



# 2045 HOUSING PRODUCTION TARGET

Planning Commission briefing  
June 10, 2025

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Economic Planner

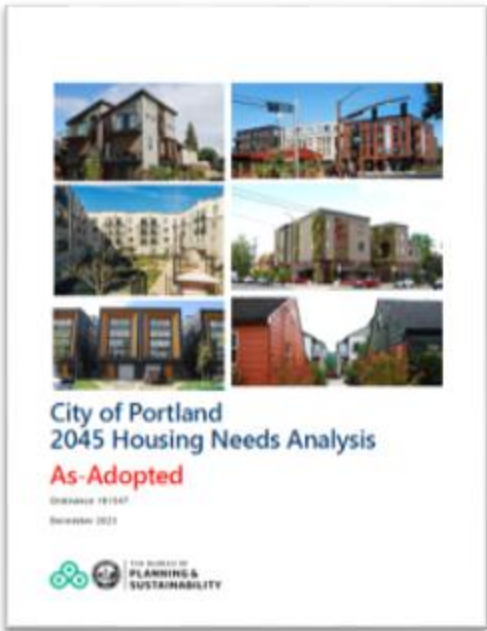
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Supervising Planner



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# Several policies play a role in determining Portland's share of regional growth

## 2023 Portland Housing Needs Analysis (HNA)



## 2024 Metro Urban Growth Report

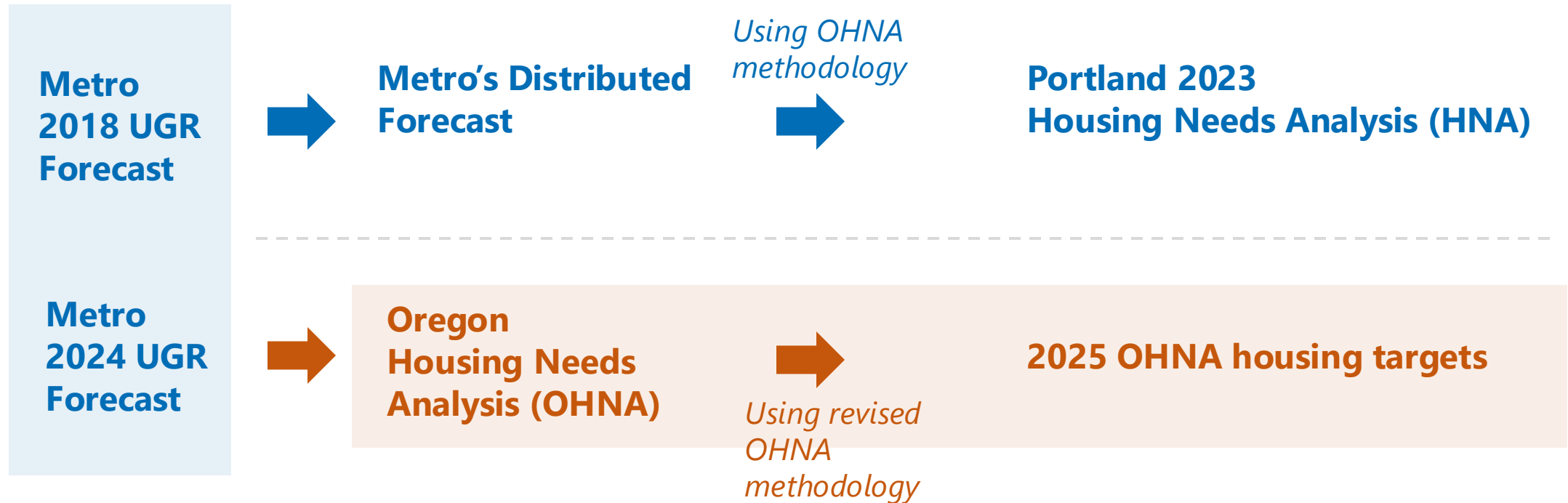


## 2025 Oregon Housing Needs Analysis (OHNA)



# How Portland determines future housing production targets is changing

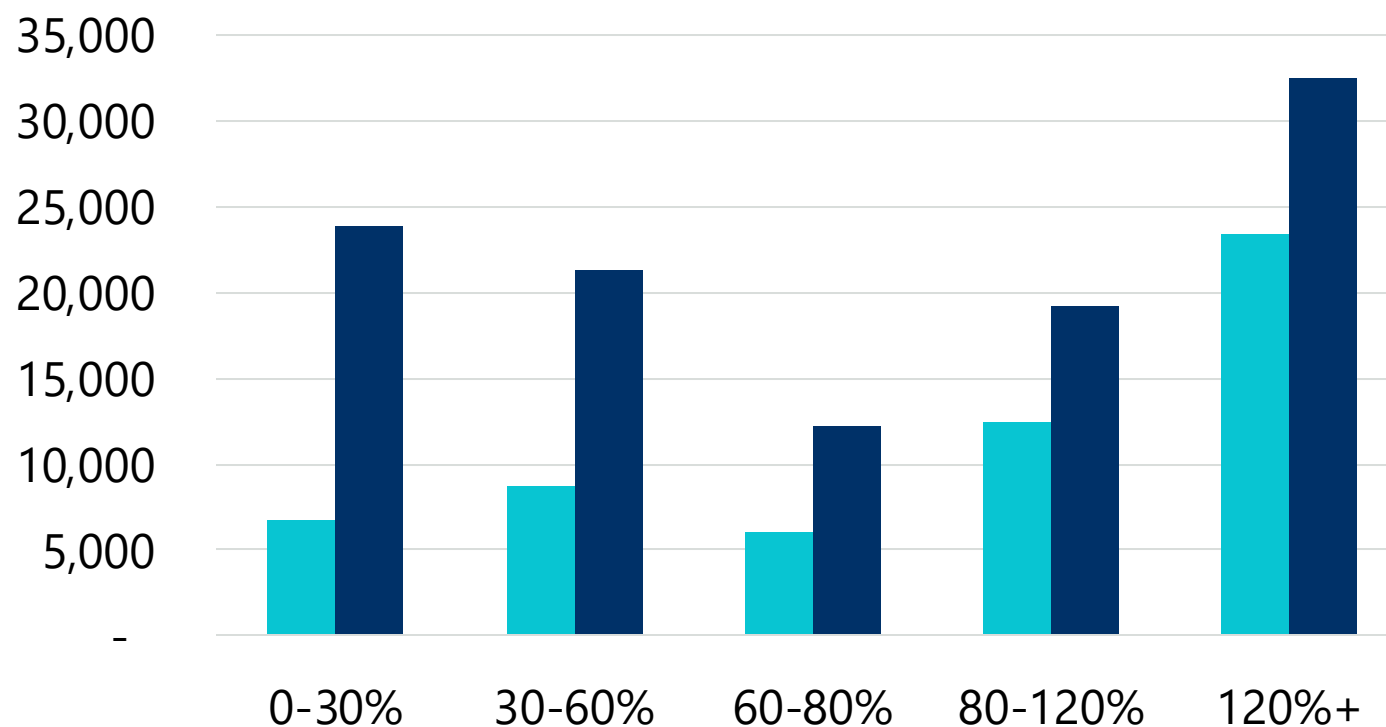
As of 2025, the State's Department of Administrative Services (DAS) is now responsible for estimating 20-year housing production targets **annually** for the state, metro region, and individual cities and counties.



