

# Planning Lunches at Noon (PLAN) Monthly Webinar Series

Welcome to the January 2026 PLAN Webinar!

“Housing Update”

Check out OPD’s [Planning and Zoning Training webpage](#) for:

- Slides and recording of past PLAN Webinars and conferences
- Planning Board and Zoning Board 101 slides and recordings
- Planning Board and Zoning Board Handbooks
- Optional Tests and Certificates

# Planning Lunches at Noon (PLAN) Monthly Webinar Series

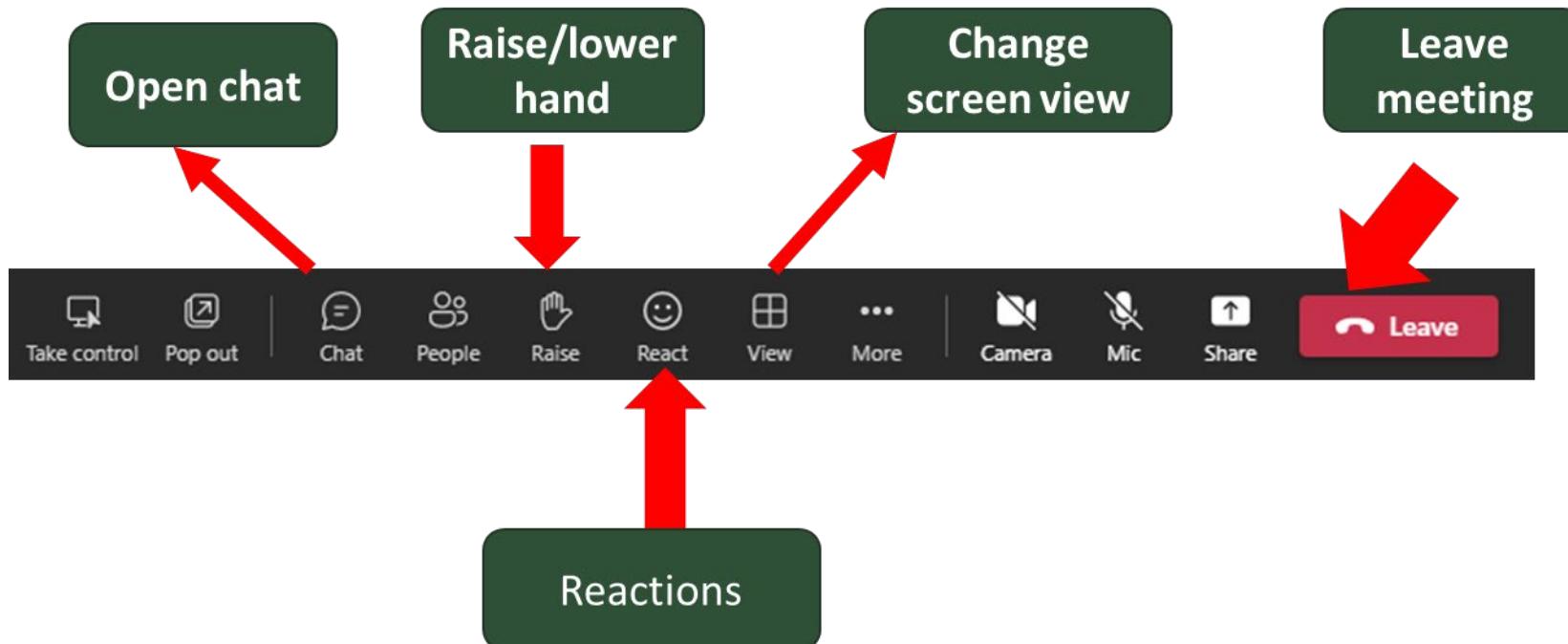
## “Housing Update”

### AGENDA

- New Hampshire’s Housing Supply – 2025
  - *Ken Gallager, NH BEA*
- Review of the Town of Newmarket’s Efforts to Address Its Housing Needs
  - *Bart McDonough, Director of Newmarket Planning and Community Development*

# How To Participate

- ▶ For questions, type them into the chat box
- ▶ We will do our best to answer all questions by the end of the webinar



