



GROWTH MANAGEMENT PLAN

Original Adoption Date:

August 12, 1991

Last Amended:

September 8, 2025

Ordinance No. 2025-22

(Documentary #25090812a)

Effective Date – October 9, 2025

Acknowledgements

We are tremendously grateful for the many people who contributed their ideas, time, and energies to envision and shape Orlando's Growth Management Plan.

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Chapter 1

Vision Statement & Introduction



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A VISION FOR THE CITY BEAUTIFUL

ORLANDO'S 2050 GROWTH MANAGEMENT PLAN

Our Vision: Orlando is a 'community for a lifetime' focused on preserving its natural and man-made amenities while planning for an equitable and resilient future. Orlando is a city rich in history and culture, that is vibrant, livable, and inclusive, with safe and convenient mobility options, efficient and well-maintained infrastructure, a beautiful and sustainable environment, and responsible and accessible government.

OUR ONCE AND FUTURE CITY

As we look to the future, our past achievements provide inspiration for even greater things to come. Orlando is fortunate to have a rich heritage, grounded by a 125-year history of community planning dating back to the City Beautiful movement. City leaders and residents alike have long sought to protect the natural beauty that attracted settlers in the first place, from the days when Orlando was primarily an agricultural town and the crossroads for the citrus industry, through the late 1960's and the advent of the Disney explosion, through the various bust and boom-times of the 1980's, 1990's, 2000's, and today as we embrace the third decade of the 21st century.

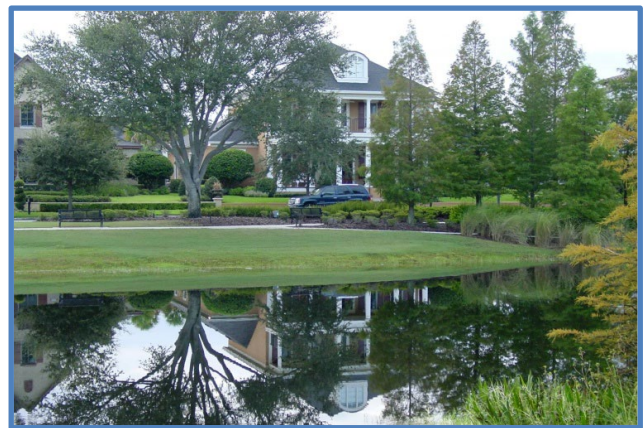


From the beginning, Orlando's history has been marked by a commitment to blending growth with natural amenities, and keeping lakeshores and other natural areas open to the public. Orlando's lakes have always been the focal point of its beauty, a beauty that was enhanced with the addition of a strong City-directed landscaping program in the late 19th century, including the planting of countless hundreds of trees.

Protecting our lakes, planting more diversified, flowering foliage and promoting high-quality development have always made Orlando a truly desirable place to live. This was evident in the City's first Comprehensive Plan in 1926. An understanding of Orlando's heritage, incorporated into a plan that offers a clear vision for the future of Orlando, will provide the direction for progress as the City proceeds through the 21st century.



The City faces many challenges, but one concept remains clear. Orlando must define and strengthen the key elements that working together, will make "The City Beautiful" an even better place to live in the year 2050. This requires an understanding not only of Orlando's historical role, but also the City's role within the Central Florida region. According to current studies and projections, the Orlando Metropolitan Statistical Area (MSA) will continue to be one of the fastest-growing areas in the nation. By the year 2050, the population of the Orlando MSA will increase 34% from its current 2,833,764 (April 1, 2023) to 3,786,800 (Medium Projections, Bureau of Economic & Business Research, University of Florida, Florida Population Studies Vol. 57, Bulletin 198, January 2024), with the City of Orlando proper growing by 48% from 334,490 to 495,881 during approximately the same period (April 1, 2024 to 2050). While substantial growth will occur in the MSA, Orlando will sustain its role as the focal point – or central city – of the region, a position it has held for nearly 150 years.



This Growth Management Plan (GMP) is by no means a significant departure from the growth management policies originally established in the early 1980's. Rather the policies and actions established in this GMP further refine and expand on the planning efforts originally adopted by the Orlando City Council in 1980 and 1985.

The 1980 GMP established the basic growth management framework necessary for Orlando to evolve into a vibrant and diversified regional center. In 1985 and 1991, the City further detailed the actions needed to achieve this regional center while also protecting neighborhoods and enhancing quality of life. And with the adoption of this GMP update in 2025, Orlando continues to define its vision for the future, a vision based on community consensus and shared values.

A VIBRANT, LIVABLE, AND INCLUSIVE COMMUNITY

Orlando’s vision for a truly vibrant, livable, and inclusive community focuses on economic opportunity, the creation and preservation of our neighborhoods and their beautiful amenities, as well as thoughtful placemaking that fully recognizes the needs and desires of people of all ages – we truly wish to be an age-friendly “community for a lifetime”.

