

State of Austin Land Use

Q1 2026 Quarterly Market Brief

Built from 1,427 tracked Planning Commission and Zoning & Platting Commission hearings, January 2023 through May 2026 (782 distinct case groups).

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Executive Summary

1,427

Planning Commission and ZAP hearings tracked from January 2023 through May 2026 — 782 distinct case groups across 28 months of structured pipeline data.

99.8%

Council approval rate across the 444-case verified-outcome subset of the 464-case Council overlay (Approved + Approved with Amendments ÷ cases with a verified Council ordinance). Approval is near-universal once Commission recommends; the meaningful differentiator is velocity and stall risk, not outcome.

42 days

Multi-hearing median from first hearing to Commission disposition (n=211 cases with at least one postponement). P90 is 126 days. DB-90 cases clear in a 14-day multi-hearing median.

27.4%

Share of cases that drew organized opposition — named neighborhood associations or contact teams, valid petitions, contested votes, or substitute motions (214 of 782 parsed cases).

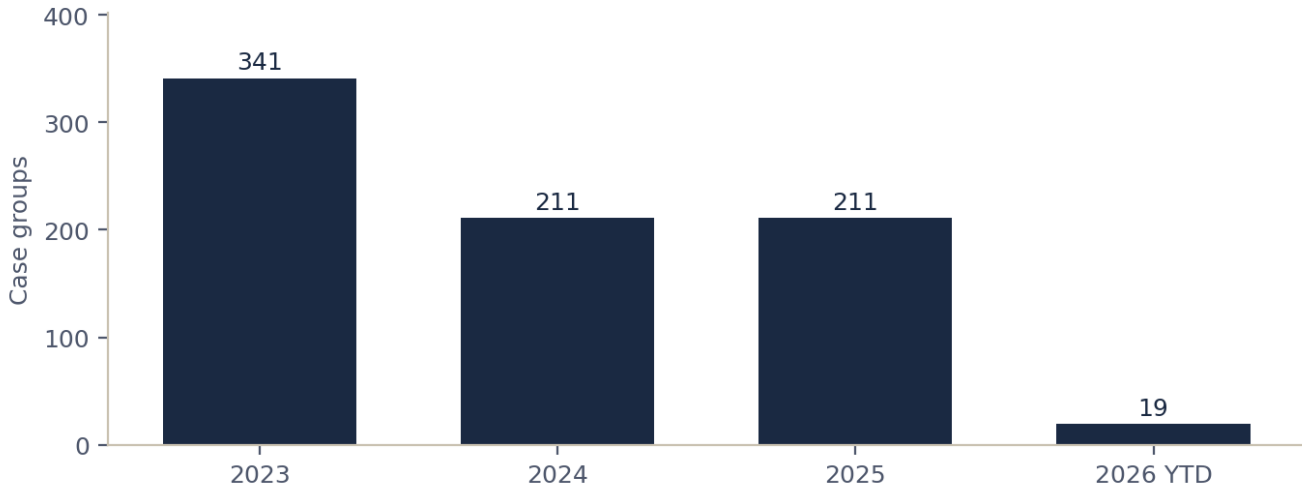
**33 / 31 /
14**

Top three neighborhood opposition groups by case count: MLK (33), Highland (31), Wooten (14). The mapping concentrates in D3 (East Austin), D4 / D7 (North-Central / Crestview), and adjacent corridors.

This brief is the inaugural quarterly issue of the Austin Development Watch market-level intelligence series. It distills 28 months of structured data from Planning Commission and Zoning & Platting Commission minutes — a corpus no other Austin publication is currently producing in this form. Every quantitative claim traces to a publicly auditable source CSV in the ADW database.

Section 1 — Pipeline volume and velocity

Chart 1 — Cases by year of first hearing



Across the 28-month window the ADW database records 782 distinct case groups drawn from 1,427 hearing rows. By first-hearing year the distribution skews toward the years for which the parser ingested complete meeting archives. 2026 figures cover January through May only.