# NEW HAMPSHIRE'S HOUSING SUPPLY

*Current Estimates and Trends*

**Update: 2025**

**NH Office of Planning and Development**

# Background

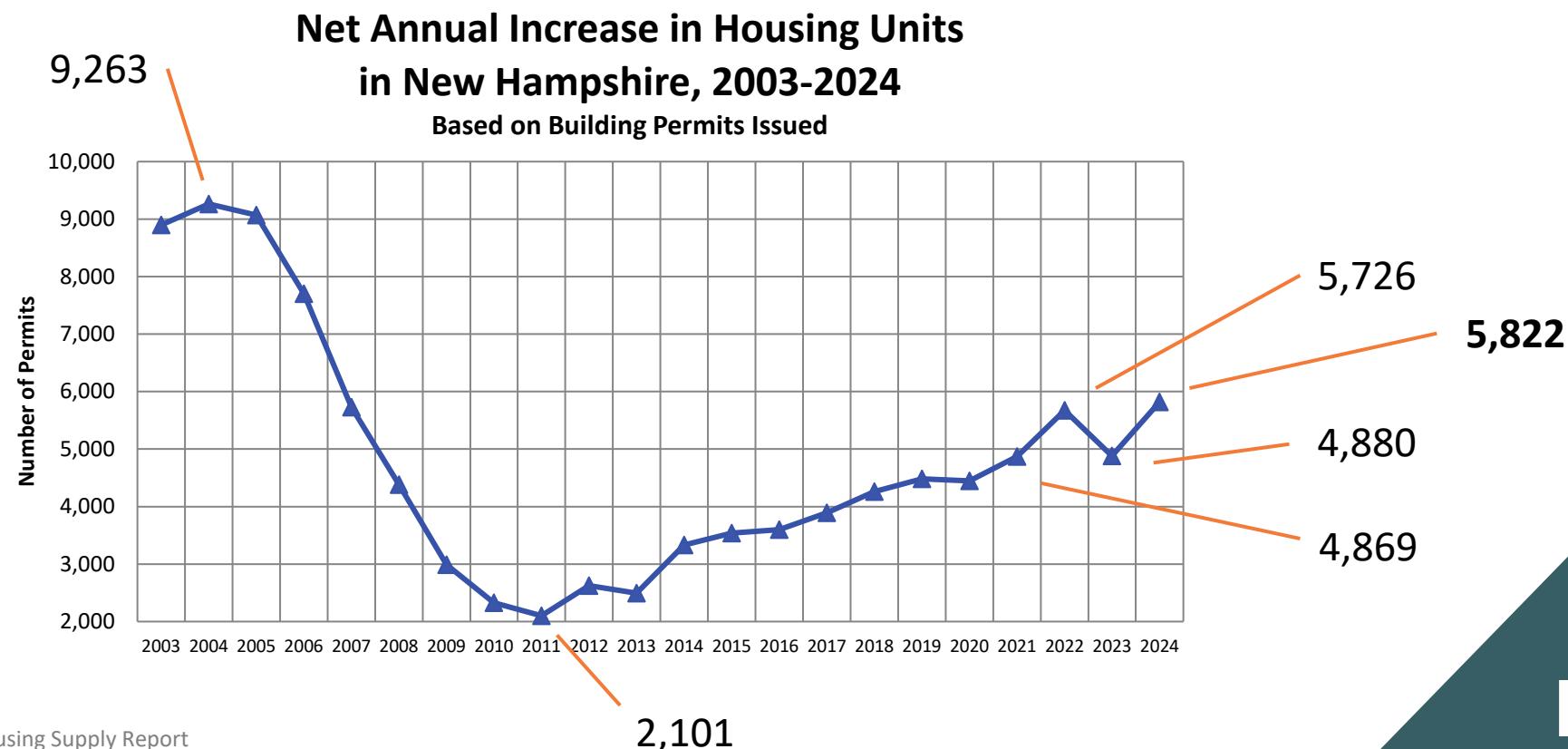
- RSA 78-A:25 directs the Office of Planning and Development (OPD) to **“estimate annually the resident population for all cities and towns...as of July 1 of the preceding year”**
- Two components:
  - Group quarters
  - **Housing units** – calculated from annual dwelling unit survey
- Towns and cities report all building permits issued in previous year and resulting number of permitted dwelling units
- Assumption is that housing is built within six months of permit being issued (i.e. before July 1)
- We remove units from our totals the following year if the community reports that any permits have expired

# Limitations of the Dwelling Unit Survey

- It is not a comprehensive housing survey
  - Does not gather assessed value
  - Does not gather physical attributes (size, materials, rooms, etc.)
  - Does not split out ADUs
  - No addresses are collected; only gathers total numbers per municipality
  - Not all permitted units might be built
  - Complete municipal coverage, but therefore less timely

# Results

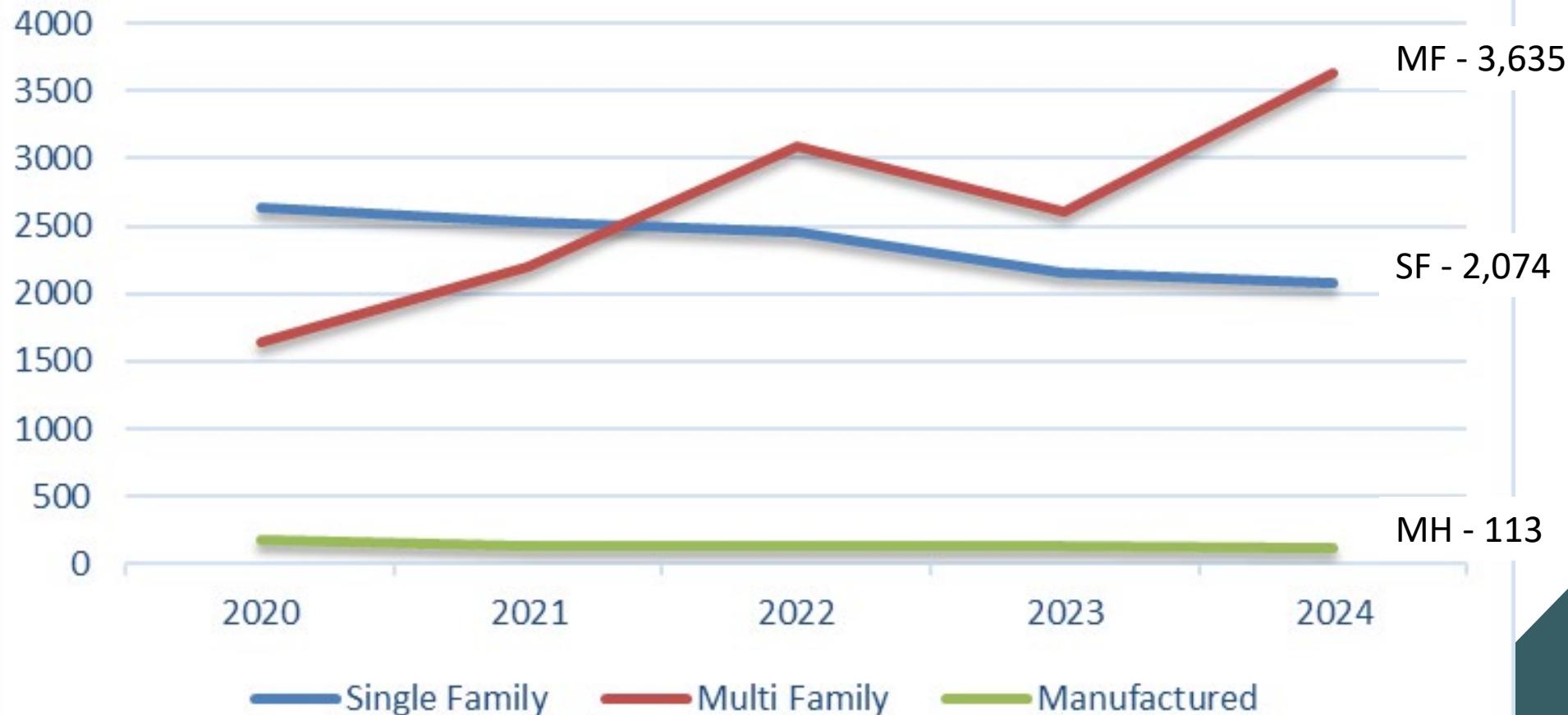
- Rebound in total number of units permitted after dip in 2008
- Most units added in a year since 2006
- The state has added over 25,600 units since 2020, which is 78.5% of the 2025 target in NH Housing's Statewide Housing Needs Assessment