Key elements of our “livability” vision include:

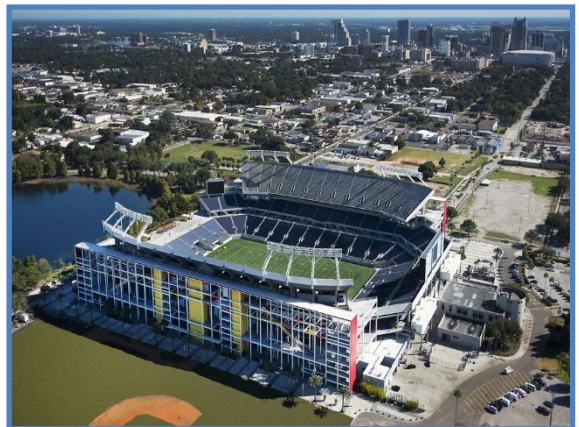
- A **future land use philosophy** that values neighborhoods as the fundamental building block of community and which encourages appropriately scaled development and redevelopment within a hierarchy of mixed-use activity centers connected by mixed-use corridors;
- An **economic development strategy** that recognizes the vital importance of education in developing a highly skilled workforce, that targets and encourages a wide variety of services and industries to help diversify our local economy, and which supports small businesses particularly in our Main Street Districts;
- A **rich diversity of housing types** that includes a healthy supply of market rate, mixed-income, and affordable housing options throughout our community, and which encourages people to age in place;
- A **preservation and design philosophy** focused on conserving Orlando’s historic resources – both natural and manmade – while ensuring that new buildings and spaces are located and designed to respect and strengthen the City as a whole;



- A **beautiful and sustainable public realm** that includes lakes, parks, gardens, well-shaded bike/pedestrian paths and streetscapes, as well as environmentally sensitive areas that are accessible to people of all ages and abilities;
- A **network of strong cultural arts** facilities, institutions, organizations, and events that serve the region as well as locals, along with well-designed, appropriately located and executed public art projects;
- A recognition of **property rights** for both residents and businesses; and finally,
- An understanding that Orlando must be a **future-ready city**, one that uses stakeholder engagement, innovation and technological advancement and resilience to cultivate a thriving and enduring community.

Orlando's population is more diverse today than ever before in its history. Residents come from many economic, social, and cultural backgrounds. Recognizing diversity and incorporating it into the physical environment includes considerations for universal design and access by people of all ages and abilities, multi-lingual or universal signage, variety in housing to accommodate diverse family types and a multi-modal transportation system.

As Orlando's demographic landscape evolves, it's increasingly vital to channel resources towards a more family-oriented community – one that embraces multiple generations. This entails prioritizing essential services, educational facilities, and amenities. Key aspects include furthering the development of cultural arts, parks, and recreational facilities, with a particular focus on enhancing Orlando's signature parks and lakes.



We need to create opportunities that cater to diverse family situations while embracing cultural diversity. Supporting both traditional and non-traditional family lifestyles will significantly impact the community's quality of life, known for its strong sense of family and belonging. The plan addresses competing needs by offering parks, cultural activities, housing, daycare and senior living facilities, and nearby employment and shopping options, allowing people to spend more time with the people that they love and on activities they enjoy rather than commuting.

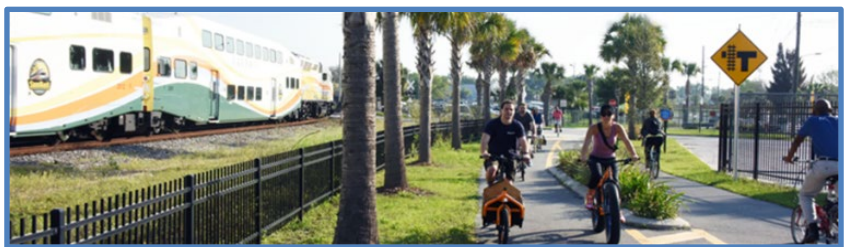
SAFE & CONVENIENT MOBILITY OPTIONS

Orlando is investing in a comprehensive and inclusive mobility strategy to effectively plan for all transportation alternatives. The City's mobility strategy contains key components to provide a safe and convenient transportation system for people of all ages including our residents and visitors. To work properly, the activity center/mixed use corridor land use concept must be supported by a resilient transportation system that responds to the community's specific needs.



Highway expansion cannot be undertaken based solely on capacity needs, particularly when it is at the expense of safety and neighborhood livability. Therefore, the City of Orlando will continue to work toward a multi-modal approach within the context of the comprehensive planning process.

The most important thing about implementing a multi-modal transportation system is recognizing that Orlando does have the choice to design our urban environment to make it more transit-feasible in the future.



Through this GMP, Orlando will consciously and conscientiously shape development patterns to achieve interrelated objectives – high quality infill development and redevelopment coupled with repurposed streets which accommodate all modes of travel, including public transportation and pleasant bicycle and pedestrian amenities. The policies of this plan are designed to reach the thresholds necessary for public transit to be accessible, effective, safe, and convenient.

Financing of roadways and location of new transportation corridors must not be dictated by development pressures, but based rather on effective means of serving a hierarchy of mixed-use activity centers and mixed-use corridors while providing access to existing neighborhoods, employment centers, and our Main Streets. This approach recognizes the very nature of urban development and balances the need for responsible mobility solutions with other goals and objectives in the plan.

Orlando is the focal point of vital transportation projects which serve the Central Florida region including new and expanded roadways, inter-city rail, commuter rail, freight service, bus and bus rapid transit, as well as aviation and advanced air mobility. Every effort should be made to fully integrate these mobility options into an overall context-driven transportation plan.

Developing the Orlando International Airport is crucial for Orlando's evolution as we continue through the 21st century. Orlando's strategic location as the central city of the region and the ability of the airport to expand are two factors that enable this critical resource to play an important role in the economic, as well as transportation, future of the region. The role of the airport as a major transportation hub, linking air, public transit, intercity rail, advanced air mobility, and automobile is an aspect of this plan that has enormous potential for influencing the future character of the region.

Central Florida cannot build all the roads needed to serve a totally automobile-oriented development plan. Slower but safer traffic will still occur consistent with our Vision Zero and Repurposing Our Streets approach. Orlando is committed to taking a leadership role in implementing multi-modal transportation opportunities, and a complementary land use pattern that will allow for a balanced mobility system.