# OHNA target is nearly half the Portland HNA forecast

2045 DAS Target: 57,406

2045 HNA Remaining Target: 109,346



# Oregon Housing Needs Analysis (OHNA)

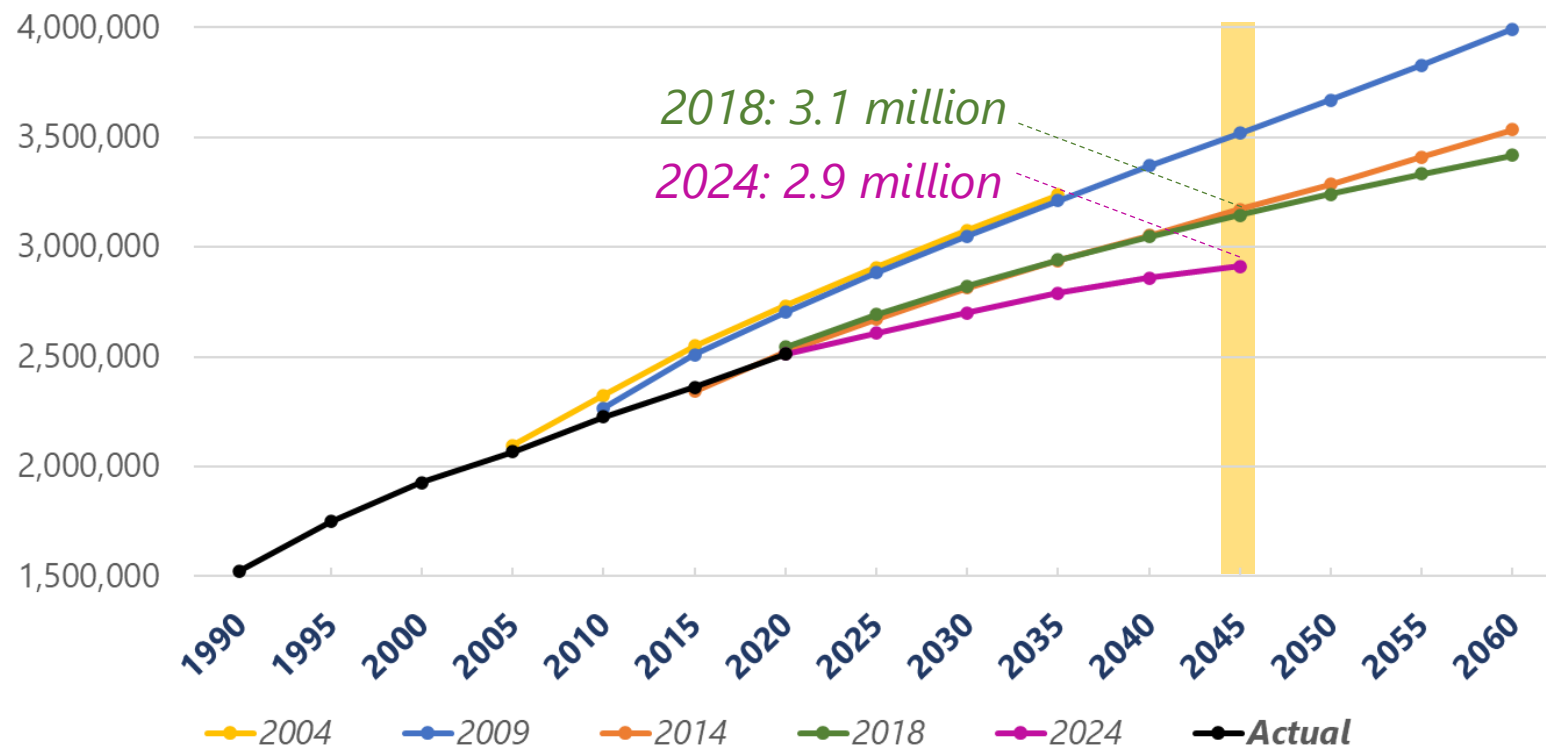
## 2045 Target Assumptions

*Why is the OHNA target lower?*

- Metro's 2024 regional forecast is 33% lower than 2018 forecast.
- OHNA allocates the regional forecast to each city in the region based on a range of factors:
  - Development capacity
  - Recent housing production
  - Access to jobs
  - Affordable housing production
  - Fair share allocation

# Metro's 2024 forecast projects 235,000 fewer people by 2045 compared to 2018 forecast

Urban Growth Report Baseline Population Regional Forecasts for 7-County Metropolitan Statistical Area (MSA)



