

CHATHAM COUNTY SCHOOLS
468 RENAISSANCE DR
PITTSBORO, NC 27312

INTEGRATED PLANNING FOR SCHOOL AND COMMUNITY
(IPSAC)

2024 LAND USE STUDY FINAL REPORT

PREPARED AND SUBMITTED BY
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Executive Summary

In the fall of 2024, the Chatham County Schools Board of Education commissioned the Operations Research and Education Lab (OREd), based at the Institute for Transportation Research and Education (ITRE) at North Carolina State University, to evaluate the residential, commercial, and industrial developments approved within Chatham County. Through evaluation of the supplied development inventories and municipal and county stakeholders, OREd will construct a student growth projection model accounting for development and buildout time periods.

Land Use Study | Chatham County

In December of 2024, OREd met with community leaders and planning officials from Chatham County and its towns to discuss long-term factors which may influence district enrollment in Chatham County. The population growth across the county is attributable to the area's high quality of life, robust local economy, as well as its proximity to other job centers such as those in Raleigh, Durham, and Chapel Hill (referred to as the "Research Triangle").

The near-term development potential of Chatham County is significant. Census numbers show that over the past decade, Chatham County has been experiencing a strong growth in population numbers. Indeed, with its central location, proximity to the Research Triangle, and thousands of forthcoming new jobs, Chatham County is one of the fastest growing counties in North Carolina. Currently in December 2024, and in addition to Chatham Park, there are at least 51 developments that contain approximately 10,650 proposed or approved lots/units that are expected to be completed and built-out by at least 2035. This development potential aligns with Chatham County's suburban history. Furthermore, the Chatham County Land Use Study tells a compelling story of growth, underscoring that the future of Chatham County lies in capitalizing upon the area's strengths: modern industries, close-knit communities, and partnerships with the Research Triangle region.

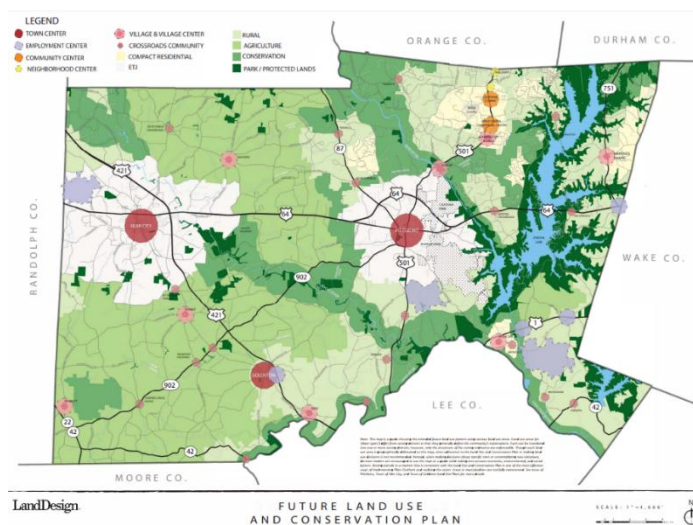


Figure 1: Chatham County Future Land Use and Conservation Map
Source: Chatham County Comprehensive Plan (2017)

Overview

School systems nationwide are facing difficult planning challenges due to fluctuating student populations and aging school infrastructure. These challenges are shared by the communities that fund building and renovation projects. The Operations Research and Education Laboratory (ORED) has developed a system of Integrated Planning for School and Community (IPSAC) that uniquely integrates community and regional data, ten-year economic and demographic forecasts, demographic and land use studies, digitized pupil and school location files, and mathematical optimization algorithms.

The integrated planning system is comprised of multiple data-driven processes including:

- Enrollment Forecasting
- Land Use Study
- Out-Of-Capacity Analysis
- School Location Optimization Scenarios
- Attendance Boundary Optimization and Redistricting

This report documents findings from the Chatham County Land Use Study. The Land Use Study outlined in this report includes two components: Community Interviews and Geographic Information Systems (GIS) analysis.

Community Interviews

Discussions with planners, town administrators, utility works, economic development officials, and transportation professionals, etc. allow ORED to compose an impression of future growth for the study area. These critical interviews engage the community to participate in the articulation of infrastructure development plans (transportation, water and sewer), recent subdivision permits, residential zonings, land available for development, and comprehensive plans developed by local government agencies.

GIS Analysis

ORED also performs spatial analyses based on GIS parcel data using state-of-the-art ArcGIS software. This GIS analysis provides quantitative data concerning available parcels and subdivision lots that then can be used to identify areas of future growth. Student demographic analysis can also be conducted at this stage to better understand socio-economic compositions that may influence school assignment decisions.

Through the combination of community interviews and data-intensive GIS analysis, ORED is able to forecast school population growth at the individual school attendance boundary level. The culminating deliverable of this analysis is the Capacity worksheet, which projects school membership over a ten-year period.

Introduction

The Land Use Study draws this information together through a selection of key informants, community stakeholders, and planning officials that were interviewed in the winter of 2024. Additional information was gathered through conference calls, emails, public planning documents, and demographic information provided by the United States Census Bureau.

This report is organized in a comprehensive topical framework that depicts an overall snapshot of growth within the county. This includes both new land uses (developments) and economic generating activities, such as transportation and infrastructure investments. The development of residential land alongside commercial and industrial predicts areas of growth within the county that are likely to experience change in the years to come.

History

Chatham County lies in the rolling hills of central North Carolina, within and along the edge of the Piedmont plateau. The area around present-day Chatham County was originally inhabited by the Iroquoian and Siouan speaking Indians (Mazzocchi, 2006). Beginning in the mid-1700s, European settlers began arriving in greater numbers, and in 1771, Chatham County was officially formed. The new county was named for William Pitt, the first Earl of Chatham, a British Prime Minister who opposed harsh colonial policies.

For much of Chatham County's history, the region was largely characterized by rural agricultural and forestry communities. Major farm products grown in Chatham County included tobacco, corn, soybeans, hay, pigs, poultry, and cattle. Furthermore, the area's bountiful terrain supported early manufacturing enterprises in textiles, lumber, and furniture. In addition, the discovery of viable bituminous coal deposits in the 1800s—the only known source in the state—led to the formation of the coal mining communities of Carbonton and Cumnock (Fletcher, 2005).