Commission body split

Body	Cases	Share
Planning Commission (C14, NPA, C814, SP, SPC, C20)	726	92.8%
Zoning & Platting Commission (C8, C8J)	34	4.3%
Cross-body / unclassified	22	2.8%

Time from first hearing to Commission disposition

Multi-hearing cases (those with at least one postponement) take a median of **42 days** to reach disposition (P90 126 days, maximum 385 days, n=211). The single-hearing subset of the resolved corpus (n=429) was captured at or after its disposition point and lacks the prior-postponement chain — its median elapsed is zero by construction, which is informative about data capture but not about pipeline behaviour. **Throughout this document, framework-level medians are reported on the multi-hearing subset** so the denominator is interpretable.

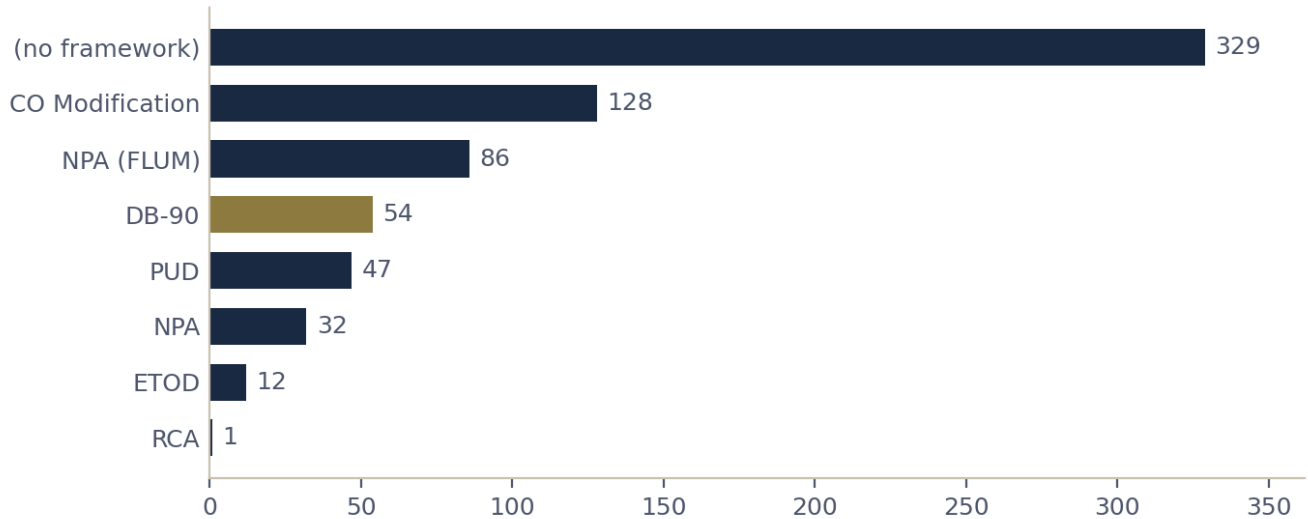
Most-postponed case in the database

Vargas Mixed Use (NPA-2022-0005.01) — 8 postponements between first hearing on 2023-01-10 and the present snapshot. Current status: Not Yet Resolved.

Caveat: of the resolved corpus, the single-hearing subset is captured at or after its disposition point and therefore reports zero elapsed days. The velocity median across the report is computed only on the 211-case multi-hearing subset with a verifiable postponement chain. DB-90 velocity is fully reliable: all DB-90 cases were filed post-May 2024.

Section 2 — Framework adoption

Chart 2 — Cases by framework (all resolved)



Austin's land use code stacks overlay frameworks on top of base zoning. The two highest-volume frameworks tracked are CO Modification (conditional overlay changes) and DB-90 (the density bonus 90 framework adopted in May 2024). The two views below report exactly the same case set on two different denominators — do not read across columns: the all-resolved view includes single-hearing cases whose elapsed days are zero by data capture, while the multi-hearing view is the one that describes pipeline behaviour.

