2	0
Agricultural Tract w/SFR	5%	999.25	49.96	2	100
Vacant Lot – less than 5 acres	85%	9.20	7.82	2	16
Vacant Tract – 5 acres or larger	5%	11.25	0.56	2	1
TOTAL		1,747.60	58.34		117
Maury City UGB					
Agricultural Tract Unimproved (No SFR)	0%	2,005.02	0.00	2	0
Agricultural Tract w/Mobile Home(s)	0%	16.49	0.00	2	0
Agricultural Tract w/SFR	0%	894.00	0.00	2	0
Vacant Lot – less than 5 acres	60%	14.97	8.98	2	18
Vacant Tract – 5 acres or larger	60%	98.27	58.96	2	118
TOTAL		3,028.75	67.94		136

TABLE 14B | HOUSING MARKET DEVELOPMENT CAPACITY SUMMARY

Parcels By Location	%	Total Parcel Acreage	Developable Acres based on %	DU/Acre Assumption	Units
Parcels within Town Limits, but not in floodplain					
Alamo Town Limits					
Agricultural Tract Unimproved (No SFR)	10%	162.24	16.22	4	65
Agricultural Tract w/SFR	0%	29.94	0.00	4	0
Vacant Lot – less than 5 acres	60%	77.25	46.35	4	185
Vacant Tract – 5 acres or larger	85%	63.10	53.64	4	215
TOTAL		332.53	116.21		465
Bells City Limits					
Agricultural Tract Unimproved (No SFR)	10%	95.40	9.54	4	38
Agricultural Tract w/SFR	0%	52.61	0.00	4	0
Vacant Lot – less than 5 acres	60%	90.21	54.13	4	217
Vacant Tract – 5 acres or larger	60%	70.47	42.28	4	169
TOTAL		308.69	105.95		424
Friendship City Limits					
Agricultural Tract Unimproved (No SFR)	10%	327.58	32.76	4	131
Agricultural Tract w/SFR	0%	30.78	0.00	4	0
Vacant Lot – less than 5 acres	60%	54.92	32.95	4	132
Vacant Tract – 5 acres or larger	60%	18.13	10.88	4	44
TOTAL		431.41	76.59		307
Gadsden Town Limits					
Agricultural Tract w/SFR & w/Mobile Home	0%	6.78	0.00	4	0
Agricultural Tract Unimproved (No SFR)	5%	132.71	6.64	4	27
Agricultural Tract w/Mobile Home(s)	0%	13.94	0.00	4	0
Agricultural Tract w/SFR	0%	73.83	0.00	4	0
Vacant Lot – less than 5 acres	60%	29.40	17.64	4	71
Vacant Tract – 5 acres or larger	0%	27.96	0.00	4	0
TOTAL		284.62	24.28		98
Maury City Town Limits					
Agricultural Tract Unimproved (No SFR)	5%	118.80	5.94	4	24
Agricultural Tract w/SFR	0%	108.99	0.00	4	0
Vacant Lot – less than 5 acres	60%	44.77	26.86	4	107
Vacant Tract – 5 acres or larger	60%	50.01	30.01	4	120
TOTAL		322.57	62.81		251
TOTALS CROCKETT COUNTY		13,144	724		2,221



This land use map was utilized to inform potential areas for future development. Parcels that were already developed or within a floodplain or preservation area were omitted from the analysis. Only properties within the Town Limits were considered for the calculations on pages 27-28.