To accomplish this, not only must the existing and planned road network be effectively designed and utilized, but public transportation, bicycle and pedestrian systems must also be expanded and maintained to contribute to a better, safer, and more livable environment.

EFFICIENT & WELL-MAINTAINED INFRASTRUCTURE

To accommodate Orlando's continued growth, the City will ensure that a wide range of facilities, amenities, and services are provided. Environmentally conscious potable water, wastewater (water reclamation), stormwater & aquifer protection, solid waste, and energy services will be located to enhance and efficiently develop our activity centers, mixed-use corridors, industrial areas, and our neighborhoods. Water resources will be carefully analyzed in the development review process, and water reclamation will be used as efficiently as possible. Excellent police and fire facilities and services will be provided to protect the populace and its property.

Financing for the provision of necessary infrastructure, including transportation, will require considerable public and private participation. This plan includes a combination of service fees, impact fees, and general property taxes, utility fees, special assessments, users fees and other resources necessary to eliminate existing infrastructure deficiencies and provide the infrastructure needed for new development at the levels of service desired by the City.



A BEAUTIFUL & ENVIRONMENTALLY-FRIENDLY COMMUNITY

Orlando is transforming into one of the most environmentally-friendly, economically and socially vibrant communities in the nation. The City understands the inherent aesthetic and functional value of our natural resources including our lakes, water resources, and wetland systems and is dedicated to their preservation.

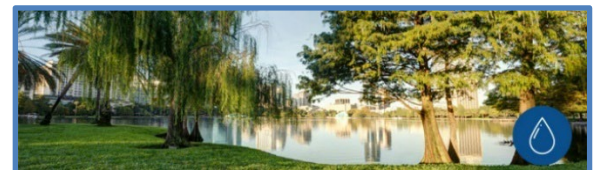
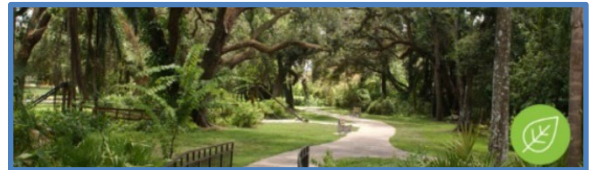


In creating the Green Works Initiative Community Action Plan (2013, 2018), the City is working to strategize and implement sustainability initiatives and best practices to help advance its goals, while incorporating overarching themes of social equity, climate resiliency, and smart technology innovation as a guiding framework for more advanced sustainability. The Green Works

Community Action Plan was one of the first in America to both inform and align its strategies with United Nations Sustainable Development Goals to advance critical global efforts.

Orlando's sustainability focus areas include:

- Working towards a **local food system** that encompasses the entire cycle of food production and consumption, including growing, transporting, and the use of disposal;
- Improving **livability** and quality of life for people of all ages, including the natural environment and the tree canopy, entertainment, social, and recreational opportunities, economic prosperity, walkability, culture, and equity;
- Improving **transportation and mobility** to enable residents to reduce reliance on private automobiles and invest in infrastructure to encourage more sustainable choices;
- Striving to become a “**zero waste**” community, aiming to eliminate sending solid waste to landfills by 2040;
- Ensuring **clean water** which supports the lives of people and wildlife, recognizing it is a valuable resource that can provide greater opportunity for economic development and recreation; and
- Encouraging **clean energy and green buildings** by becoming a national leader in energy efficiency for new and existing commercial buildings that reduce waste and pollution, while saving businesses and residents significant amounts of money.



As part of the Green Works Orlando Initiative, Orlando prepared a Municipal Operations Sustainability Plan and Progress Report (2012, 2017), which focuses on goals and strategies that the City and its

employees can implement to make Orlando a true leader in sustainable practices. Each topic has an area dedicated to resiliency, which is the capacity of a system to undergo disturbance and maintain its function and controls. The City understands that it must be prepared for disturbances such as hurricanes, possible fuel shortages, drought, extreme rain events, electricity outages, as well as the urban heat island effect.

RESPONSIBLE & ACCESSIBLE GOVERNMENT

Orlando is dedicated to providing effective, efficient, and financially feasible services to residents, property owners, businesses, and visitors. The City will coordinate its capital improvements planning and programming with our partners including Federal, State, other local jurisdictions, Orange County Public Schools, and the local development community.

Specifically, Orlando is committed to working closely with the University of Central Florida, Valencia College, Orange County Public Schools and Orange County government to ensure that schools continue to form the cornerstone of neighborhoods.

Enhanced educational opportunities for people of all ages and economic backgrounds are critical if Orlando is to reach its full potential for economic opportunity and preserve its social fabric. While developing educational opportunities is not directly within the City's control, it is a critical factor in Orlando's growth and evolution and must be included in its vision of the future.

Orlando's vision will not only be implemented by government employees and elected officials – citizens and community partnership are key. Orlando's vision will be implemented in great part by neighborhood organizations, Main Street organizations, non-profits, and community-based organizations. Their successes have grown as their capacity increases. Local partnerships and creative projects are critically important to providing innovative choices in housing, social services, the arts, and environmental awareness. The City will continue to look for ways to foster positive community development and involvement.



CLOSING THOUGHTS ON ORLANDO'S VISION

Orlando's vision for the future is noble, and the stakes are high. Through this document, Orlando will continue to work toward a strong, regionally focused growth-management program that recognizes Orlando's historic and future role as the Central Florida region's residential, employment, and cultural core.

The City of Orlando is and will remain a strong advocate for a rational, resilient, and sustainable urban form, and will work closely with its regional partners to ensure that we provide future generations with a high quality of life with both a strong built environment and social environment, and that we remain a 'community for a lifetime'.