The 20th century brought more changes to Chatham County. As the Research Triangle region grew into a major metropolitan area, in 1963 the U.S. Army Corps of Engineers authorized the New Hope Lake Project, which initiated the construction of a large reservoir along the Haw River and New Hope Creek in eastern Chatham County. Completed in 1974, the man-made body of water was named for Senator B. Everett Jordan and today serves a major water supply for the entire central North Carolina region, as well as a popular recreation destination.

Chatham County has been shaped by its dynamic legacy of growth and development. From the bustling downtown of Pittsboro to the forests and fields along the Deep River, and from the suburban homes of Cary to the crossroads of Silk Hope, Chatham County has prospered due to its geography, economy, and community.

Today

Today, Chatham County is a dynamic mix of charming towns, suburban neighborhoods, productive farms, and state-of-the-art industries. Agriculture and forestry remain an important part of the area's economy. Meanwhile, the county has found tremendous success in attracting new and large-scale industrial enterprises (detailed in later sections). The downtowns of Pittsboro and Siler City continue to support new and existing shops and restaurants, and new businesses are being created across the county every year.

Chatham County boasts beautiful landscapes, recreational rivers and lakes, and an advantageous proximity to Raleigh, Durham, and Chapel Hill. As such a desirable place to live, Chatham County appeals to longtime residents and new families alike. This situation is perhaps best exemplified by Chatham Park, a large-scale mastered planned community spanning 8,500 acres in Pittsboro that will continue to be built into the next decade. Indeed, the pace of growth in Chatham County has been unprecedented—with thousands of new jobs and homes still on the near horizon.

Population levels have been rapidly growing in Chatham County. According to US Census data, between 2017 and 2023, the county's population increased by 14.6%. Even still, these numbers do not account for the yet-to-be-built residential developments that have been approved in recent years, with many new neighborhoods still waiting on forthcoming sewer improvements to begin construction. People are flocking to Chatham County for its amenities, good-paying jobs, and quality of life. Furthermore, as a part of the Research Triangle region, Chatham County residents can still take advantage of employment opportunities in Wake, Orange, or Durham counties. Currently, about 81.0% of Chatham County's employed population work outside of the county (Census OnTheMap). With its convenient highway network into the heart of the Research Triangle, Chatham County is ideally situated for workers to commute to a variety of job centers and universities.

The Land Use Interview

The Land Use Study is comprised of interviews with local practitioners and stakeholders that can help contextualize the quantitative data available to the OREd lab staff. Moreover, while OREd's capabilities with historic/archived school enrollment data have been consistently precise in their estimations over the past twenty years, future-oriented information is critical to ensuring the accuracy of the school enrollment projections. This can only be achieved through conversations with local practitioners and stakeholders.

Strategic Purpose and Goal of Land Use Studies

The purpose of the land use interviews is to gain a better understanding of what development (residential, commercial, industrial and economic) is taking place in December 2024, as well as residential and commercial developments that are either expected or planned to occur in the near future (one to ten years).

Questions included in the Land Use Study interviews that are relevant to school enrollment and planning projections are below:

With regard to residential development:

- Can you share the locations of new or upcoming subdivisions?
- Are these developments scattered throughout the school district or concentrated?
- What is the pace of residential development?
- Has that number been increasing, and if so, at what rate?
- Is that number expected to increase, and if so, at what rate?

With regard to commercial and industrial development:

- Have any new major employers recently opened a facility in the school district?
- Are any new employment facilities that would bring new families to the area expected to open in the next year or so?

The tables on the following page outline the direction that is taken with the key informant interviews. *Figure 2* outlines the concepts and ideas OREd wishes to discuss with interviewees, as well as anticipated results and materials. *Figure 3* is a list of names and affiliations of OREd's interviewees.

Interview Topics	Anticipated Materials & Results
County and City/Town Planning Department(s)	
Residential, industrial and commercial development in progress and/or planned for the future	<ul style="list-style-type: none">• Zoning ordinance• Comprehensive plan• Summary of subdivision permits
Development trends	
Status of development currently in progress (% of approved units that are now built, by subdivision)	
Price range of units in subdivisions currently under development)	
Mobile home parks	
Building moratoria in existence or planned	
Impact fees (if any)	
Economic Development Commission	
Industrial and commercial development in progress and/or planned for the future	<ul style="list-style-type: none">• County/local municipal economic development information• Largest employers• Employers that have recently located to/moved from the county, etc.
Economic bases of the county/city	
Development trends and locations	
Economic development policies	
Employment trends	
Infrastructure available/required for future needs	
Water / Sewer / Electric / Other Utilities	
Current location of water/sewer, and utility lines	<ul style="list-style-type: none">• Maps of current water/sewer, and other utility lines
Current capacities of water and sewer treatment plants and planned expansions	
NCDOT:	
Planned highway expansion/construction in the county, and information on other transportation modes as appropriate	<ul style="list-style-type: none">• Current and anticipated STIP projects, projects not included in the STIP that NCDOT believes are high priorities for action

Figure 2: List of Anticipated Results

	Name	Title
County Leadership and Planning		
Chatham County	Jason Sullivan	Planning Director
	Chance Mullis	Assistant Planning Director
	Hunter Glenn	Planner II /(Goldston)
Municipal Leadership and Planning		
Town of Pittsboro	Randy Cahoon-Tingle	Planning Director
Town of Siler City	Timothy Mack	Director of Planning & Community Development
Town of Cary	Maika Arnold	Senior Planner
Town of Cary	Justin Oliver	GIS Specialist
Community Stakeholders		
Central Pines Rural Planning Organization	Karyl Fuller	Principal Planner / RPO Director
Capital Area Metropolitan Planning Organization (CAMPO)	Gerald Daniel	Transportation Modeling Engineer
Chatham County Economic Development Corporation	Michael Smith	President
TriRiver Water	Nick Fortune	Civil Engineer – Asset Manager
Preston Development – Chatham Park	Vanessa Jenkins	Senior Executive Vice President
Preston Development – Chatham Park	Chuck Smith	Vice President of Planning