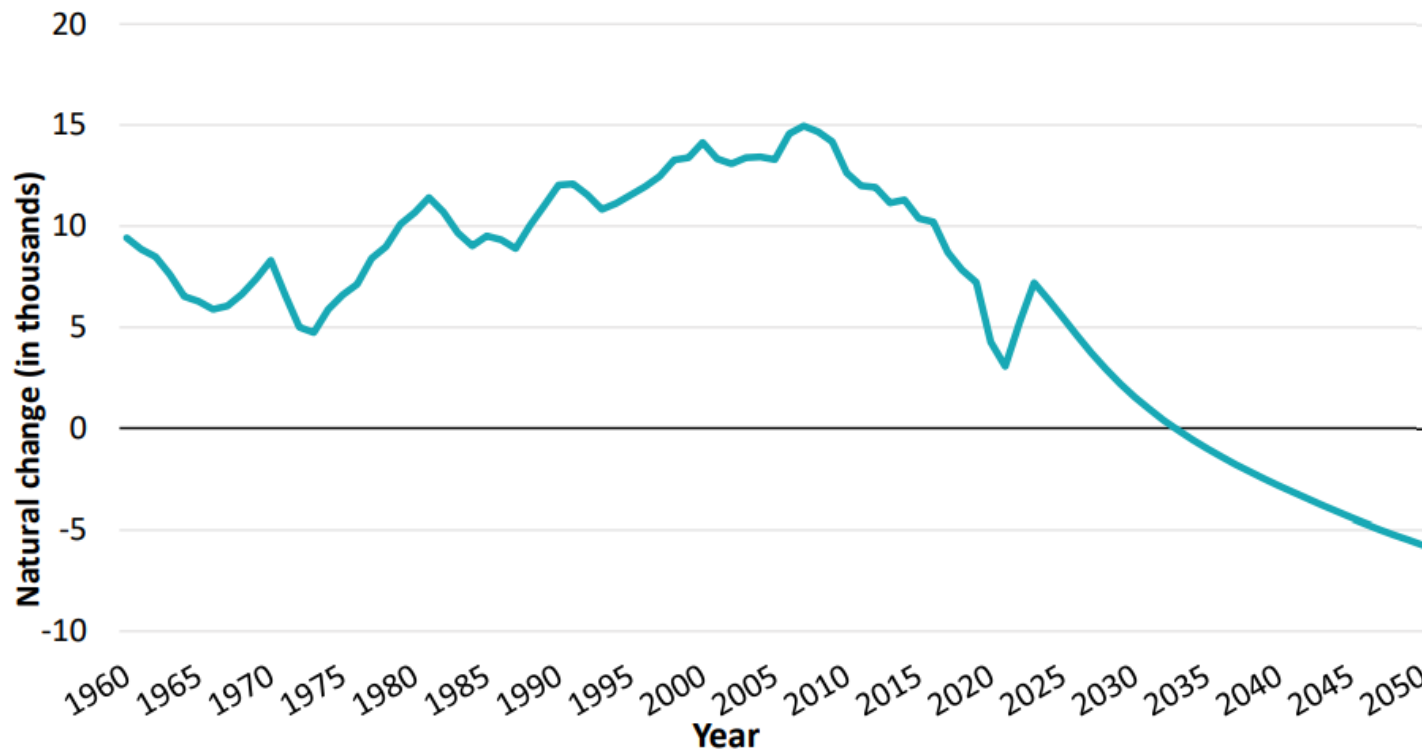
Source: Metro's Urban Growth Reports



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# The number of deaths is expected to exceed the number of births by 2035

MSA Natural Change (Births minus Deaths)



Source: Metro's Urban Growth Reports



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# The biggest difference is for deeply affordable units

## Comparing 2045 Housing Need by Income Level for Portland HNA & OHNA

	PORTLAND HNA	State OHNA for Portland
	% of total	% of total
0-30% AMI	41%	27%
30-60% AMI		
60-80% AMI	11%	11%
80-120% AMI	18%	22%
>120% AMI	30%	41%
<b>Total Units</b>	<b>109,346</b>	<b>57,406</b>
<b>Annual Target</b>	<b>5,400</b>	<b>2,800</b>