# Permits issued – State totals

- 2024 – Permits issued for 5,822 dwelling units:
  - Single-family: 2,074 (35.6%) (*73 fewer than in 2023*)
  - Multi-family: 3,635 (62.4%) (*1,034 more*)
    - 2 units: 782 (*126 more*)
    - 3-4 units: 362 (*190 more*)
    - 5+ units: 2,491 (*718 more*)
  - Manufactured housing: 113 (1.9%) (*18 fewer*)
- 2023 – Single-family 45.9%, Multi-family 51.9%, Manufactured 2.7%
- 2022 – Single-family 43.2%, Multi-family 54.5%, Manufactured 2.3%
- 2021 – Single-family 52.1%, Multi-family 45.2%, Manufactured 2.6%

# Units Permitted by Housing Type 2020-24

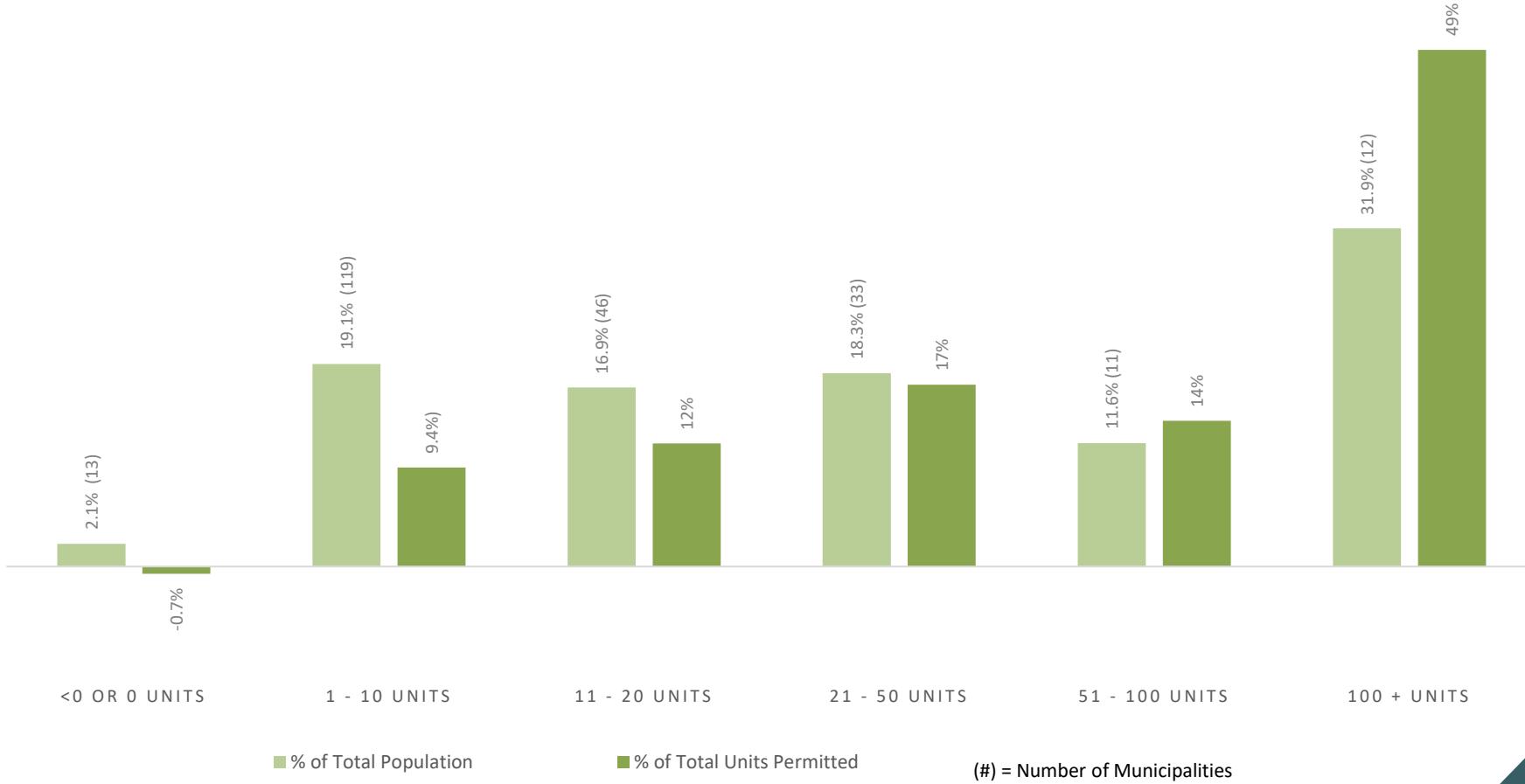


# Patterns of permitting

- 2024 saw a continued pattern of a large portion of permitting occurring in a relatively small number of communities in the state
- 12 communities (32% of NH population) permitted 49% of total housing units
  - *In 2023, 11 communities (28% of NH population) permitted 50% of total housing units*
- Each of those 12 communities permitted 100 or more units:
  - Dover (500, up from 226)
  - Londonderry (372, up from 54)
  - Manchester (364, down from 683 )
  - Rochester (266, up from 125)
  - Portsmouth (249, up from 238)
  - Lebanon (218, down from 240)
  - Somersworth (160, up from 18)
  - Nashua (159, down from 352)
  - Derry (155, up from 26)
  - Concord (147, up from 137)
  - Litchfield (140, up from 15)
  - Brookline (111, up from 6)