Figure 3: List of Interviewees

Key Demographic Trend and Status Indicators

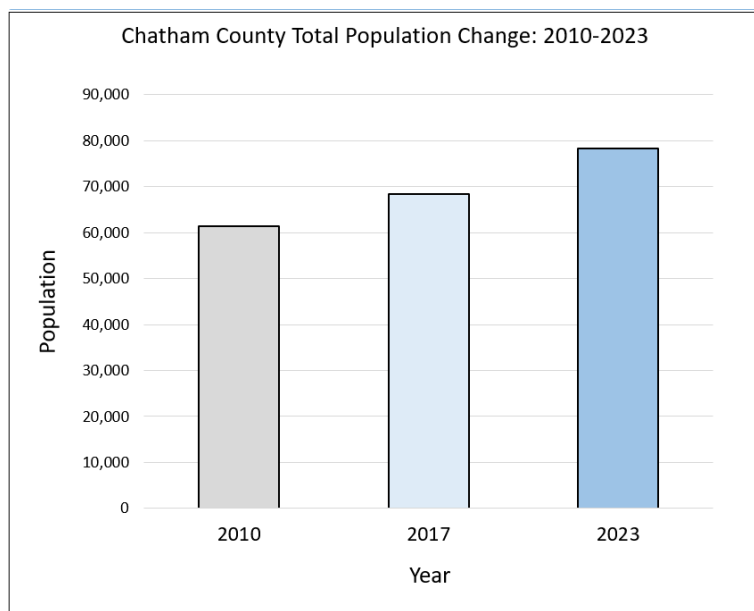


Figure 4: Chatham County Total Population Change

According to 2023 American Community Survey estimates, the population of Chatham County is 78,319. Previously, the population of Chatham County increased 11.3% from the 2010 census to the 2017 ACS. From 2017 to 2023, the county saw a further population increase of 14.6%. As seen in *Figure 4*, the entire county's population has been steadily growing since 2010 (U.S. Census Bureau). This is a common trend across counties in the Research Triangle region. With a central location, significant local industries, and convenient major highways to Chapel Hill, Durham, and Raleigh,

people are consistently moving to Chatham County in search of housing, employment opportunities, and a higher quality of life.

Age

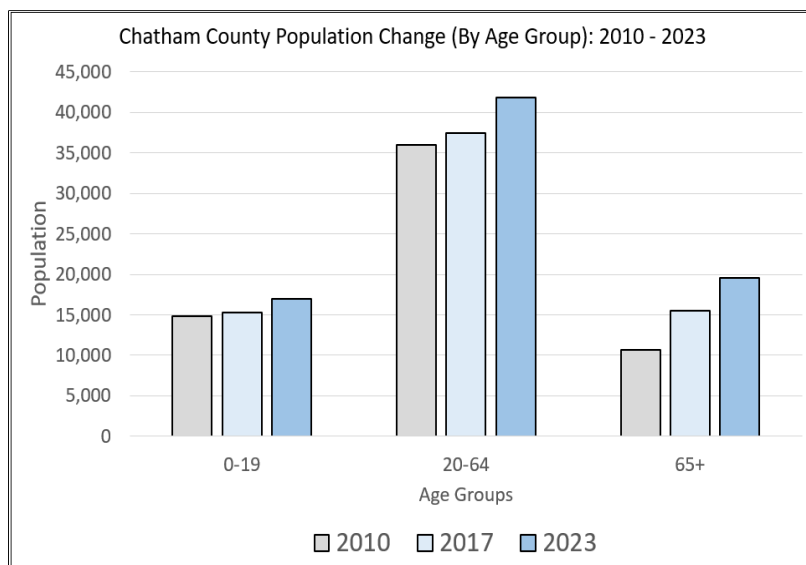


Figure 5: Chatham County Population Change By Age Group

Chatham County's population appears to be greying as older age groups (65 & Older) have been on the rise since 2010. From 2010 to 2023, the portion of the population close to retirement grew by 83.1% (U.S. Census Bureau, American Community Survey). Meanwhile, the 20-64 age group saw a nearly 16.4% increase from 2010 to 2023 (U.S. Census Bureau, American Community Survey). Furthermore, younger generations have also been increasing. The population of children in Chatham County has steadily grown, as the number of

school-aged kids rose 3.8% between 2010 and 2017, and then increased 10.3% further between 2017 and 2023. (U.S. Census Bureau, American Community Survey).

Race and Ethnicity

For comparison purposes, the OREd lab analyzed Chatham County's demographic numbers next to two other counties in North Carolina. Firstly, Franklin County was chosen for the comparison because it has similar population numbers and is also in the suburban Research Triangle area. Additionally, Wake County was included to see how Chatham County's demographic numbers compare to a more urbanized setting and to the home of the capital of North Carolina. As seen in *Figure 6*, Chatham County has comparable diversity rates to its Franklin County counterpart. Chatham County is comprised of 72.5% White populations, while Franklin is at 63.0% (U.S. Census Bureau, American Community Survey). However, Chatham County has a higher population of citizens reporting as Some Other race than Franklin County, with the communities reporting at 7.4 and 5.9%, respectively. Meanwhile, when comparing against Wake County's larger population, both Chatham and Franklin have fewer populations from different backgrounds.