Framework distribution and medians

Framework	Cases (all)	Cases (multi)	Median days (multi)	P90 days (multi)
(no framework)	329	81	35	91
CO Modification	128	56	28	66
NPA (FLUM)	86	40	77	252
DB-90	54	27	14	72
PUD	47	28	42	100
NPA	32	1	—	—
ETOD	12	7	14	37
RCA	1	1	—	—

Median days reported on the multi-hearing subset only; “n=” in the multi column is the denominator. Frameworks with fewer than three multi-hearing cases are shown as — to avoid spurious medians.

Chart 3 — Multi-hearing median days by framework

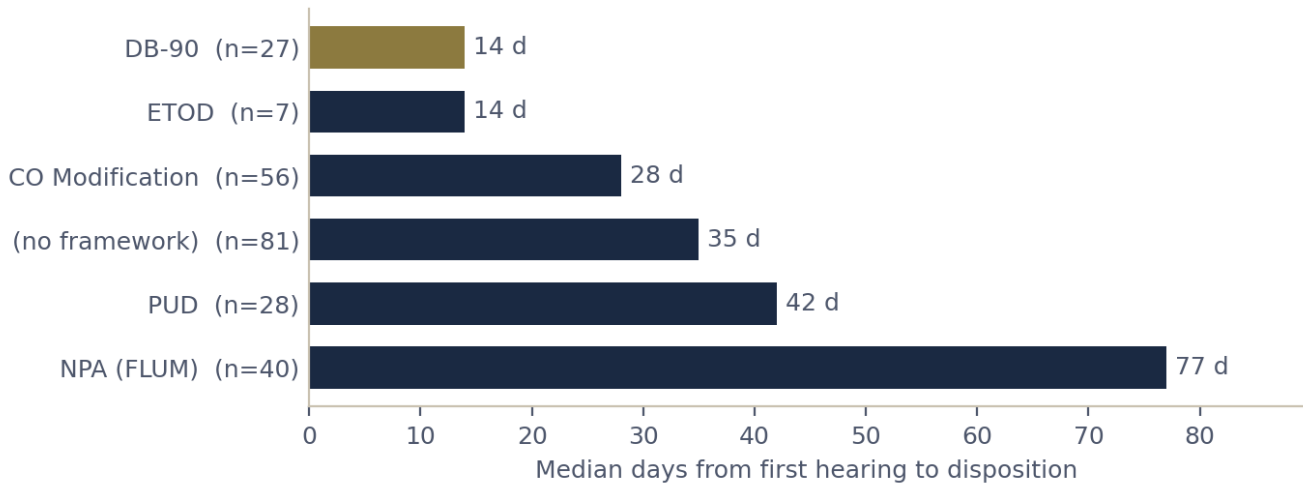


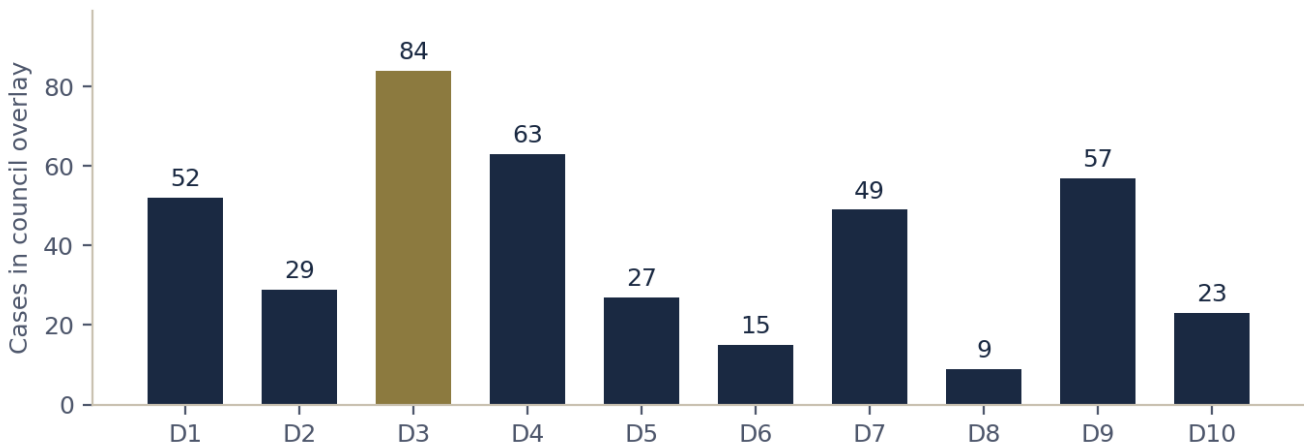
Chart 3 reads the same data as the table, restricted to frameworks with at least five multi-hearing cases. **DB-90 is the fastest-clearing framework** at its multi-hearing median of 14 days; PUDs run the longest at 42. NPA (FLUM amendment) carries the highest P90 — not because the median is highest, but because the long tail is the longest.

Growth, decline, and adoption