## Permitting patterns, contd.

% OF HOUSING UNITS PERMITTED BY MUNICIPALITY RELATIVE TO % OF POPULATION



# Permitting Patterns Statewide

Map 2.  
Housing Units Permitted in  
New Hampshire by Municipality

Calendar Year 2024

Units permitted:

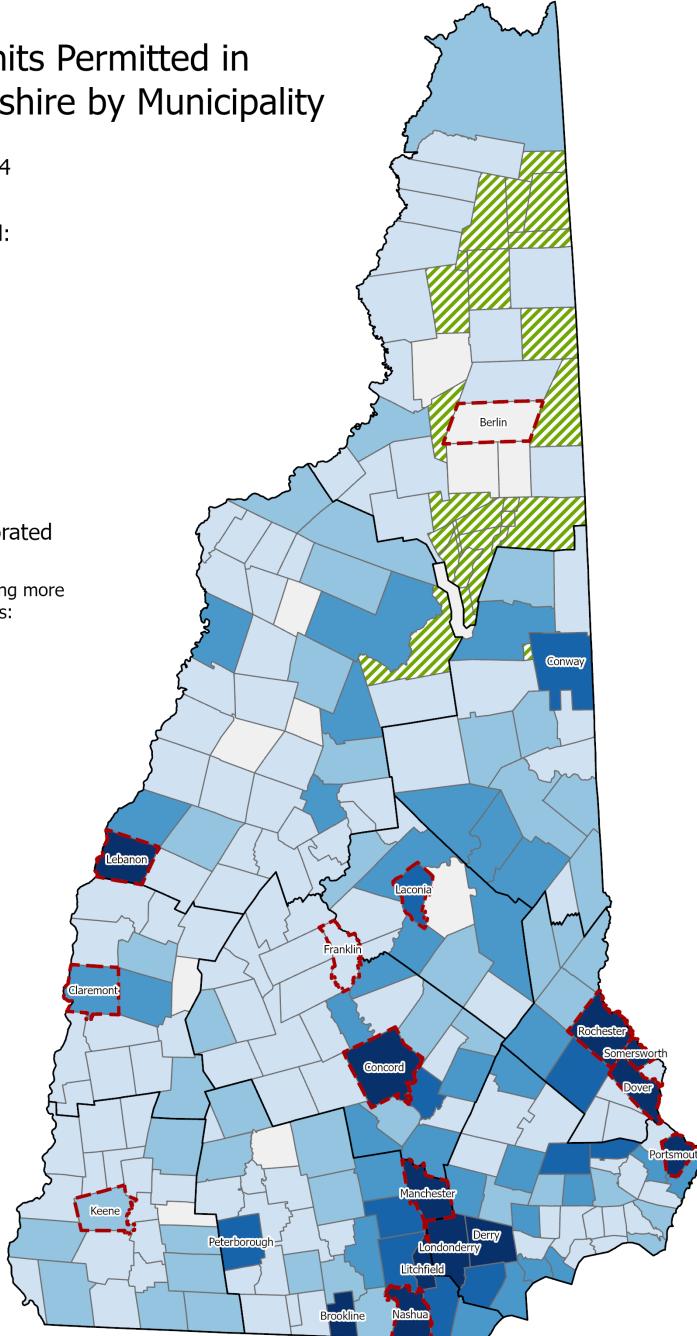
- 0 or loss
- 1 - 10
- 11 - 20
- 21 - 50
- 51 - 100
- > 100

 City

 Unincorporated

Municipalities permitting more  
than 100 housing units:

1. Dover 500
2. Londonderry 372
3. Manchester 364
4. Rochester 266
5. Portsmouth 249
6. Lebanon 218
7. Somersworth 160
8. Nashua 159
9. Derry 155
10. Concord 147
11. Litchfield 140
12. Brookline 111