City/Town Limits



Urban Growth Boundaries

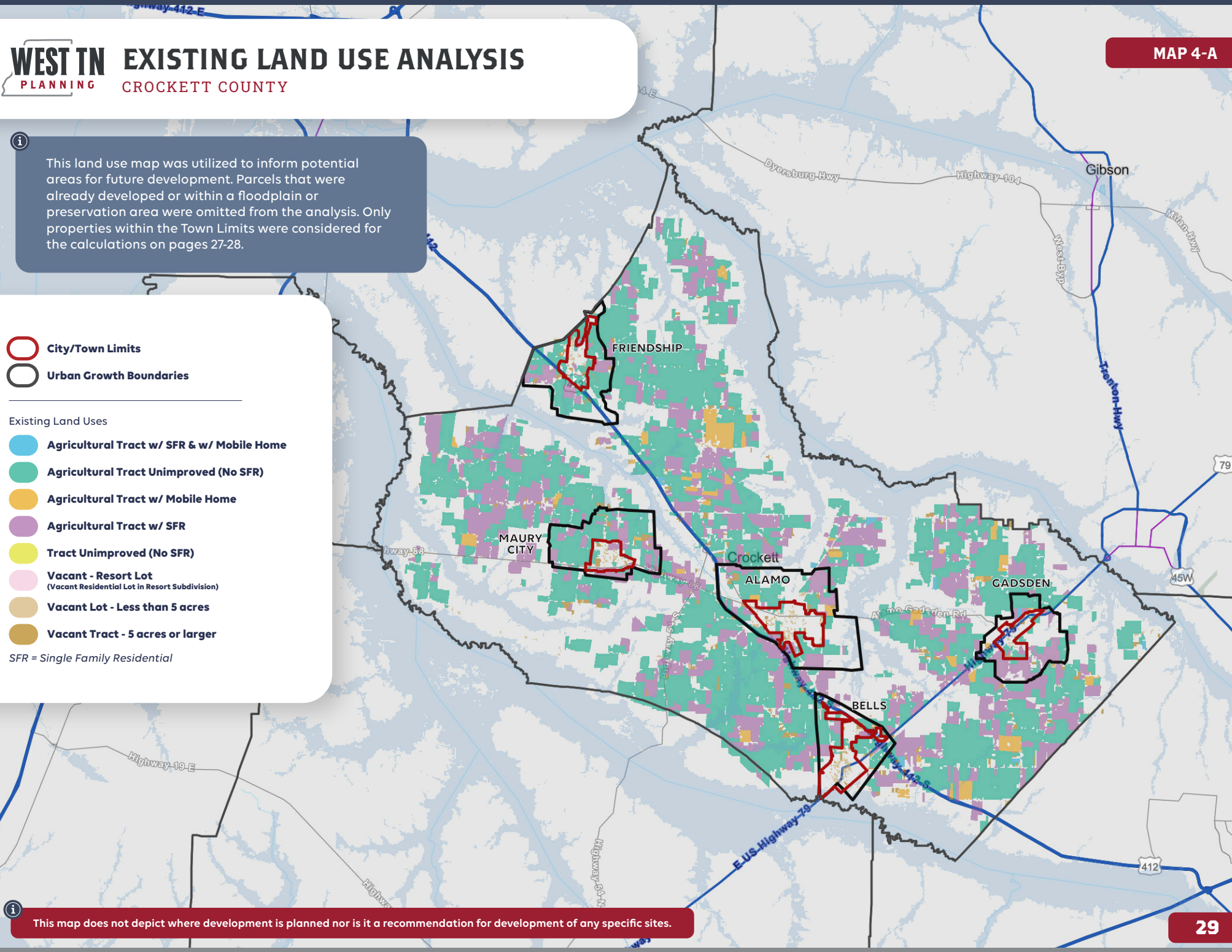
Existing Land Uses

- Agricultural Tract w/ SFR & w/ Mobile Home
- Agricultural Tract Unimproved (No SFR)
- Agricultural Tract w/ Mobile Home
- Agricultural Tract w/ SFR
- Tract Unimproved (No SFR)
- Vacant - Resort Lot
(Vacant Residential Lot in Resort Subdivision)
- Vacant Lot - Less than 5 acres
- Vacant Tract - 5 acres or larger

SFR = Single Family Residential



This map does not depict where development is planned nor is it a recommendation for development of any specific sites.





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City/Town Limits



Urban Growth Boundaries



Public Schools



TN Certified Sites

Existing Land Uses



Agricultural Tract w/ SFR & w/ Mobile Home



Agricultural Tract Unimproved (No SFR)



Agricultural Tract w/ Mobile Home



Agricultural Tract w/ SFR



Tract Unimproved (No SFR)



Vacant - Resort Lot
(Vacant Residential Lot in Resort Subdivision)