# Cities with lower-than-average affordable housing production are allocated higher low-income targets

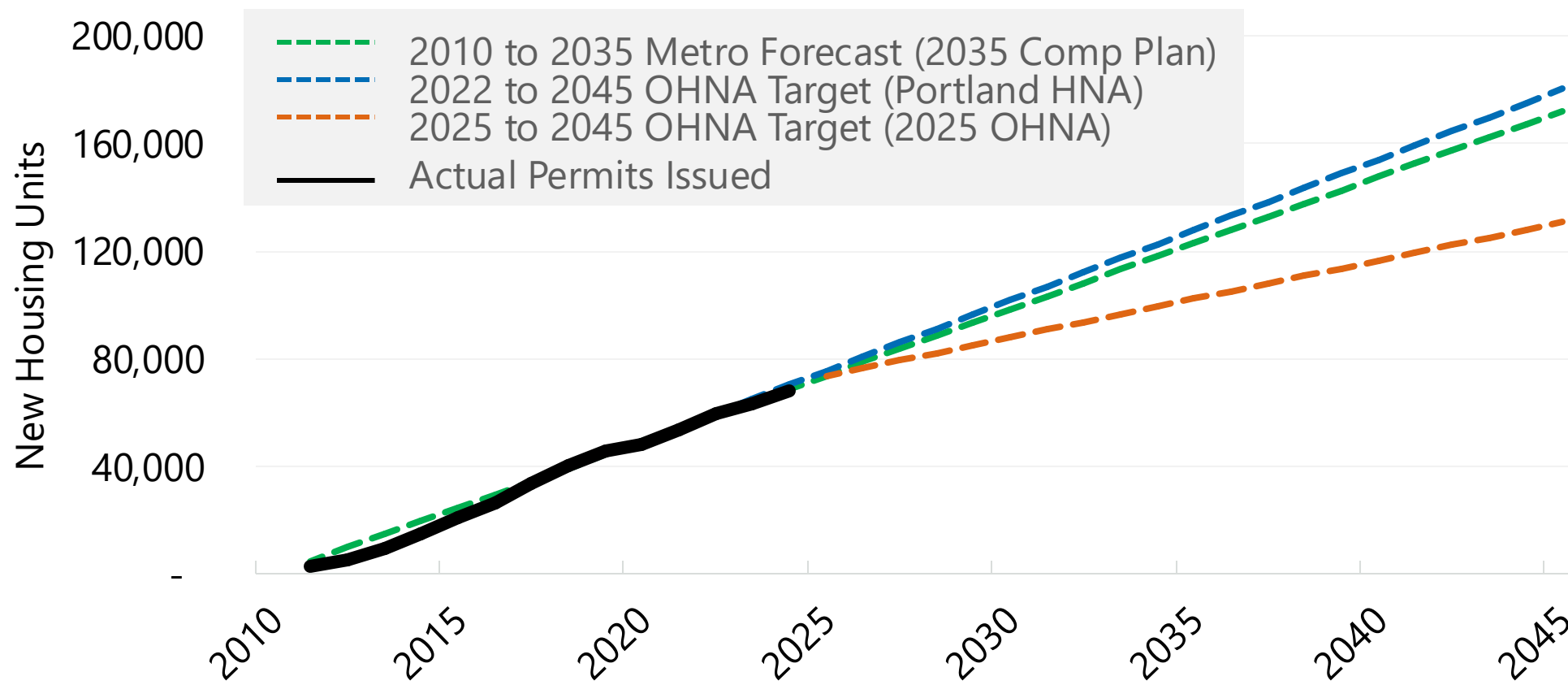
Share of Total Housing Need Changes for Affordable Units (0 – 80% AMI)