# County Overview

Housing growth is concentrated in the four southeastern counties plus Grafton

Note the higher percentage of single-family in the other five counties

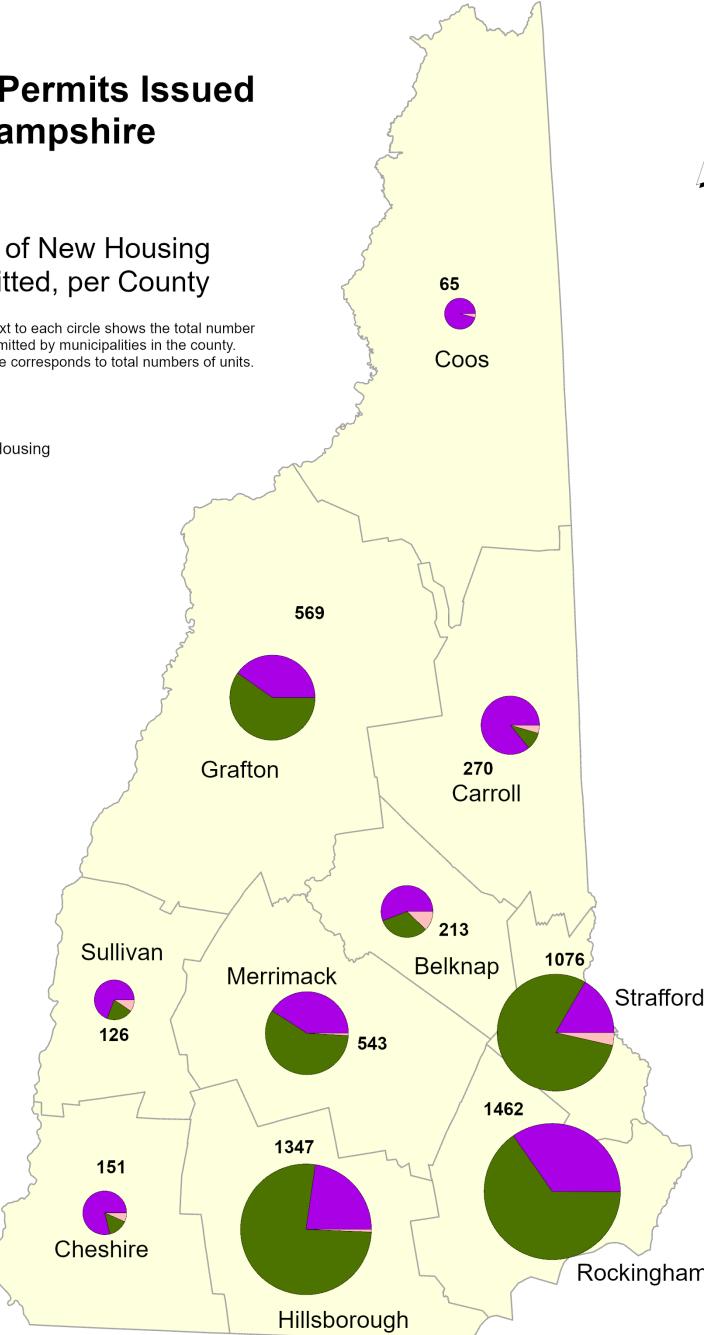
## Map 1: Building Permits Issued in New Hampshire

2024

Distribution of New Housing  
Units Permitted, per County

Numeral next to each circle shows the total number  
of units permitted by municipalities in the county.  
Size of circle corresponds to total numbers of units.

- Single Unit
- Multi Unit
- Manufactured Housing



# Differences by county

- Most single-family units permitted:
  - Rockingham (507), Hillsborough (306), Carroll (232), Grafton (230)
  - *Previous year: Rockingham (574), Hillsborough (340), Grafton (281), Carroll (237)*
- Most multi-family units permitted:
  - Hillsborough (1,032), Rockingham (954), Strafford (859), Grafton (342)
  - *Previous year: Hillsborough (1,246), Rockingham (316), Strafford (282), Grafton (275)*
- In five counties (Grafton, Hillsborough, Merrimack, Rockingham and Strafford) there were more permits for multi-family than single-family housing (*compared to 2 in previous year*)
- Five counties (Cheshire, Grafton, Merrimack, Rockingham, and Strafford) had more permits for multi-family than in previous year
- Five counties (Carroll, Cheshire, Merrimack, Strafford, and Sullivan) had more single-family permits than in previous year