Our Community Trends – Summary of 2050 Growth Projections

The following summary of the GMP 2024-2050 Growth Projections Report provides land use, population, and employment data for the City of Orlando, including past trends, current estimates, and projections for the future to the year 2050. The projections are used primarily for transportation modeling, particularly in support of regional transportation planning efforts. The projections are also used in level of service (capacity) analyses for transportation, parks, stormwater, solid waste, potable water, wastewater, fire and police, and schools.

Related to these services, the projections are used in the City's Concurrency Management System, and in budgeting and capital improvement programming. Finally, the City publishes these growth projections and other demographic information for use by individual citizens, citizen groups, consultants, and businesses.

By forecasting a specific quantity of new development and redevelopment in the future, the City can ensure that adequate public facilities will be in place when that development is built. Growth projections are important to ensure that the GMP continues to reflect current development trends and economic conditions. The GMP 2024-2050 Growth Projections Report contains a detailed methodology and assumptions used in creating the following summary, including a description of both residential and employment control numbers.



PAST TRENDS – POPULATION & LAND AREA

Since its incorporation in 1875, Orlando has grown significantly in terms of land area, population, employment, and influence in the Central Florida region. In 1875, Orlando comprised a 1 square mile area with a population of only a hundred or so. Orlando made its first official demographics appearance in the United States Census of 1890. At that time, Orlando had a population of 2,856 persons. For comparison, Jacksonville was the largest city in the state of Florida with a total population of 17,201, Tampa had 5,532 persons, and the City of Miami did not yet exist. Orlando experienced a population loss in 1900 due to the great freeze of 1895, lowering the population to 2,481. However, from 1910 through 2020, the City of Orlando grew steadily from a small town to a large city (please see Figure V-1).

Figure V-1: Orlando and Orange County Historical Population

| Year | City of Orlando | % Growth | Orange County | % Growth | % of Orange County Population |
|------|-----------------|----------|---------------|----------|-------------------------------|
| 1890 | 2,856 | N/A | 12,584 | N/A | 22.7% |
| 1900 | 2,481 | -13.13% | 11,374 | -9.62% | 21.8% |
| 1910 | 3,894 | 56.95% | 19,107 | 67.99% | 20.4% |
| 1920 | 9,282 | 138.37% | 19,890 | 4.10% | 46.7% |
| 1930 | 27,330 | 194.44% | 49,737 | 150.06% | 54.8% |
| 1940 | 36,736 | 34.42% | 70,074 | 40.89% | 52.4% |
| 1950 | 52,367 | 42.55% | 114,950 | 64.04% | 45.6% |
| 1960 | 88,135 | 68.30% | 263,540 | 129.26% | 33.4% |
| 1970 | 99,006 | 12.33% | 344,311 | 30.65% | 28.7% |
| 1980 | 128,291 | 29.58% | 470,865 | 36.76% | 27.2% |
| 1990 | 164,693 | 28.37% | 677,491 | 43.88% | 24.3% |
| 2000 | 185,951 | 12.91% | 896,344 | 32.30% | 20.7% |
| 2010 | 238,300 | 28.15% | 1,145,956 | 27.85% | 20.8% |
| 2020 | 307,573 | 29.07% | 1,429,908 | 24.78% | 21.5% |

Source: U.S. Census, Various Years

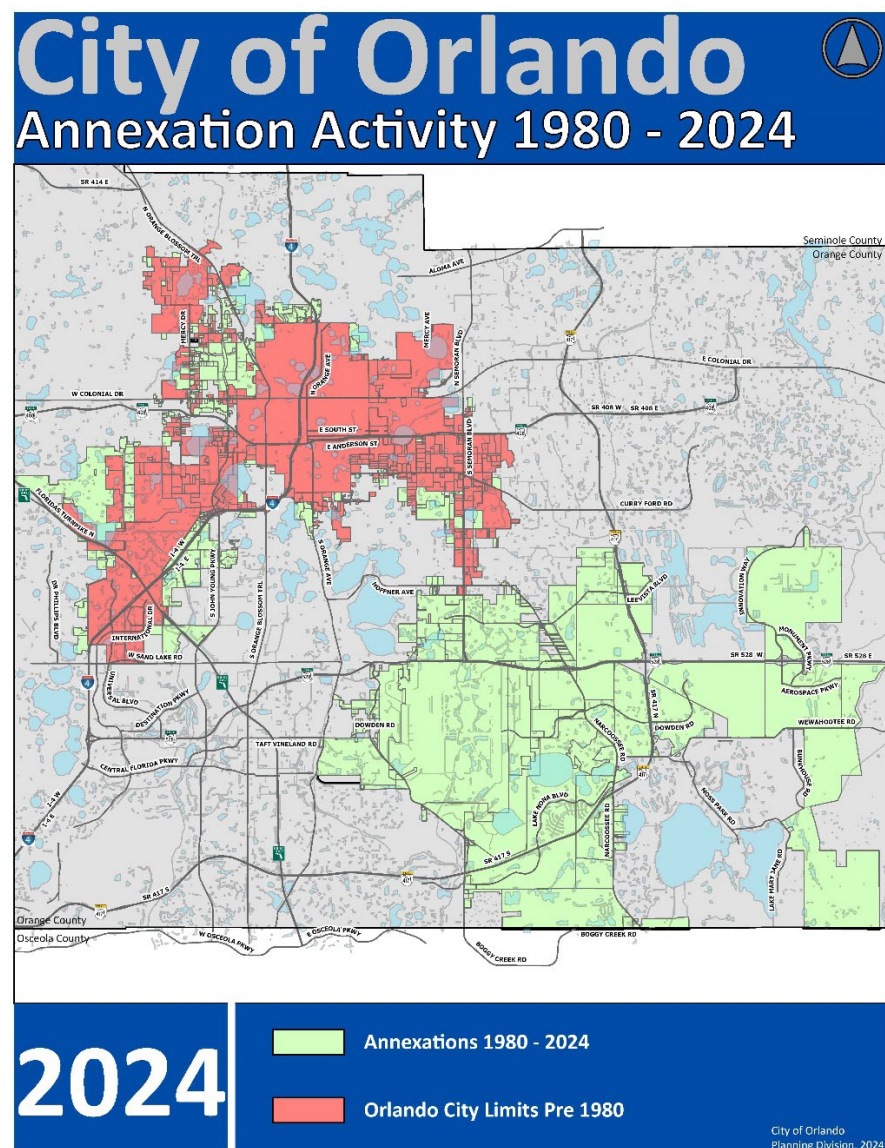
Since 1980, the City has experienced a great deal of growth in land area as the result of numerous annexations. Figure V-2a below shows the City's growth in acres, square miles and resident population per square mile. Figure V-2b is a map showing the areas where recent annexation activity has taken place.