	CITY HNA	State OHNA	<i>Difference</i>
PORTLAND	53%	37%	<b>-15%</b>
TIGARD	37%	43%	<b>6%</b>
BEAVERTON	32%	45%	<b>13%</b>
LAKE OSWEGO	35%	52%	<b>17%</b>
WEST LINN	33%	62%	<b>29%</b>

Source: 2025 DAS Oregon Housing Needs Analysis 20-Year Housing Allocations, 2023 Portland Housing Needs Analysis, 2023 Beaverton Housing Needs Analysis, 2021 Tigard Housing Needs Analysis, Lake Oswego Housing Needs Analysis, 2021 West Linn Housing Needs Analysis

# 2025 OHNA targets notably depart from targets estimated in previous growth forecasts

Comparing Portland housing unit forecasts



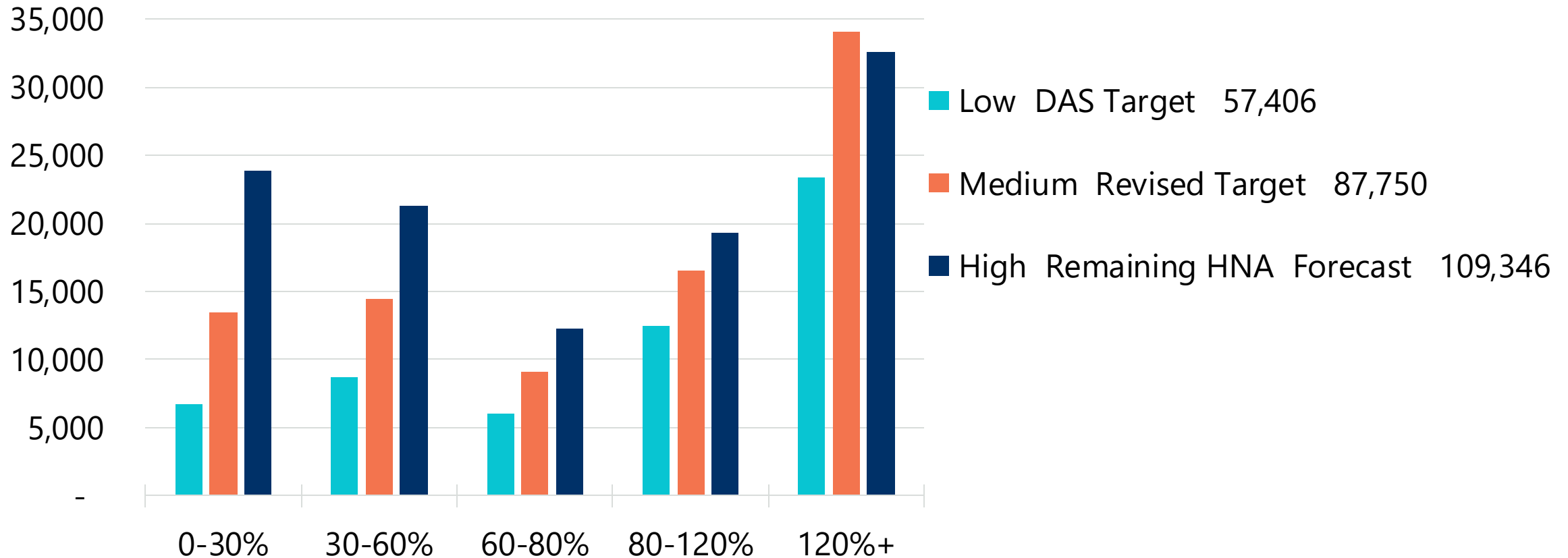
# Revised Portland 2045 Target

## *Policy Objectives and Input Considerations*

- The revised Portland housing target addresses:
  - OHNA allocation
  - Additional housing to house Portland's houseless population
  - Additional housing to address current lower income Portlanders that are severely cost burdened renters (more than 50% of income on rent)
  - Potential double-counting with OHNA and adjustment factors
  - City's current economic diversity

# Revised 2025-2045 Target: 87,750

*Probably somewhere in the middle*



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*Probably somewhere in the middle*