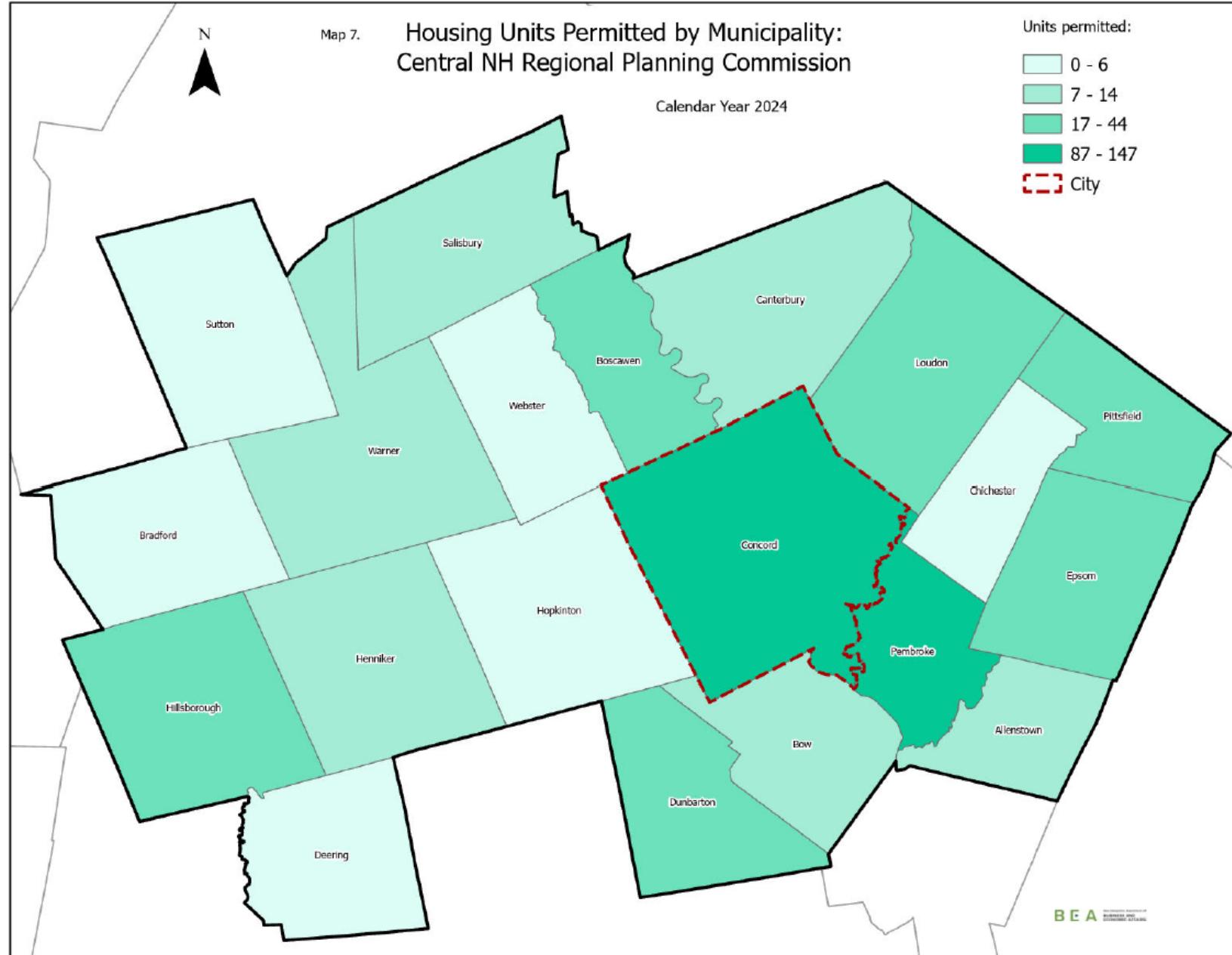
# Municipalities

- Most single-family units permitted:
  - Epping (76), Conway (44), Dover, (44), Barrington, (42), Portsmouth (42), Londonderry (39)
  - *Previous year: Portsmouth (110), Epping (79), Dover (66), Pelham (64), Laconia (54), Merrimack (42)*
- Most multi-family units permitted:
  - Dover (456), Manchester (345), Londonderry (332), Rochester (232), Lebanon (210), Portsmouth (206)
  - *Previous year: Manchester (666), Nashua (331), Lebanon (211), Dover (159), Merrimack (130), Portsmouth (121)*
- Greatest percentage increase in total housing stock:
  - Brookline (111 units, 5.63%), Litchfield (140, 4.37%), Londonderry (372, 3.53%)
  - Dover (500, 3.18%), ... 9 additional with more than 2%

# Measuring Progress

Region	'20 - '24 Housing Units Permitted*	'20 - '24 Year-Round Housing Units Needed
Central New Hampshire Regional Planning Commission	1,822	3,028
Lakes Region Planning Commission	2,629	2,815
Nashua Regional Planning Commission	3,927	5,143
North Country Council	2,202	1,782
Rockingham Planning Commission	3,839	5,352
Southern New Hampshire Planning Commission	4,405	7,212
Southwest Region Planning Commission	1,241	1,873
Strafford Regional Planning Commission	3,406	3,289
Upper Valley Lake Sunapee Regional Planning Commission	2,217	2,210
<b>New Hampshire</b>	<b>25,688</b>	<b>32,704</b>

\*including seasonal units



## Example of Housing Units Permitted by Region

# Housing Champion Program

- In 2025, 10 municipalities were designated as Housing Champions, bringing the total to 28.
- Communities can apply for designation by documenting that they:
  - Have zoning and land use regulations which promote workforce housing
  - Train members of their land use boards on appropriate procedures and on the laws that apply to board members
  - Implement sewer and water infrastructure improvements
  - Implement public transportation and walkability infrastructure such as sidewalks
- Designation makes communities eligible for funding that supports housing production and housing infrastructure
- [Housing Champion Program](#) website

# Housing Champion Program

- In 2024, the 28 Housing Champion communities approved 2,643 units, or 45% of the total units approved statewide
- Boscawen – 35
- Concord – 147
- Derry – 155
- Dover – 500
- Enfield – 9
- Exeter – 13
- Farmington – 11
- Gorham (-3)
- Hampton – 17
- Hillsborough – 18
- Hinsdale – 6
- Hooksett – 30
- Jaffrey – 15
- Keene – 15
- Lebanon – 218
- Lincoln – 32
- Manchester – 364
- Meredith – 33
- Nashua – 159
- New London – 5
- Newmarket – 74
- Newport – 26
- Plymouth – 26
- Portsmouth – 249
- Rochester – 266
- Rye – 23
- Salem – 40
- Somersworth - 160

# Takeaways

- The state has bounced back from a dip in housing units permitted during 2023, with 2024 seeing the highest number of units permitted now since 2006. Overall, the state has added 25,688 units between 2020 and 2025
- The state is in a multi-year trend of the number of multi-family units (2 or more units) permitted increasing while the number of single-family units permitted is decreasing
- There is also a multi-year trend where a smaller number of communities, mainly cities and large towns, account for a majority of housing units permitted
- Remember that while the report assumes all units permitted in 2024 were built by July 1, 2025, it remains difficult to know how many units permitted in 2024 have been completed or are under construction.

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# TRENDS IN HOUSING PERMITTING AND INNOVATIVE ZONING WEBINAR

## REVIEW OF THE TOWN OF NEWMARKET'S EFFORTS TO ADDRESS ITS HOUSING NEEDS

Presenting: Bart McDonough  
Director of Planning and Community Development  
Town of Newmarket, New Hampshire