According to these figures, Orlando's land area increased by **60,439 acres (94.44 square miles)** between 1980 and 2024. Much of this acreage consists of the Orlando International Airport property, as well as properties within the Southeast Orlando Sector Plan/Lake Nona, Vista East, Storey Park, Starwood/Meridian Parks, Sunbridge, and Camino areas in southeast Orlando.

Figure V-2a: City Dimensions and Population Per Square Mile

| Year | Acres | Square Miles | Population | Population Per Square Mile |
|------|--------|--------------|------------|----------------------------|
| 1980 | 27,624 | 43.16 | 128,291 | 2,972 |
| 1990 | 46,196 | 72.18 | 164,693 | 2,282 |
| 2000 | 65,888 | 102.95 | 185,951 | 1,806 |
| 2010 | 71,422 | 111.60 | 238,300 | 2,135 |
| 2020 | 75,906 | 118.60 | 307,573 | 2,593 |
| 2024 | 88,063 | 137.60 | 334,490 | 2,431 |

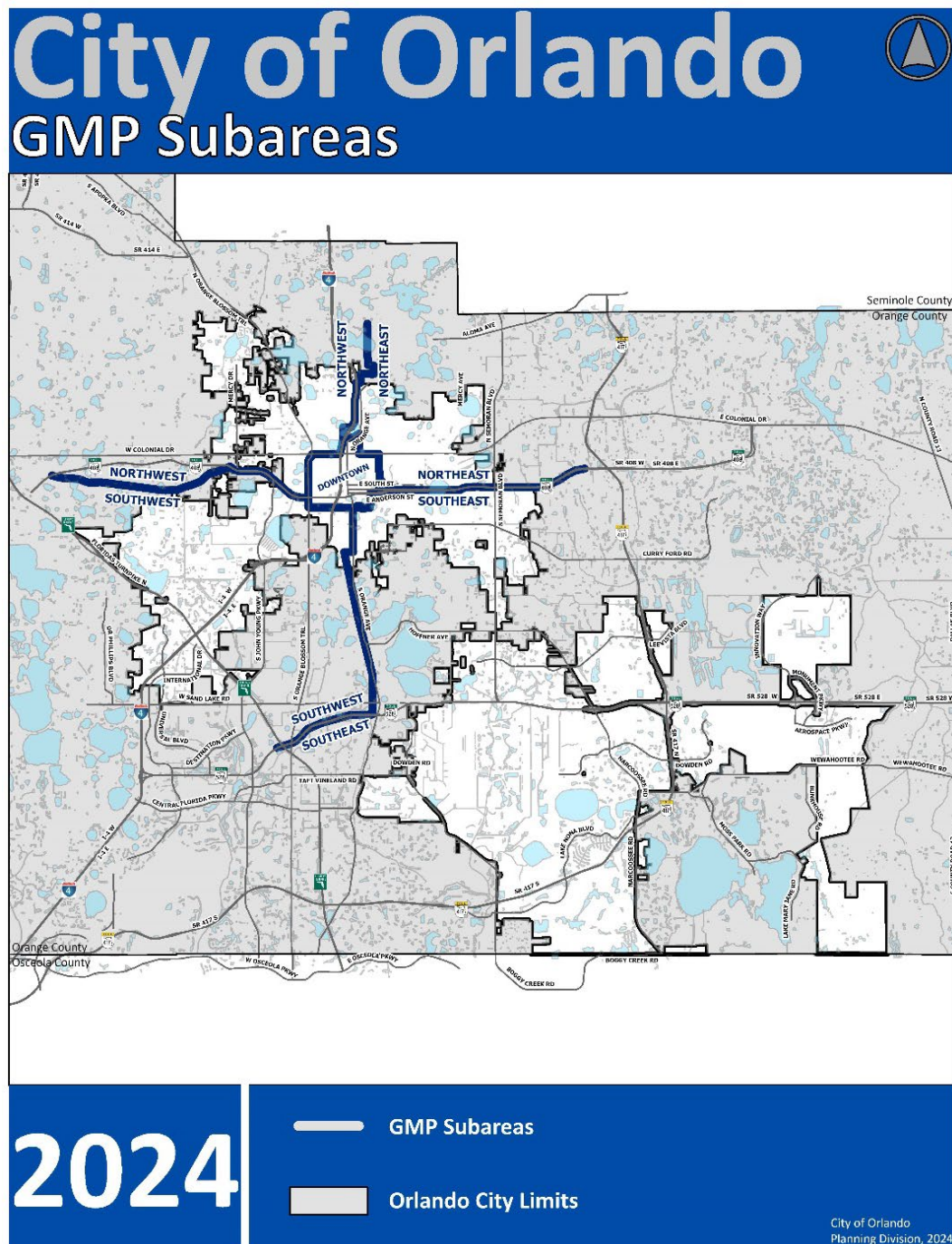
Figure V-2b – Annexation Activity from 1980 through 2024