Vacant Lot - Less than 5 acres



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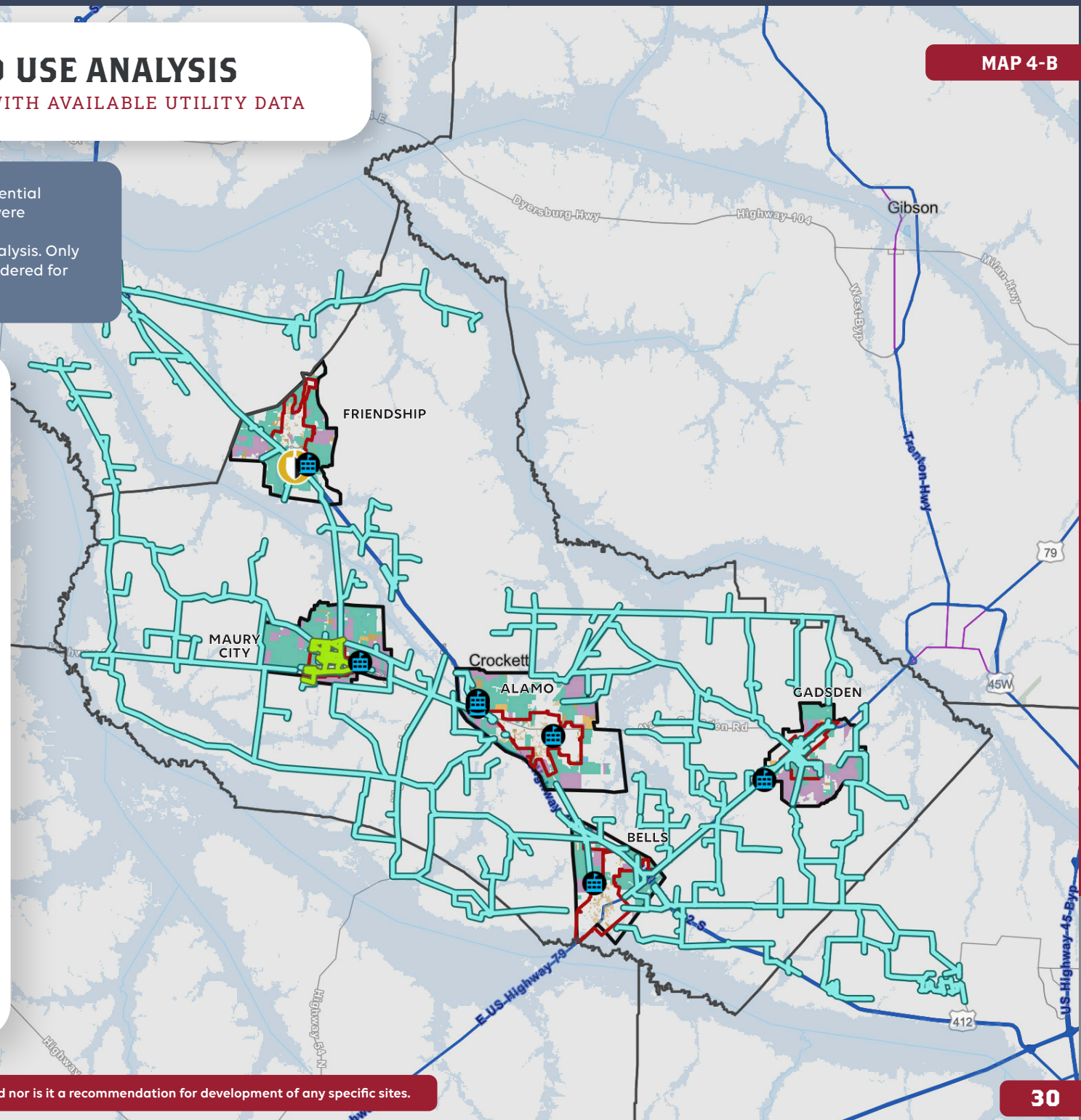


Water Lines



Sewer Lines

Utility Note: Maury City sewer lines and County-wide Utility District water lines are shown. At the time of this report digitized files were not available for Alamo (water and sewer), Bells Public Utility (water and sewer), Crockett Mills Utility District (water), or Friendship (water and sewer), although the county utility district water lines overlap with some of these areas.



This map does not depict where development is planned nor is it a recommendation for development of any specific sites.

This map highlights parcels that fit within land use categories where future development could potentially occur. However, only a small percentage of these areas was utilized to calculate the development potential shown on pages 27-28.