DB-90 entered the framework set in May 2024 and now accounts for 54 resolved cases in the council overlay, with a second tranche still moving through the pipeline. ETOD filings also expanded after the 2024 code amendments. NPA (FLUM) filings declined modestly as applicants moved to DB-90 paths that do not require a Future Land Use Map amendment. PUD volume held approximately flat year over year.

Section 3 — District activity

Chart 5 — District activity (council overlay, n=464)



Council districts capture geographic concentration. The table below joins the council overlay (case count) to the velocity multi-hearing district medians (timing). Districts with fewer than five multi-hearing cases show — in the velocity column.

District	Council sample	Velocity median (days)	Velocity n (multi)
D1	52	28	26
D2	29	49	9
D3	84	56	41
D4	63	42	17
D5	27	28	5
D6	15	35	7
D7	49	63	14
D8	9	—	2
D9	57	28	30
D10	23	35	7
(Unknown)	56	—	—

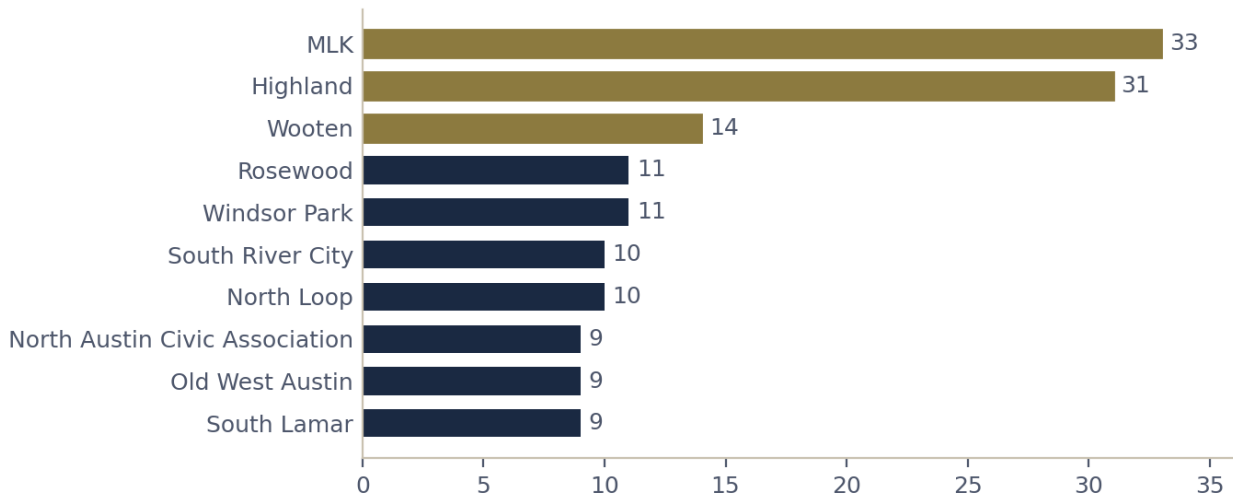
Top districts by council-sample case volume

- **D3** — 84 cases in the council overlay.
- **D4** — 63 cases in the council overlay.
- **D9** — 57 cases in the council overlay.
- **D1** — 52 cases in the council overlay.