RESIDENTIAL LAND USE AND POPULATION ESTIMATES & PROJECTIONS

The following figures summarize the projected single-family and multifamily dwelling unit growth, and resident population growth, between 2024 and 2050 for each GMP subarea and for the City of Orlando as a whole. Figure V-3 below depicts the five GMP subareas referenced in the GMP 2024-2050 Growth Projections Report.

Figure V-3: Growth Management Plan (GMP) Subareas



**Figure V-4: Summary of Single-Family Residential Dwelling Unit Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Units) | Change/Growth 2024-2050 (%) |
|----------------------|-----------------|---------------|---------------------------------------|--------------------------------|
| Northwest | 7,925 | 8,373 | 448 | 5.65% |
| Northeast | 6,247 | 6,270 | 23 | 0.37% |
| Downtown | 1,005 | 1,020 | 15 | 1.49% |
| Southwest | 8,216 | 8,216 | 0 | 0.00% |
| Southeast | 22,194 | 41,097 | 18,903 | 85.17% |
| Orlando Total | 45,587 | 64,976 | 19,389 | 42.53% |

**Figure V-5: Summary of Multifamily Residential Dwelling Unit Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Units) | Change/Growth 2024-2050 (%) |
|----------------------|-----------------|----------------|---------------------------------------|--------------------------------|
| Northwest | 9,676 | 21,923 | 12,247 | 126.57% |
| Northeast | 9,188 | 14,882 | 5,694 | 61.97% |
| Downtown | 15,493 | 25,607 | 10,114 | 65.28% |
| Southwest | 36,059 | 41,871 | 5,812 | 16.12% |
| Southeast | 36,963 | 58,643 | 21,680 | 58.65% |
| Orlando Total | 107,379 | 162,296 | 54,917 | 54.14% |

**Figure V-6: Summary of Resident Population Growth
By Subarea from 2024 to 2050 (“Bottom-Up” from Traffic Zones)**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (People) | Change/Growth 2024-2050 (%) |
|----------------------|-----------------|----------------|--|--------------------------------|
| Northwest | 39,772 | 66,188 | 26,416 | 66.42% |
| Northeast | 34,716 | 46,546 | 11,830 | 34.08% |
| Downtown | 25,204 | 40,633 | 15,429 | 61.22% |
| Southwest | 97,521 | 109,541 | 12,020 | 12.33% |
| Southeast | 135,089 | 232,973 | 97,884 | 72.46% |
| Orlando Total | 332,302* | 495,881 | 163,579 | 49.23% |

** Per the University of Florida’s Bureau of Economic & Business Research (BEBR), Orlando’s official population estimate for April 1, 2024 was 334,900.*

Single family units are defined as detached units irrespective of ownership. Multifamily is defined as an attached residential unit and can include both owner-occupied and renter-occupied types (i.e., duplexes, tri-and quadruplex, townhomes, condos, and apartments including accessory dwelling units, or ADUs). Associated maps graphically depict population growth for the same timeframe.

New single-family growth will occur primarily in the Vista East, Southeast Orlando Sector Plan including Lake Nona, Starwood/Meridian Parks, Storey Park, Sunbridge, and Camino portions of the southeast subarea with $\pm 18,903$ units to be built within the next 26 years. Multifamily dwelling unit growth is anticipated to be spread throughout the City and concentrated in mixed use activity centers and mixed use corridors, with significant growth associated with the RoseArts and Packing District Planned Developments in the northwest, the redevelopment of the Fashion Square Mall site in the northeast, high density projects in the Downtown including Creative Village, new apartment projects near International Drive and the attractions area in the southwest, and in the southeast area which includes the Lake Nona Town Center along with apartment projects along the Narcoossee Road corridor. All in all, it is anticipated that an additional $\pm 54,917$ multifamily units will be constructed in Orlando between 2024 and 2050.

Figure V-7 below depicts existing resident population distribution as of January 1, 2024, while Figure V-8 shows projected cumulative population growth through the year 2050. These figures identify which areas of the City have, or are projected to have, higher concentrations of resident population as compared to other areas of Orlando.

Existing resident population is located throughout the City, with particularly high concentrations in the central Traditional City neighborhoods, inner-ring suburbs, outer suburbs such as MetroWest, Rosemont, and along the Semoran Boulevard and Kirkman Road corridors.

Significant population growth is anticipated within the RoseArts and Packing District Planned Developments in the northwest, Downtown Orlando, and in the attractions area near International Drive. By far, the largest amount of population growth ($\pm 97,884$ people) will occur in the southeast area which includes the Vista Park, Starwood/Meridian Parks, Storey Park, Sunbridge, Camino, and Lake Nona Planned Developments. It is anticipated that Orlando's overall population will increase by $\pm 163,579$ people between 2024 and 2050, a 49.23% increase.

Please see Appendices A and B of the GMP 2024-2050 Growth Projections Report for traffic analysis zone specific residential dwelling unit and population projections.