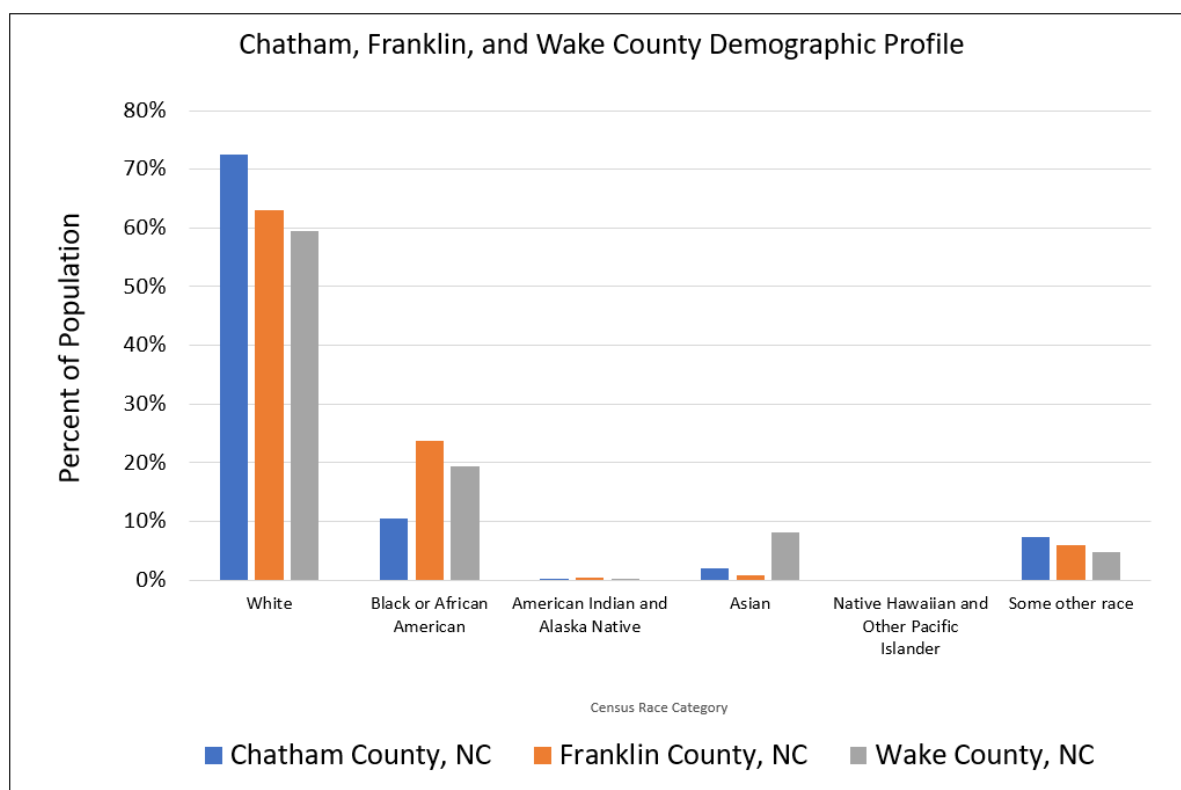


Figure 6: County-Level Demographic Profile Comparison

As expected, Chatham County’s diversity rates shift when its profile is compared to North Carolina and the United States. In regards to the portion of the population that Whites comprise, Chatham County (72.5%) is higher than North Carolina as a whole (62.4%) and the United States (68.2%). Correspondingly, Chatham County is lower than North Carolina with the African American population in this comparison. Chatham County is comprised of 10.5% African Americans while North Carolina and the United States are 20.1% and 12.6% respectively. Furthermore, the trend American Indian citizens is a similar demographic comparison. Chatham County holds the lowest percent of American Indians at 0.1%, followed by the United States at 0.8%, and with the North Carolina at 1.1%, as seen in *Figure 7* (U.S. Census Bureau).