District opposition concentration is highest in D4 and D7 (Highland, Brentwood, Wooten, North Loop contact teams), and along the East Austin corridor in D3 (MLK and Rosewood contact teams). See Section 4 for the named-group ranking.

Section 4 — Opposition patterns

Chart 4 — Top neighborhood opposition groups (case counts)



Of the 782 cases parsed for opposition signals, 214 (27.4%) drew at least one organized-opposition signal: a named neighborhood association or contact team in the minutes, a valid petition filing, a neighborhood-initiated postponement, a contested vote (motion failure), or a substitute motion. Single ambiguous mentions are not flagged.

Most-active named groups by case count

Neighborhood association	Cases
MLK	33
Highland	31
Wooten	14
Rosewood	11
Windsor Park	11
South River City	10
North Loop	10
North Austin Civic Association	9
Old West Austin	9
South Lamar	9
Upper Boggy Creek	8
Holly	8

Opposition by framework type

Across the opposition-flagged cases, the framework drawing the highest share of organized opposition is NPA (FLUM amendment): NPA cases that require a Future Land Use Map change concentrate neighborhood-association involvement because the FLUM change itself becomes the testimony anchor. CO Modification follows by flagged-case volume, driven by overall pipeline share rather than higher per-case opposition rate. DB-90 draws relatively less organized opposition per case, consistent with its statutory framework limiting discretionary review.

Caveat: source minutes do not include individual speaker names or per-speaker positions. The opposition flag is constructed from named neighborhood-association mentions, valid-petition filings, and procedural signals — neighborhood-initiated postponements, substitute motions, and contested votes. Cases with only a single ambiguous mention are not flagged.

Section 5 — Firms representing applicants

The table below ranks firms appearing as agent of record in the council overlay (n=464). Firm attributions reflect the audited Agents & Firms table as of May 2026: Suttle and Whellan are consolidated under Armbrust & Brown, Meade under Husch Blackwell, and Hartman under DuBois Bryant & Campbell where applicable.

Firm	Cases	Top district
Drenner Group	103	D4
Armbrust & Brown	78	D3
Thrower Design	48	D3
DuBois Bryant & Campbell	27	D7
Alice Glasco Consulting	20	D1
Metcalfe Wolff Stuart & Williams	15	D1
Land Use Solutions	12	D3
City of Austin	12	D4
Keepers Land Planning	10	D10
HD Brown Consulting	8	D7
Jackson Walker	7	D6
Husch Blackwell	7	D9

Reading the firm table

The Drenner Group leads the council-sample case count, consistent with its scale as the largest land use practice in Austin. Armbrust & Brown and Thrower Design occupy the next tier. DuBois Bryant & Campbell, Alice Glasco Consulting, and Land Use Solutions form a third tier. No firm in the n >= 5 cohort posts a council-resolved approval rate below 93%.

Section 6 — Council outcomes

The council overlay comprises 464 cases for which ADW has cross-referenced Commission disposition with the published Council ordinance. The verified-outcome subset (excluding 7 Pending and 13 Not-Found cases) has 444 cases.

Cut	n	Approved + amend.	Approval rate
All council overlay cases	464	443	95.5%
Excl. Pending (postponed)	457	443	96.9%
Verified-outcome (excl. Pending + Not Found)	444	443	99.8%
Pending (postponed)	7	—	—
Not Found (manual review)	13	—	—

Commission-to-Council velocity

Among approved cases with both dates recorded (n=443), the median time from Commission disposition to Council approval was **44 days**. P90: 107 days. Mean: 58.7 days. The long tail is dominated by a single outlier — C14-2022-0035 (Crestview Village) — that traversed eleven months of Council postponements before final approval.