City of Orlando

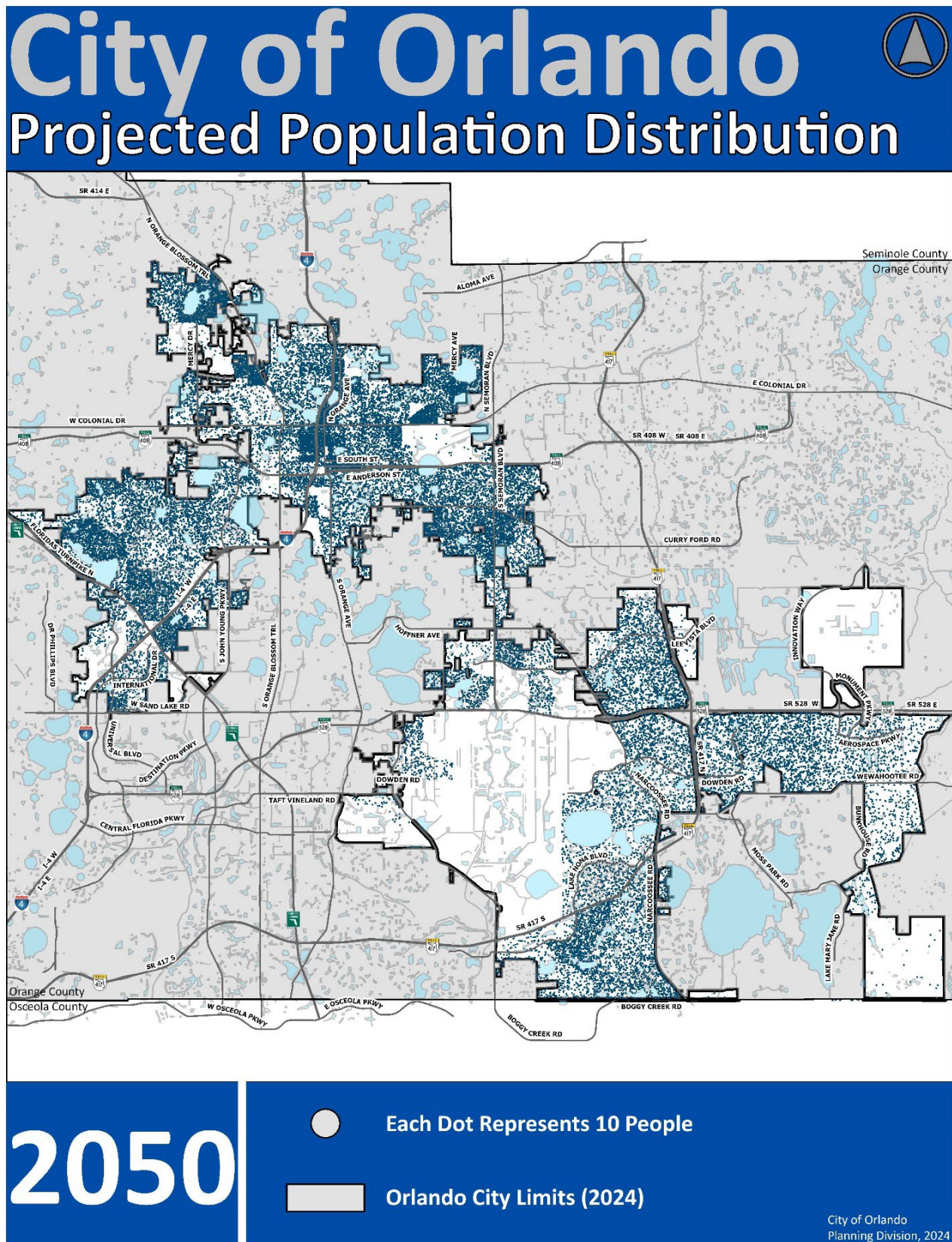
Existing Population Distribution

Each Dot Represents 10 People

Orlando City Limits (2024)

City of Orlando
Planning Division, 2024

Figure V-8: Projected Resident Population Distribution – Year 2050



NON-RESIDENTIAL LAND USE AND EMPLOYMENT ESTIMATES & PROJECTIONS

The following figures summarize projected office, retail, hotel, industrial, hospital, and civic/government growth, as well as employment growth, between 2024 and 2050 for each GMP sub-area and for the City of Orlando as a whole. Associated maps graphically depict employment growth for the same timeframe. Please see Appendices C through I of the GMP 2024-2050 Growth Projections Report for traffic analysis zone specific non-residential and employment projections.

**Figure V-9: Summary of Office Space Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Sq. Ft.) | Change/Growth 2024-2050 (%) |
|----------------------|-------------------|-------------------|---|--------------------------------|
| Northwest | 2,871,612 | 3,669,866 | 798,254 | 27.80% |
| Northeast | 5,225,399 | 6,609,422 | 1,384,023 | 26.49% |
| Downtown | 15,185,279 | 17,081,413 | 1,896,134 | 12.49% |
| Southwest | 8,001,177 | 8,642,995 | 641,818 | 8.02% |
| Southeast | 5,699,325 | 12,948,621 | 7,249,296 | 127.20% |
| Orlando Total | 36,982,792 | 48,952,317 | 11,969,525 | 32.37% |

**Figure V-10: Summary of Retail Space Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Sq. Ft.) | Change/Growth 2024-2050 (%) |
|----------------------|-------------------|-------------------|---|--------------------------------|
| Northwest | 3,454,374 | 4,218,088 | 763,714 | 22.11% |
| Northeast | 5,404,293 | 4,972,029 | -432,264 | -7.80% |
| Downtown | 2,370,771 | 3,022,997 | 652,226 | 27.51% |
| Southwest | 15,587,532 | 15,972,550 | 385,018 | 2.47% |
| Southeast | 6,954,028 | 11,679,528 | 4,725,500 | 67.92% |
| Orlando Total | 33,770,998 | 39,865,192 | 6,094,194 | 18.05% |