-  **City/Town Limits**
-  **Urban Growth Boundaries**
-  **Public Schools**
-  **TN Certified Sites**

Existing Land Uses

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Although parcels at this scale are hard to see, there are opportunities for infill within the city limits.

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-  TN Certified Sites

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City/Town Limits



Urban Growth Boundaries



Public Schools



TN Certified Sites

Existing Land Uses

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Agricultural Tract Unimproved (No SFR)

Agricultural Tract w/ Mobile Home

Agricultural Tract w/ SFR

Tract Unimproved (No SFR)

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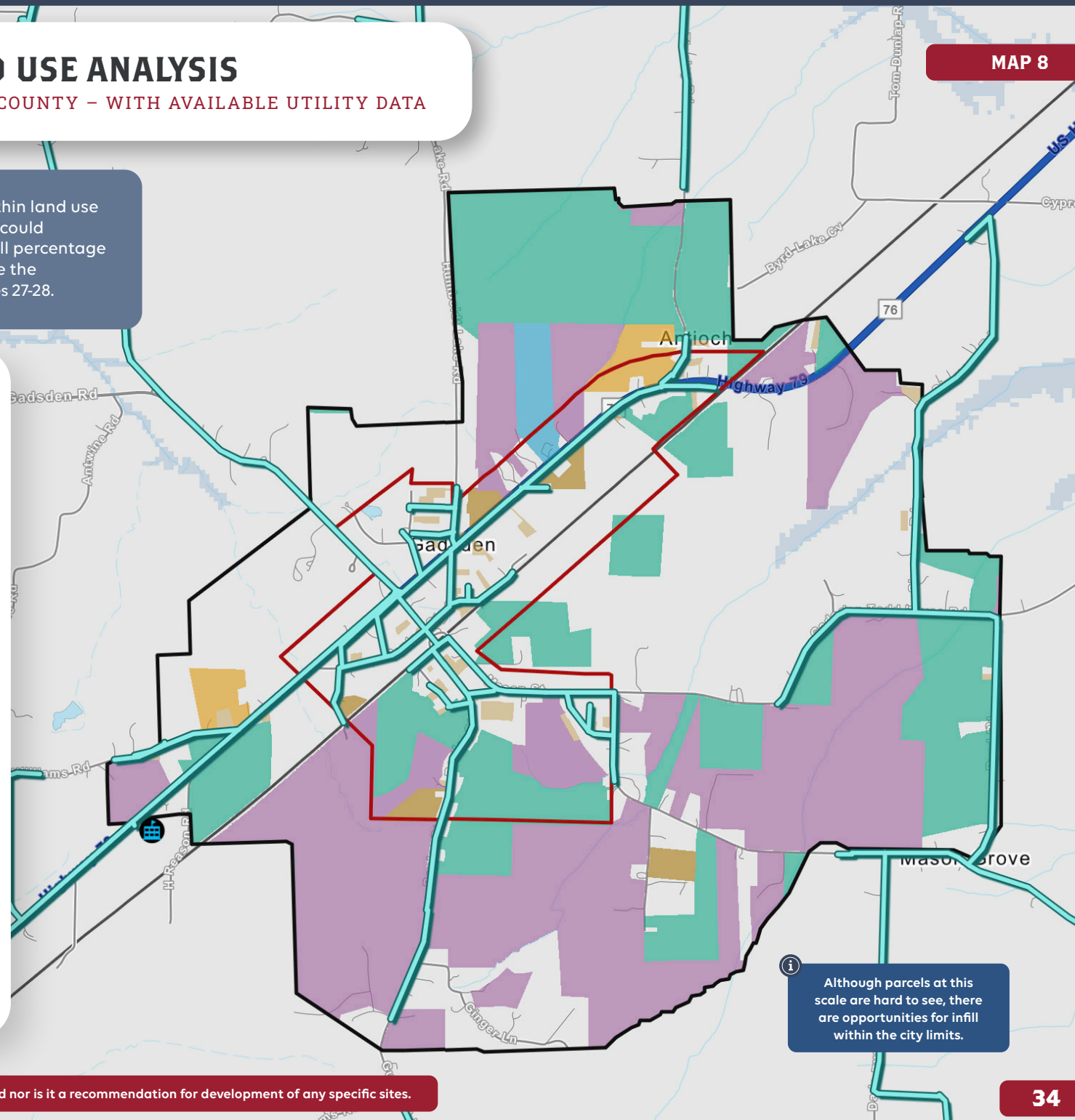
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- Sewer Lines