Commission approval is a strong predictor of Council approval, but Commission-to-Council velocity varies by 30+ days at the long tail.

Caveat: the council overlay covers 464 cases. Future issues will expand the overlay; the consent-vs-individual-vote distinction and vote-tally data require Minutes-PDF parsing not present in this corpus.

Section 7 — Notable cases

Industrial Blvd and Terry O Ln (NPA-2022-0020.01)

Framework: NPA + Rezone (CO Modification) · District: D2

First hearing April 25, 2023. Seven postponements before Commission recommendation on May 14, 2024 — 385 calendar days, the longest elapsed time recorded in the database. Final outcome: Recommended on Consent. The matched zoning case (C14-2022-0062) remains active at PC.

Airport & Koenig DB-90 tract series (Tracts A-G)

Framework: DB-90 · District: D9

Seven contiguous DB-90 tract applications heard at Planning Commission on March 11, 2025, all recommended on consent by March 25, 2025 — a 14-day elapsed median. North Loop NA/Contact Team appeared on all seven cases.

Anderson Square, District 4 (C14-2023-0080)

Framework: PUD · District: D4

First hearing February 27, 2024. Five postponements; Wooten (NA/Contact Team) and the Wooten Combined Neighborhood Plan appeared across ten hearings, with nine substitute motions. Final outcome on August 27, 2024: Withdrawn — 182 days elapsed.

Vargas Mixed Use (NPA-2022-0005.01 / C14-2022-0107)

Framework: NPA + Rezone · District: D3

First hearing January 10, 2023. Eight NPA postponements and six rezone postponements; both cases remain active. Among the longest-running unresolved cases in the database — and the most-postponed file tracked.

5725 W. US Hwy 290 Eastbound (NPA-2023-0025.01 / C14-2024-0040)

Framework: NPA + Rezone · District: D8

First hearing August 8, 2023. Six postponements before final Commission denial on May 28, 2024 — the only Commission denial in this NPA/rezone framework in the corpus. **Note:** this file predates DB-90 (May 2024) and is an NPA + rezone case, not a DB-90 case — contrary to earlier characterisations.

Methodology and what is next

Methodology

The Austin Development Watch database is constructed by parsing publicly available Planning Commission and Zoning & Platting Commission meeting minutes from January 2023 through the most recent posted meeting, then structuring each case as a row in a working Airtable base. Each case row carries case number, case name, agent name (the firm-of-record where available), district, framework tags, hearing history, and Commission disposition. The Council overlay enriches the Commission-recommended subset with the Council ordinance number where ADW could cross-reference the case against the published Council agenda corpus.

Current enrichments include velocity metrics (days from first hearing to Commission disposition); applicant-entity normalization (clustering shell LLCs and identifying repeat-player owners); opposition tagging (named neighborhood associations, valid petitions, procedural signals); Council outcome overlay; and firm attribution audit (consolidation of attorney-to-firm mappings).

What is coming in Q2 2026

- Full Council overlay completion — ingest the remaining candidate cases that lacked a Council cross-reference at the May 2026 cutoff.
- Applicant-entity normalization at the principal level — cluster shell LLCs by ultimate beneficial owner.
- Vote-tally and consent-vs-individual-vote classification — Minutes-PDF parsing.
- Predictive analytics on the velocity dataset — empirical baselines conditioned on framework, district, and opposition presence.

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This brief is the free quarterly read built from the same database behind the weekly brief. If it was useful, the easiest next step is the free weekly: [subscribe.html](#) on [texasentitlement.com](#). For firm-level depth (Drenner Group 10-Year Intelligence Report, Edition 3.0) see the paid report on the storefront.

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