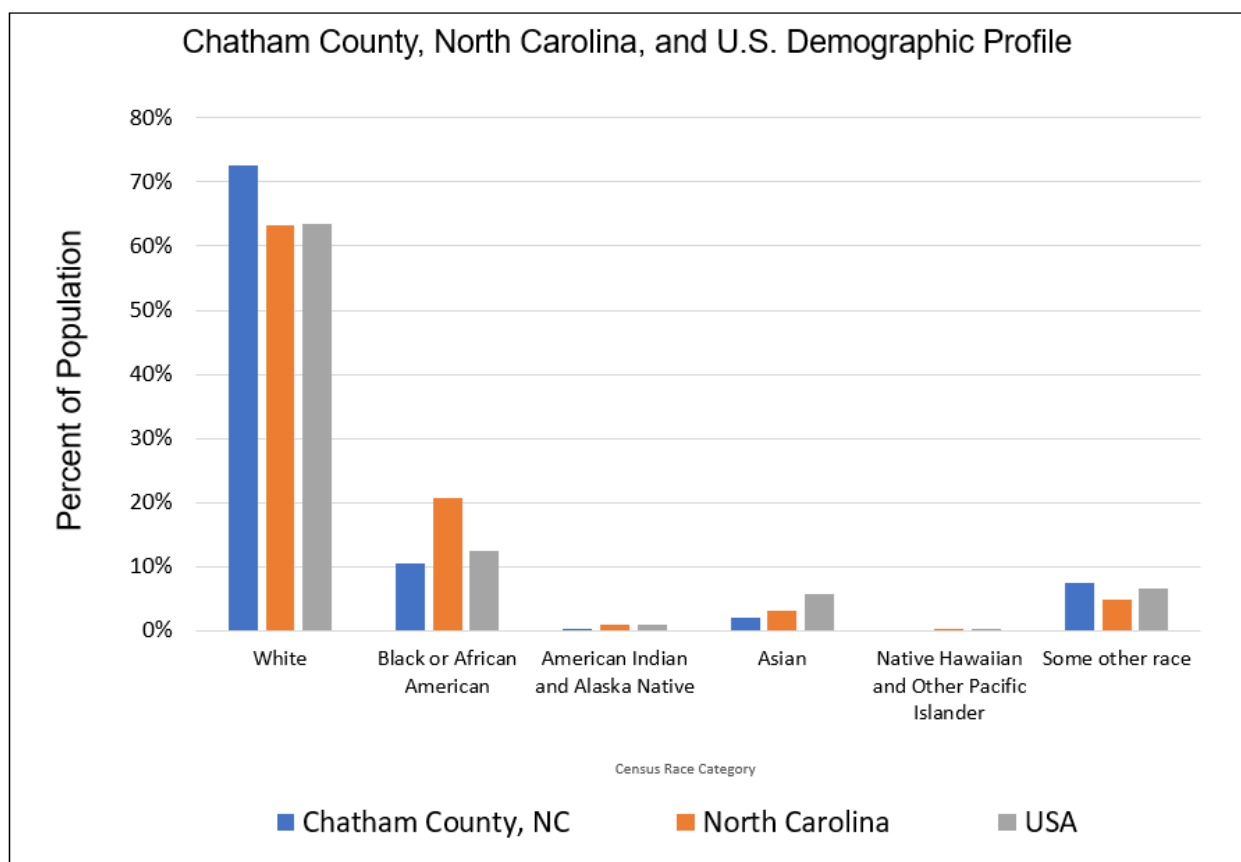


Figure 7: State & National Demographic Profile Comparison

In addition to the U.S. Census race categories, questions about ethnicity are used to gather information about individuals’ cultural heritage and origin. Respondents are asked to identify their ethnicity as either “Hispanic or Latino” or “Not Hispanic or Latino”, which is defined as a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race. This distinction is made because people who identify as Hispanic, Latino, or Spanish may be of any race. In Chatham County, approximately 13.4% of the population identifies as Hispanic or Latino—a growing part of the local community (U.S. Census Bureau).

Veterans

In 2017, 8.6% of Chatham County's population over the age of 18 were veterans of the U.S. Armed Forces. That estimate then decreased to 7.0% in 2023 (U.S. Census Bureau, American Community Survey).

Education

According to U.S. Census numbers, 48.0% of the population holds a bachelor's degree or higher (U.S. Census Bureau, American Community Survey). Chatham County is in general proximity to several notable colleges and universities in the Research Triangle, including the University of North Carolina at Chapel Hill, Duke University, and North Carolina State University. These regional opportunities for higher education can be appealing to prospective students and part-time commuters.

Chatham County is also home to the distinguished Central Carolina Community College (CCCC), a pillar of the regional community. Originally founded in 1961 as the Lee County Industrial Center, the school has grown over the years into a public two-year college that serves Chatham, Harnett, and Lee counties. Today, CCCC is a fully accredited, multi-campus community college with more than 130 degree, diploma and professional certificate programs. Central Carolina Community College's Chatham Main Campus is a 43-acre property with 60,000 square feet of floor space for classrooms, shops, offices, and laboratories. The Chatham Main Campus is the primary location for the college's sustainability programs, offering degrees in Sustainable Agriculture and Sustainability Technologies and certificates in Biofuels, Green Building, Renewable Energy, and Sustainability. Additionally, The Siler City Center opened in 2011 on 41 acres in the Central Carolina Business Campus. The 24,000-square-foot facility is LEED-certified and features innovative technology throughout. The building has classroom, office, medical, and vocational lab space used to teach Adult High School, GED, ESL, workforce development, medical certifications, and general college education.



Figure 8: Logo of Central Carolina Community College

With courses providing both hands-on training and online options, and with hybrid and traditional programs, CCCC makes education available to its community at an affordable rate. In addition, CCCC also serves high school students at Chatham Early College (CEC) and the Career & College Promise program (CCP). The CEC program allows students to earn both a high school diploma and an associate degree, free of charge, while CCP enables traditional high school students to take a variety of college courses during their junior and senior years (CEC, 2024).

Employment and Income

North Carolina Department of Commerce data reveal that as of August 2024, 3.6% (1,414) of the 38,763 people in the Chatham County labor force were unemployed. Compared to North Carolina's 4.3% unemployment rate, Chatham County has better labor conditions than the state (Local Area Unemployment Statistics). U.S. Census data from the ACS also showed that Chatham County's median household income for 2023 was \$88,534. This is higher than North Carolina's median household income of \$69,904 (Small Area Income and Poverty Estimates). But importantly, the cost of living in Chatham County is 18.2% higher than the North Carolina state average and 9.2% higher than the U.S. average (Best Places, 2024). Details are shown in *Figure 9*.

Indicator	Chatham County	North Carolina
Estimated Percent Population Change 2017-2023 (U.S. Census)	14.6%	5.3%
Unemployment Rate - Aug 2024 (NC Dept. of Commerce – “Local Area Unemployment Statistics”)	3.6%	4.3%
Median Household Income – 2023 (NC Dept. of Commerce – “Income”)	\$88,534	\$69,904
Persons in Poverty – 2023 (U.S. Census)	10.5%	13.2%
Cost of Living – National Average of 100 (Best Places)	109.2	91
Living Wage (MIT Living Wage Calculator – 1 Adult)	\$22.44 (Hourly)	\$21.56 (Hourly)

Figure 9: Chatham County's Employment and Income Indicators

Cost of Living

Chatham County and North Carolina's measurements on the cost of living are derived from several factors that comprise the Cost of Living score indicated in *Figure 9*. Factors include the costs of groceries, healthcare, housing, median home cost, utilities, and transportation, as collected by MIT's Living Wage Calculator. Average living wage for the county is \$22.44 an hour (Glasmeier, 2024). For reference, the living wage represents the rate at which one person can fully support themselves including expenses.

Employment Preparation

Of Chatham County's population 16 years and over, 37,543 people (57.9% of adult population) were participating in the overall labor force in 2023 (U.S. Census, Selected Economic Characteristics). The largest portion of the labor force falls into the \$100,000 to \$149,999 wage bracket by household (U.S. Census, Income in the past 12 Months). Of the population age 25 years and over, 48.0% have a bachelor's degree or higher. The largest portion of the population who are 25 years and older (90.4%) have a high school diploma or higher as their educational attainment (U.S. Census Bureau, American Community Survey).

Employment Sector

Chatham County's economic base is constituted of a broad, diverse collection of employment sectors. These employment sectors include: Retail Trade (12.6%), Healthcare and Social Assistance (10.9%), Administration and Support for Waste Management and Remediation (9.8%), Manufacturing (9.4%), Accommodation and Food Services (9.3%), Educational Services (9.1%), and many others (Census OnTheMap, 2024). Details of Chatham County's major employers can be seen in *Figure 10* (as of Q1, 2024).