2025 Housing Supply Report  
January 22, 2026 PLAN Webinar

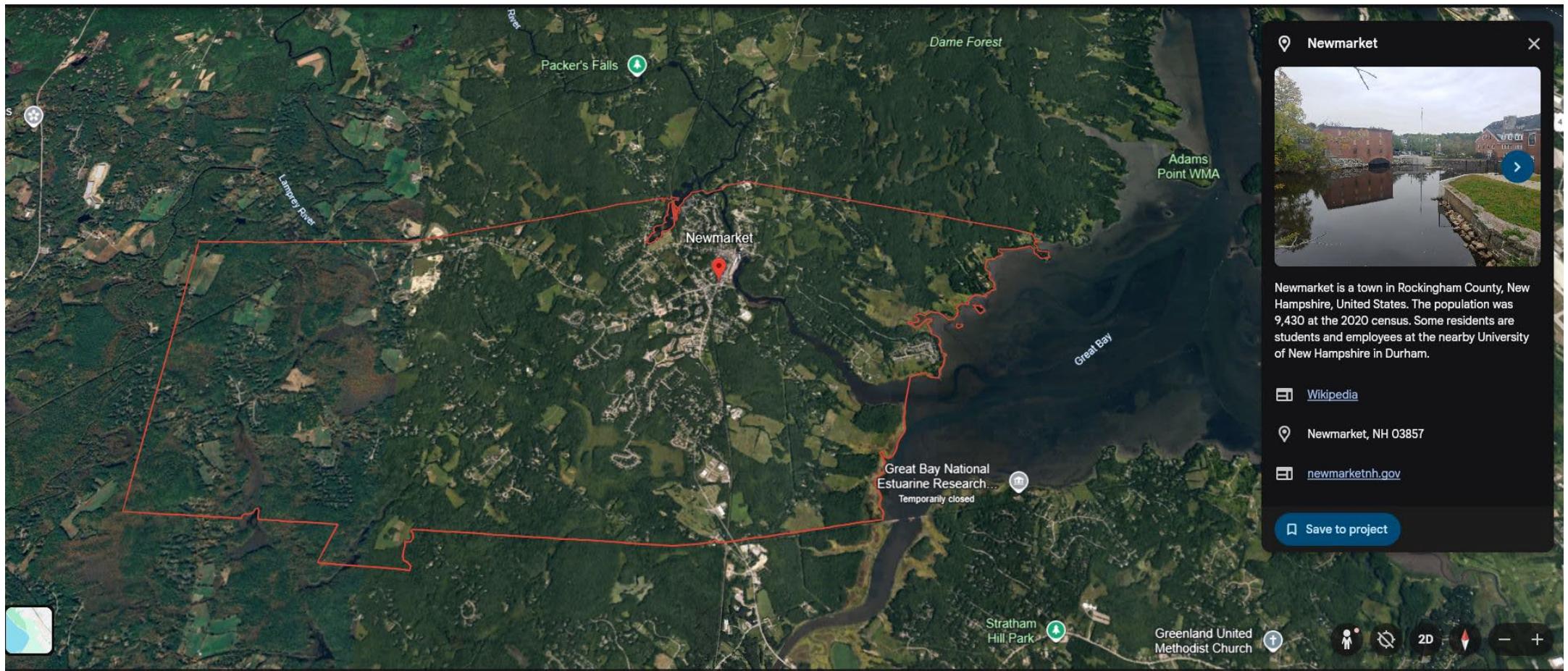
# OVERVIEW

- Existing Conditions
- History (1990-2025)
- Housing Opportunity Grant Program (1.0 & 2.0)

# EXISTING CONDITIONS

- Geographic
- Demographic
- Housing

# GEOGRAPHIC CONTEXT



# DEMOGRAPHIC CONTEXT

- Total Population (Census, 2020):
  - **9,400**
- Median Age (ACS, 2022):
  - **38.5 years**
- Total School Enrollment (NESDEC, 2024):
  - **958 students**
- Income, Household (ACS, 2022):
  - **Owner- \$127,256 | Renter- \$62,998**

# HOUSING CONTEXT

- **Housing Stock (Number of Units in Structure, ACS, 2022)**

- 1 Unit: 2,470
- 2 Units: 247
- 3-9 Units: 495
- 10-49 Units: 903
- 50+ Units: 235
- Total: 4,350 Units

- **Housing Construction (TON Building Permits, 2024-2025):**

- 77 Apartments
- 5 SF Dwellings
- 5 ADUs

- **Housing Needs (RHNA, 2024)**

- 756 units by 2040 to have a balanced housing market
  - 506 owner-occupied; and
  - 249 rental units

# HISTORICAL CONTEXT

- 1990s
- 2000-2010
- 2010-2020
- 2020-2025

## ACTIONS IN THE 1990'S

- Rivermoor Landing is converted into apartments -77 Units- (Early 90s)
- Newmarket Community Development Corporation (NCDC) Purchase of the Newmarket Mills (1997)
- Downtown TIF district established for downtown redevelopment

## ACTIONS BETWEEN 2000 - 2010

- Newmarket Tomorrow Committee Established (2000)
- NCDC sold a portion of the Mills Complex to Chinburg Developers for Redevelopment [Bryant Rock] (2001)
- Master Plan to Reconstruct Main St. (Rt. 108) developed (2002); Construction Completed (2010)
- Water and Sewer Infrastructure Improvements / Expansions (2005)
- 79-E district Established and New Zoning Established for Mill Properties (2006 – 2009)
- Chinburg Developers Selected For Mill Redevelopment (2009)

## ACTIONS BETWEEN 2010 – 2020

- Mill Redevelopment Development Completed (2012-2015)
  - 112 Residential Units
  - 16 Live / Work lofts
  - 30,000 sf of commercial space
  - 5,400 sf of civic space
  - 9,600 sf retail center (across street)
- Macallen Dam Improvements (2020)
- Results:
  - 30 years of investments, policies and planning initiatives yielded vibrant development and more housing opportunities in the downtown.

## ACTIONS BETWEEN 2020-2025

- Gateway Study
- ADU Amendments
- Impact Fee Changes
- Stormwater Regulation Amendments
- Site Plan / Subdivision Updates
- Village Corridor District, Form Base Code
- Master Plan Update (on-going)

# HOUSING OPPORTUNITY PLANNING GRANT PROGRAM (HOP)

- Phase 1 (Purpose, process and outcomes)
- Phase 2 (Purpose, process and current status)

# HOP GRANT: PHASE I

## ■ Purpose

- Update the Town's Housing Master Plan Chapter
- Expand the downtown environment by developing regulations that rhyme with existing building patterns via a form-based code.
- Bring in property owners to help develop the zoning and to understand their aspirations and concerns from a land use perspective.