Income Level	Low DAS	Medium Revised	High Remaining Adopted HNA
0-80%	21,666	37,077	57,507
	37%	42%	53%
80-120%	12,484	16,571	19,276
	22%	19%	18%
120%+	23,576	34,103	32,563
	41%	39%	30%
Total	57,406	87,750	109,346



# Revised 2045 Target

Total units:

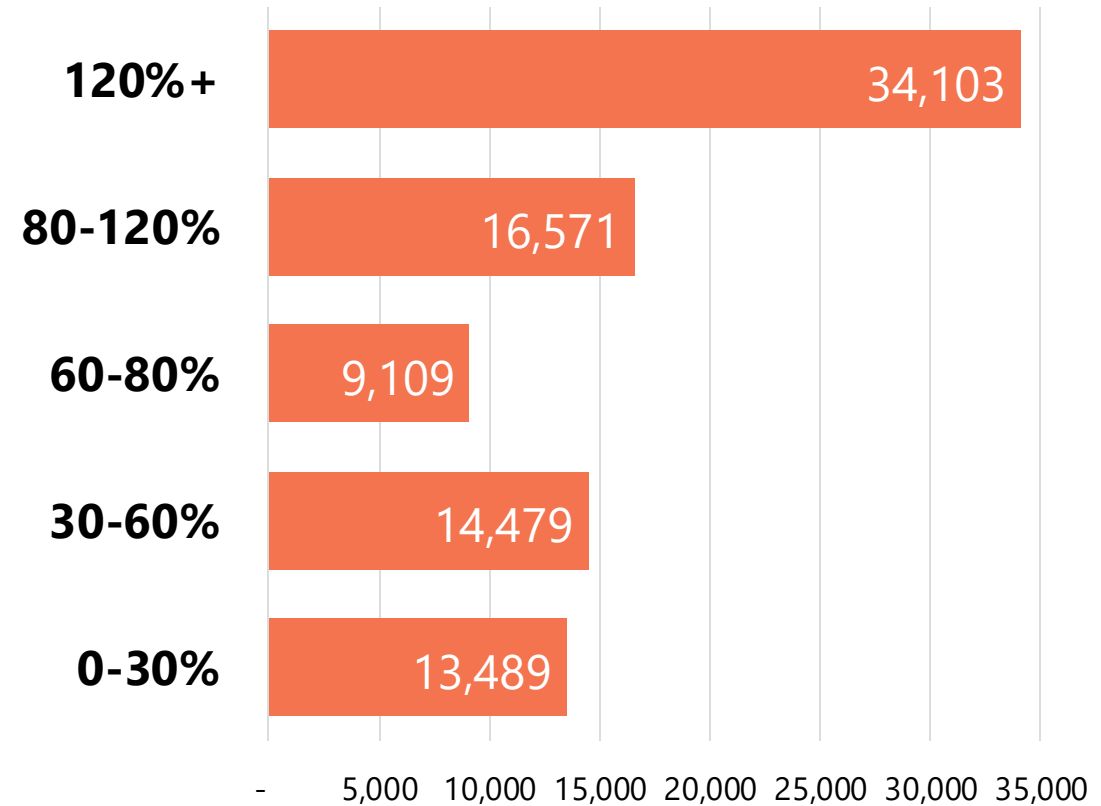
*87,750 units*

Annual production target:

*4,400 units*

Lower income need:

*37,080 units*



% AMI	Single Adult	2-Person Household	4-Person Household	Target
120% +	\$104K +	119K +	149K +	34,103
80-120%	\$69 - 104K	79 - 119K	99 - 149K	16,571
60-80%	\$56 - 69K	60 - 79K	75 - 99K	9,109
30-60%	\$26 - 52K	29 - 60K	37 - 75K	14,479
0-30%	\$0 - 26K	0 - 29K	0 - 37K	13,489

- 5,000 10,000 15,000 20,000 25,000 30,000 35,000



## Next Steps

- Continue to consult with PHB and City partners







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