Major Employers

Rank	Company Name	Industry	Employment Range
1	Chatham County Schools	Educational Services	1000+
2	County Of Chatham	Public Administration	500-999
3	Carolina Meadows Inc	Health Care and Social Assistance	250-499
4	Mountaire Farms Inc	Agriculture, Forestry, Fishing and Hunting	250-499
5	Ace Electric Inc	Construction	250-499
6	Galloway Ridge Inc	Health Care and Social Assistance	250-499
7	Wal-Mart Associates Inc	Retail Trade	250-499
8	Rex Healthcare Inc	Health Care and Social Assistance	100-249
9	Old Dominion Insulation Inc	Construction	100-249
10	Flakeboard America Limited	Manufacturing	100-249
11	Piedmont Health Services Inc	Health Care and Social Assistance	100-249
12	Bji Employees Services Inc	Manufacturing	100-249
13	Mj's Staffing Incorporated	Administrative and Support and Waste Management and Remediation	100-249
14	Aegis Home Care LLC	Health Care and Social Assistance	100-249
15	Laurel Health Care Company Of Chatham	Health Care and Social Assistance	100-249
16	Fitch Creations Inc	Accommodation and Food Services	100-249
17	Harris Teeter LLC	Retail Trade	100-249
18	Lowes Home Centers Inc	Retail Trade	100-249
19	Brookwood Farms Inc	Manufacturing	100-249
20	Packers Sanitation Services Inc	Administrative and Support and Waste Management and Remediation	100-249
21	Southern Veneer Specialty Products	Manufacturing	100-249
22	Woods Charter School Company	Educational Services	100-249
23	Food Lion	Retail Trade	100-249
24	Central Network Retail Group LLC	Retail Trade	100-249
25	Mas Us Holdings Incorporated	Transportation and Warehousing	100-249

Figure 10: Chatham County's Top 25 Employers

Growth

This section discusses potential areas of growth within Chatham County:

- Geospatial Element and Determinants of Growth
- Characteristics of Growing Chatham County

Geospatial Elements and Determinants of Growth

Chatham County is over 700 square miles of farms, forests, and rolling hills set within North Carolina's geographic center. Located in North Carolina's Piedmont region, Chatham County is home to both historic towns and newly built neighborhoods shaped by the expanding suburbs of the Research Triangle. Chatham County is a highly desirable place to live, and residents enjoy many features of a high quality of life. People continue to move to Chatham County seeking all the area has to offer: affordability, good jobs, proximity to world-class healthcare, spacious homes, and temperate weather.

Historically, Chatham County's fertile soils attracted settlement and development, leading to the formation of the county's many farming communities. Today, the county continues to be home to a substantial rural population. Indeed, the area's landscape and temperate climate continue to support modern agriculture, including a contemporary growth in agritourism that showcases the region's distinctive character. The aspiration to celebrate and protect Chatham County's rural character aligns with local efforts for land conservation. In this way, county planners and public officials have broadly designated that denser development occur within townships and along major road corridors.

Growth in Chatham County will also be partly shaped by the transportation infrastructure in the region. The convergence of highways and railways in Chatham County continues to support the area's local economic growth, as detailed in the later sections for commercial and industrial development. Notably, the large reservoir of Jordan Lake—while a tremendous asset to the region—also represents a significant geographic barrier between the heart of Chatham County and Raleigh-Durham. Furthermore, protected properties and watershed regulations mean that much of the land around Jordan Lake is not suitable for high density development. Nonetheless, as the Research Triangle continues to grow, Chatham County is ideally situated to benefit from new development opportunities.

Finally, as with all development, the presence of water and sewer utilities is a powerful determinant of what can be built and where. In particular, the lack of wastewater infrastructure has historically prohibited denser residential development from keeping up with the high demand for housing. Individual well and septic systems are commonly used to support homes in unincorporated areas. However, the regionalization of TriRiver Water and forthcoming sewer system improvements mean that substantial residential and commercial growth can be supported in the near future (see Water and Sewer section).

Characteristics of Growing Chatham County

Chatham County has a varied mix of rural farms and forests, suburban neighborhoods, commercial corridors, and inviting downtowns. With its combination of scenic beauty, employment opportunities, comparative affordability, and friendly communities, it is no surprise that Chatham County has been attracting new families to the area. In the modern era, most of the growth in unincorporated Chatham County has been concentrated in the north, along the 15-501 corridor, where bedroom communities allow for workers to commute to nearby Chapel Hill and Durham. But increasingly, residential development is also being planned across the county, including renewed interest in historic small towns like Goldston. Furthermore, new residential developments continue to be planned in the expanding municipal cores of Pittsboro and Siler City, as well as suburban Cary.

The past few years have seen a very significant pace of residential development across the county. From spacious single-family subdivisions to new apartments along 15-501, the many characteristics of Chatham County's growth vary in style and location. Notably, Chatham County has seen many large-scale planned developments, such as Chatham Park and Briar Chapel. These master planned communities typically feature a mix of housing types as well as the incorporation of retail uses—meaning they are often highly desirable places to live and attractive to families with children. Indeed, the dynamic of thoughtful placemaking can be seen in Disney's recently announced Asteria community, a concept neighborhood of approximately 4,000 homes planned within Chatham Park (James, 2024).

In fact, residential growth has been so substantial that the demand for housing has largely exceeded the current capacity of wastewater infrastructure to support development. Still, new residential developments continue to be proposed and planned, and with forthcoming sewer improvements on the near horizon, Chatham County has all of the conditions present for continued population growth.

Residential Developments

Residential growth is occurring across the county. Commute times to work, amenities, and activities play a role in the demand for the steady residential growth. Currently, there are at least 51 developments that are either proposed, permitted, or actively under construction in the region, all of which are identified in *Figure 11*. Note that this list does not include 1) Chatham Park units—which are separately included in analysis, 2) Age-restricted or targeted developments, or 3) more speculative developments that lack sufficient basis for inclusion in current analysis. However, all these developments have been inventoried by ORED researchers and will continue to be monitored.