# HOP GRANT: PHASE I

## ▪ Consultants

- Strafford Regional Planning Commission; and
- Ivy Vann | Town Planning and Urban Design

## ▪ Process

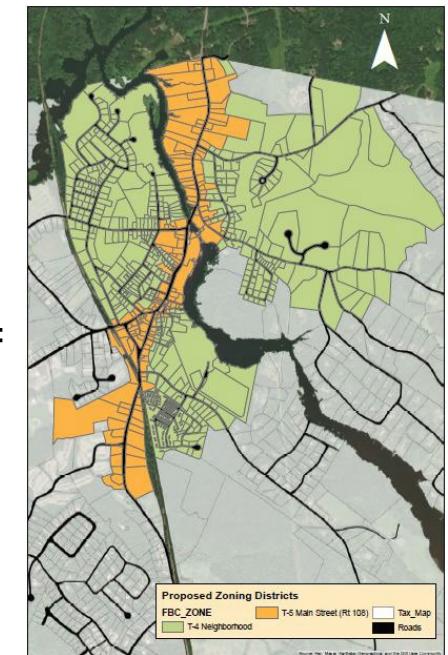
- Town-Wide Survey & Master Plan Visioning Sessions
- Focus Groups (Mill Space Venue)
  - Building Type Identification
  - Building Placement Exercise
- Regulation Development
  - Two zoning districts, and 14 Building types
- Report and Review
  - Final Recommendations, Zoning (July, 2024)
  - Draft Master Plan Chapter
- Planning Board Review and Approach
  - 9 Months of Review and Discussion (zoning amendments)
  - Village Corridor (VC) Zoning District Exclusively Developed, zoning standards for the surrounding neighborhoods to be developed in 2026



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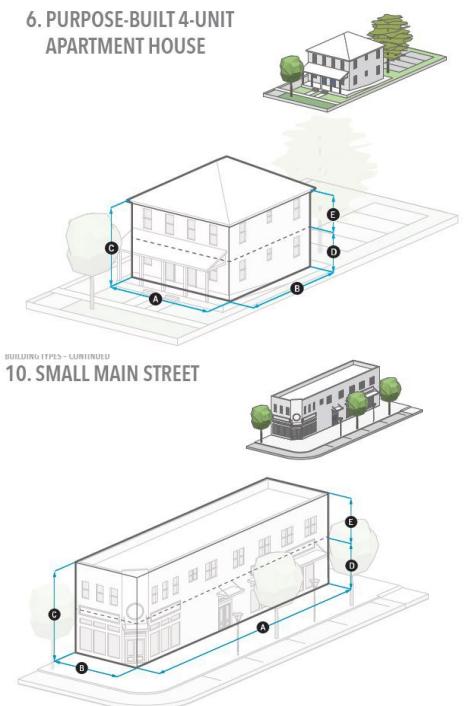
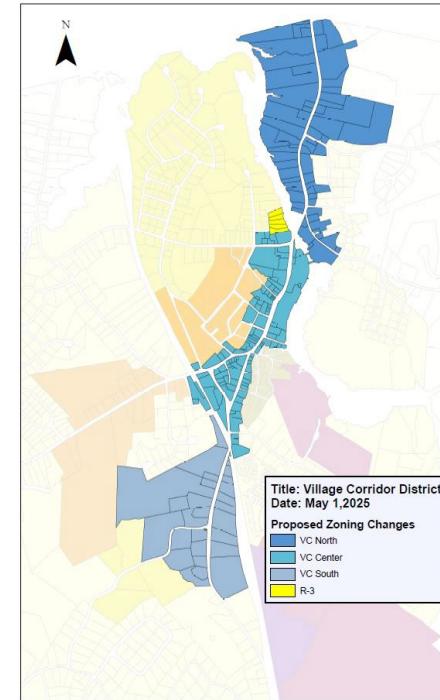


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# HOP GRANT: PHASE I

- **Outcome**
  - 3 Sub districts within the VC Zone.
    - Dimensional Control Relaxation
    - Special Use Permit Flexibility
    - Focus on Building Types and Placemaking for Larger Developments
  - Town Council Action in June, 2025
- **Projects**
  - 4 Known Applications Currently Under Design to be Presented to the Planning Board in 2026
- **Current status of Regulation Development**
  - Planning Board Reviewing, Discussing and Amending the Village Residential District (Still workshopping the name)



# HOP GRANT: PHASE II

## ■ Purpose

- Continue to understand the community's land use needs and accordingly develop recommended regulations.
- Seek to understand the attributes valued and challenges experienced by respective neighborhoods throughout town.
- Identify building types appropriate for different neighborhoods.

## ■ Process

- Similar to HOP I in collecting qualitative data.

## ■ Current Status

- Developing first-round of recommendations and reaching back out to the community for comment.



# THANK YOU FOR YOUR TIME! ANY QUESTIONS?

Contact Information:

Bart McDonough

Director of Planning and Community Development

Town of Newmarket, New Hampshire

Email: [bmcdonough@newmarketnh.gov](mailto:bmcdonough@newmarketnh.gov)

Phone: 603.695.8501 ex. 1315

# Contact Info and Links

- [NH State Data Center: Housing and Household Data](#)
  - *Current Estimates and Trends in New Hampshire's Housing Supply – 2025 Update*
  - Source data for report
  - Maps of Housing Units Permitted in 2024 by state, counties, regions, and municipalities
- **Ken Gallager, Principal Planner, NH Office of Planning and Development**
  - [kenneth.r.gallager@livefree.nh.gov](mailto:kenneth.r.gallager@livefree.nh.gov)
  - (603) 271-1773
- **Bart McDonough, Director of Planning and Community Development, Town of Newmarket**
  - [bmcdonough@newmarketnh.gov](mailto:bmcdonough@newmarketnh.gov)
  - (603) 695-8501 ex. 1315

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Schedule for 2026 upcoming webinars

**A short, anonymous online feedback survey**

# THANK YOU