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City/Town Limits



Urban Growth Boundaries



Public Schools



TN Certified Sites

Existing Land Uses



Agricultural Tract w/ SFR & w/ Mobile Home



Agricultural Tract Unimproved (No SFR)



Agricultural Tract w/ Mobile Home



Agricultural Tract w/ SFR



Tract Unimproved (No SFR)



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(Vacant Residential Lot in Resort Subdivision)



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Sewer Lines

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This map does not depict where development is planned nor is it a recommendation for development of any specific sites.



Although parcels at this scale are hard to see, there are opportunities for infill within the city limits.

RECOMMENDATIONS

The following recommendations should be considered the initial framework for Crockett County to address and prioritize the needs outlined in this report

1

Promote infill development. There are numerous opportunities to build within existing residential areas by renovating or replacing substandard housing, or to build housing in defunct commercial areas.

2

Increase density within the municipal boundaries. Update the zoning ordinances where applicable, or establish zoning regulations to allow for a variety of lot sizes and housing types. This will provide a mix of housing choices that can serve all age groups from young workers seeking their first housing to working families, to seniors. Zoning that allows for duplexes, fourplexes, townhouses, condos and other housing choices in addition to traditional development can help meet the needs of a range of working age people, allow seniors to downsize, and maximize the use of existing infrastructure. Completing a county-wide strategic plan would be a valuable tool not only for planning and zoning, but also for grant and fundraising opportunities.

3

Focus development within the town limits first and Urban Growth Boundaries nearest to the municipal boundaries and water and wastewater infrastructure to protect farmland and environmentally sensitive areas. Developing areas with existing utility services will facilitate faster residential development to meet current housing demand. This will also allow more time for planning and financing essential investments to support growth over the next 20 years.

4

Accelerate planning and development of water along the U.S. Hwy 412 corridor. This provides not only opportunities for residential development, but also creates more opportunities for needed commercial development along this key corridor that connects I-55 to I-40.

5

Utilize opportunities to develop regional infrastructure assets. Funding is more readily available for regional projects. Regionalization or partnerships may be the best option for utilities with small customer bases due to the cost to operate, maintain, and improve capital assets.

6

Enforce and adhere closely to building codes. The Tennessee state building code is a minimum baseline for communities and areas in the county that do not have local building codes. Blight removal increases community safety and helps stabilize property values by not allowing sub-standard structures to devalue neighborhoods. Communities that have code enforcement demonstrate the positive effect of code enforcement and blight removal.

7

Prepare to use Tax Increment Financing to assist in the construction of mixed-use developments. This tool can help attract apartment buildings and quality residential density by providing public features such as parks, walking paths and recreation centers.

8

Remember that retail (and services) follows rooftops. Utilize population and housing growth projections to assist in recruiting new retailers and encouraging local business start-ups.

9

Ensure that local contacts are clearly identified on all relevant websites so that residential developers can easily contact the appropriate individuals in each community. Since Crockett County and some municipalities do not have a website, the county could develop a site that lists each community's direct phone numbers or email addresses for local officials who can provide information to residential developers.

10

Develop protocols for handling large residential development inquiries that are similar to the successful protocols used in Crockett County for handling industrial development.

11

Participate in a professional, regional approach to attract developers, investors, and corporations in the building industry. Large-scale residential developers could be targeted in order to familiarize them with Crockett County.

12

Improve communications across all county and municipal representatives and real estate brokers involved in marketing property and shepherding projects through the planning and approval process.

13

Explore forming partnerships with major employers to increase quality-of-life amenities. Some strategies implemented by employer partnerships in other areas of the country include building a day care facility or funding neighborhood playgrounds or pools within larger residential developments. Employees of the sponsoring employer receive preference in obtaining homes for sale in the development. These strategies could help overcome lack of amenity density for families with young children.

ACKNOWLEDGMENTS

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TOWN OF

Alamo

CITY OF

Bells

CITY OF

Friendship

TOWN OF

Gadsden

TOWN OF

Maury City