Jurisdiction	Development Name	Approved or Proposed Lots/Units	Built Lots/Units	Remaining Lots/Units
Cary	1309 Batchelor Rd and 1009 Knotty Oaks Dr	30	0	30
Cary	227 & 309 Barbee Rd Rezoning	18	0	18
Siler City	308 chestnut st	13	0	13
Siler City	920-1006 n. dogwood ave	6	0	6
County	Anfield Estates	11	0	11
Cary	Bost Subdivision - Destin Ph III	37	0	37
Pittsboro	Broadway Investors	250	0	250
County	CCO Rezoning Vickers Village	181	0	181
County	Chapel Oaks	31	0	31
County	Chestnut Creek	14	0	14
County	Conservancy at Jordan Lake	1524	0	1524
Pittsboro	Corbett Landing	115	0	115
County	Deercrest at Seaforth	24	0	24
Siler City	Dogwood Downs	16	0	16
County	Eden Parcels	11	0	11
Siler City	Everest Park - Glosson Road - PUD	429	0	429
County	Fearrington Village PUD	1602	1516	86
County	Firefly Overlook	30	0	30
County	Flatiron Forest	29	0	29
Siler City	Fox Haven - Lane Jordan Road	776	0	776
Goldston	Goldston Fields	90	0	90
Pittsboro	Griffin Farms	99	0	99
Pittsboro	Habitat for Humanity	48	0	48
County	Hamlets Forest	47	0	47
County	Hamlets Reserve	39	0	39
Siler City	Hamp Stone Road - Cambridge	31	0	31
Siler City	hampton village mhp phas 3b,4a	40	0	40

Siler City	Harold Andrews Rd - mark ward	250	0	250
Siler City	Harold Andrews Road - Hardik	214	0	214
Cary	Hidden Creek Subdivision	43	0	43
Cary	Homestead Subdivision	141	0	141
Siler City	Loves Creek Church Road	200	0	200
Siler City	Loves Creek Church Road - Lee Lambert	562	0	562
Pittsboro	Madison Ridge	303	0	303
County	McBane Park Conservation	149	0	149
Pittsboro	Medley at Northwood Landing	312	0	312
County	Parks at Meadowview	788	0	788
County	Pyewacket	92	0	92
Pittsboro	Reeves Farm	1500	0	1500
County	Retreat at Haw River	177	0	177
County	Ridgecrest Estates	30	0	30
County	Ridgewood Hills	25	0	25
Pittsboro	Robersons Walk	1200	0	1200
County	Ryan's Crossing	61	28	33
County	Savannah Ridge	78	0	78
Siler City	Shannon Drive Rezoning	120	0	120
County	Summit Terrace	26	0	26
County	Valiant Reserve	19	0	19
County	Westfall	242	72	170
Cary	Yates Store Rd Rezoning	67	0	67
Cary	Young Property Subdivision	126	0	126

Figure 11: Chatham County Residential Developments

Area Housing Market Statistics

The average home sale price for Chatham County was \$555,111 as of April 2024 (Zillow.com). While North Carolina's average sale price was lower at \$333,154 as of April 2024, homes in Chatham County have appreciated 86.8% in the last 10 years (Best Places 2024). From April 2020 to April 2024, Chatham County's average sale price increased over 52.8% from about \$363K to \$555K (Zillow.com). Information on the sale prices of all homes from 2020-2024 is provided in *Figure 12*.

Comparative Year	Chatham County	North Carolina
April 2024	\$555K	\$333K
April 2023	\$528K	\$318K
April 2022	\$497K	\$305K
April 2021	\$406K	\$252K
April 2020	\$363K	\$218K

Figure 12: Chatham County vs. North Carolina Average Sale Prices

Commercial/Industrial Development

This section describes current and future commercial and industrial development in Chatham County. This is an important topic to cover when considering population growth within a county as this development contributes to a more stable economy with higher paying jobs and appealing employee benefits; a notion that tends to be a strong pull factor for prospective families.

Commercial Development

There are a variety of commercial land uses supporting a healthy mix of market activities across Chatham County. From the family restaurants of Goldston to the historic downtowns of Pittsboro and Siler City, commercial enterprises cater to demand for neighborhood retail and amenities. Between new national chains and longstanding small businesses, the county's commercial operations create jobs, support the local economy, and fulfill community needs.

In the historic downtowns of Pittsboro and Siler City, thriving main streets offer numerous food and retail options for citizens and tourists alike. In Pittsboro, weekly farmers markets take place at The Plant, a popular 17-acre eco-industrial park that is home to two dozen small businesses offering everything from beverages, to local art, and even axe throwing. The new 'social district' in downtown Pittsboro helps to support numerous breweries and restaurants. Meanwhile in historic Siler City, salons and coffee shops mix within a thriving arts district full of local gifts. Furthermore, along the 15-501 corridor in northern Chatham County, new food and retail options continue to expand. Indeed, MOSAIC at Chatham Park is growing as a mixed-use hub—and across the road, a new Lowes Foods grocery store opened this past year.

In rural Chatham County, the farms, forests, and rolling hills continue to support popular agritourism enterprises, such as rustic wedding venues and event spaces. This agritourism pairs well with Chatham County's natural landscapes and recreational assets, such as the Haw River and Jordan Lake. In total, Chatham County's central location, growing population, and proximity to the Research Triangle help to support a robust and growing commercial sector. ORED researchers believe the current trends of new commercial development will continue to support and align with future residential growth. This pattern of commercial development is further augmented by Chatham County's thriving industrial sector, which is detailed in the following section.

Industrial Development

In recent years, Chatham County has achieved staggering success in attracting industrial development. Between two megasite projects and several other newer industrial enterprises, Chatham County is surely one of the top-performing communities for economic development in the entire country. While the full scope of this industrial development will take years to come into fruition, the compounding effects of economic growth are already being seen.

In eastern Chatham County, the Triangle Innovation Point (TIP) megasite is set across over 2,000 acres in Moncure. With access to U.S Highway 1, two rail lines, utilities, and proximity to the entire Research Triangle area, the modern megasite represented a unique opportunity for

large-scale industrial development. Accordingly, when VinFast, a Vietnamese electric car manufacturer, announced plans in 2022 to build their first American auto plant at the TIP East site, the project was hailed as an unprecedented economic development achievement (Rappaport, 2022). With over 7,000 jobs expected from the site, VinFast is the largest economic development project in the history of North Carolina. But although VinFast broke ground on construction in the summer of 2023, progress has been slower in light of shifting electric vehicle market conditions (Opeka, 2024). Still, public officials express confidence about the project and the long-term potential for the TIP site. Indeed, in early 2023, FedEx opened a 338,000 square foot distribution center at the TIP site due to “ease of access to major highways, proximity to customers’ distribution centers, and a strong local community workforce” (Parker, 2022).

In western Chatham County, the Chatham-Siler City Advanced Manufacturing (CAM) site is sited on 1,350 acres just outside of Siler City. With access to U.S. 64 and U.S. 421 as well as an existing rail line, the CAM megasite was marketed as a shovel-ready location for development situated close to skilled talent, transportation options, suppliers, and consumers. These elements attracted WolfSpeed, a silicon carbide manufacturing company. In 2022, WolfSpeed announced plans to establish a new \$5 billion plant at the CAM site and create 1,800 jobs—again one of the largest economic development projects in state history. WolfSpeed’s product families include silicon carbide materials, power-switching devices and devices targeted for applications such as electric vehicles, fast charging inverters, power supplies, and service the telecommunications, military, and aerospace industries (CEDC, 2022). As of late 2024, progress on the WolfSpeed site has been ahead of schedule, with some operations expected to begin in early 2025. Furthermore, the CAM site has been attracting other industrial operations. In April of 2024, housing component manufacturer Innovative Construction Group (ICG) announced plans to invest nearly \$40 million build a new plant on 46 acres of the CAM site (Roush, 2024). With room at the CAM site for additional enterprises, Siler City is sure to be a major manufacturing hub in the near future.

In addition to the megasite projects, Chatham County continues to attract other industrial ventures. In December 2024, MetOx International, a maker of efficient power transmission cables, announced plans to create 333 jobs and invest about \$194 million in Chatham County. This new large-scale manufacturing facility is part of the company’s long-range plan to provide more efficient power for data centers, medical diagnostics and more (Hagel, 2024).

Chatham County has a lot to offer prospective employers thinking about opening facilities in the area. Between existing and forthcoming industries, railroad and highway connections, and an educated and experienced workforce, the region can be particularly appealing to both large and small industrial enterprises. All of these elements, combined with a steadily growing population and other major operations nearby—such as the Toyota plant in Randolph County—means Chatham County has promising conditions for sustained industrial development. With thousands of new jobs coming to Chatham County in the next decade, many more families can be expected to move to the area seeking employment opportunities.

Infrastructure

Transportation

Chatham County's transportation system is a fabric of roads, railways, bus networks, and bicycle and pedestrian paths. Mobility across the county largely depends upon automobiles, with U.S 15-501 and U.S. 64 being major commuting corridors into Chapel Hill, Durham, and Raleigh. Although congestion can be an issue along these major corridors during peak hours, in general most of Chatham County enjoys open and scenic country roads that highlight the area's beautiful landscapes.

Major highways in Chatham County include U.S. 64, U.S. 15-501, U.S. 421, U.S. 1, NC 87, and NC 751. There are also several planned roadway improvements in the area. These include modernizations of U.S 64 in a few areas (medians, sidewalks, etc.), resurfacing of 15-501 in Pittsboro, and the conversion of the intersection of U.S. 64 and NC 751 into an interchange—effectively making 64 into a freeway near the county line. In addition, progress continues on Chatham Park Way in Pittsboro. There are also several roadway improvements in the Moncure area associated with the VinFast project.

Importantly, U.S. 421 in Chatham County is a considerable asset to the region, and helped to attract major economic development projects like WolfSpeed. As an existing freeway, U.S. 421 in Chatham County already meets interstate standards, and the passage of the Infrastructure Investment and Jobs Act in November 2021 proposed to upgrade US 421 to Interstate status, possibly as I-685. Although the ultimate designation of this highway remains to be seen, any new Interstate designation could overlay the existing freeway from I-85 south of Greensboro to the east side of Sanford.

Water and Sewer

In Chatham County, water and sewer infrastructure has been historically maintained and operated by several different authorities. Until recently the County and its municipalities have separately administered their own services, but in the past few years a dramatic shift has been taking place in Chatham county’s water and sewer operations. In 2024, after ten years in the making, the City of Sanford and Town of Pittsboro merged their water and wastewater systems into a regional provider branded as TriRiver Water (History, 2024). This new and larger regional provider has been an immediate success, and in November of 2024 the Chatham County Board of Commissioners also approved the merger of County water utilities with TriRiver. Additionally, the Town of Siler City is currently discussing the likely merger of their water and sewer services with TriRiver as well (Chatham County & Siler City, 2024).

Although the availability of sewer infrastructure has historically been a deterrent to development in Chatham County, the regionalization and consolidation of TriRiver Water means reduced operating costs and expenditures being spread across a larger customer base. This results in savings for everyone, including homeowners and businesses (History, 2024). Furthermore, new investments in local wastewater infrastructure means residential development can expand significantly in the near future. Both Pittsboro’s force main to Sanford and Siler City’s expansion of their existing wastewater treatment plant are expected to be completed around 2027, which will lift development moratoriums and open up allowances for residential growth. In sum, the regionalization of TriRiver Water in Chatham County indicates that greater development will be supported across Chatham County in the years to come.

Entity WTP	Capacity
Pittsboro WTP	2 million gallons per day
Pittsboro WWTP – Roberson Creek	750,000 gallons per day
Siler City WTP	4 million gallons per day
Siler City WWTP	4 million gallons per day <i>(Planned expansion to 6 MGD by 2027)</i>
TriRiver Water – Big Buffalo WWTP	12 million gallons per day
TriRiver Water – Sanford Water Filtration Facility	12 million gallons per day <i>(Planned expansion to 30 MGD by 2028)</i>

Figure 13+3: Chatham County Utilities Capacities

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