**Figure V-11: Summary of Hotel Room Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Rooms) | Change/Growth 2024-2050 (%) |
|----------------------|-----------------|---------------|---------------------------------------|--------------------------------|
| Northwest | 880 | 525 | -355 | -40.34% |
| Northeast | 390 | 810 | 420 | 107.69% |
| Downtown | 2,264 | 3,566 | 1,302 | 57.51% |
| Southwest | 20,443 | 21,587 | 1,144 | 5.60% |
| Southeast | 6,124 | 12,374 | 6,250 | 102.06% |
| Orlando Total | 30,101 | 38,862 | 8,761 | 29.11% |

**Figure V-12: Summary of Industrial Space Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Sq. Ft.) | Change/Growth 2024-2050 (%) |
|----------------------|-------------------|-------------------|---|--------------------------------|
| Northwest | 15,339,793 | 15,664,605 | 324,812 | 2.12% |
| Northeast | 1,916,963 | 1,844,176 | -72,787 | -3.80% |
| Downtown | 1,700,369 | 1,526,453 | -173,916 | -10.23% |
| Southwest | 14,207,770 | 15,027,949 | 820,179 | 5.78% |
| Southeast | 20,456,057 | 52,185,504 | 31,729,447 | 155.11% |
| Orlando Total | 53,620,952 | 86,248,687 | 32,627,735 | 60.85% |

**Figure V-13: Summary of Hospital Space Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Sq. Ft.) | Change/Growth 2024-2050 (%) |
|----------------------|------------------|-------------------|---|--------------------------------|
| Northwest | 310,897 | 321,757 | 10,860 | 3.49% |
| Northeast | 2,788,440 | 3,738,440 | 950,000 | 34.07% |
| Downtown | 117,194 | 117,194 | 0 | 0% |
| Southwest | 2,656,947 | 3,813,365 | 1,156,418 | 43.52% |
| Southeast | 2,116,475 | 5,214,144 | 3,097,669 | 146.36% |
| Orlando Total | 7,989,953 | 13,204,900 | 5,214,947 | 65.27% |

**Figure V-14: Summary of Civic/Government Space Growth
By Subarea from 2024 to 2050**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Sq. Ft.) | Change/Growth 2024-2050 (%) |
|----------------------|-------------------|-------------------|---|--------------------------------|
| Northwest | 2,691,581 | 3,090,606 | 399,025 | 14.82% |
| Northeast | 1,913,283 | 2,108,868 | 195,585 | 10.22% |
| Downtown | 4,988,347 | 5,247,427 | 259,080 | 5.20% |
| Southwest | 3,743,099 | 3,830,872 | 87,773 | 2.34% |
| Southeast | 9,403,652 | 13,992,371 | 4,588,719 | 48.80% |
| Orlando Total | 22,739,962 | 28,270,144 | 5,530,182 | 24.32% |

**Figure V-15: Summary of Employment Growth
By Subarea from 2024 to 2050 (“Bottom-Up” from Traffic Zones)**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (Employees) | Change/Growth 2024-2050 (%) |
|----------------------|-----------------|----------------|---|--------------------------------|
| Northwest | 32,618 | 36,937 | 4,319 | 13.24% |
| Northeast | 39,681 | 46,480 | 6,799 | 17.13% |
| Downtown | 54,105 | 61,425 | 7,320 | 13.53% |
| Southwest | 88,162 | 96,338 | 8,176 | 9.27% |
| Southeast | 84,242 | 178,211 | 93,968 | 111.55% |
| Orlando Total | 298,808 | 419,391 | 120,583 | 40.36% |

Figure V-16 below depicts existing employment distribution as of January 1, 2024, while Figure V-17 shows projected cumulative employment growth through the year 2050. These figures identify which areas of the City have, or are projected to have, higher concentrations of employment as compared to other areas of Orlando.

Existing employment is located throughout the City, with particularly high concentrations in the Downtown, Advent Health campus in the northwest, Orlando Health campus south of Downtown, in the attractions area along International Drive, and around the Orlando International Airport. A tremendous amount of employment growth is expected in the Southeast Orlando Sector Plan area which includes the Orlando International Airport, the East Airfield Planned Development, the Lake Nona Town Center & Mixed Use District, Lake Nona/Medical City, along with the Sunbridge and International Corporate Park projects. In the Southeast alone, employment is projected to increase by over ±93,968 jobs between 2024 and 2050, representing a 111.55% increase.

City of Orlando

Existing Employment Distribution

2024

Each Dot Represents 10 People

Orlando City Limits (2024)

City of Orlando
Planning Division, 2022

City of Orlando

Projected Employment Distribution

Each Dot Represents 10 People

Orlando City Limits (2024)

2050

City of Orlando
Planning Division, 2024

SERVICE POPULATION ESTIMATES & PROJECTIONS

Although the University of Florida’s BEBR prepares current resident population estimates for the City of Orlando, they do not prepare estimates for what the City refers to as “service population”, which includes all those people that may have an impact on City services during any given day. This “service population” (or daytime population), while somewhat difficult to estimate, is much larger than Orlando’s resident population and includes tourists, the homeless, and employees (over and above resident employees) that travel to and work in the City during any given day. Service population has an impact on all infrastructure services, particularly Fire and Police. Figure V-18 summarizes the City’s service population projections for the period 2024-2050. More detailed estimates and projections by traffic analysis zone are presented in Appendix J of the GMP 2024-2050 Growth Projections Report.

**Figure V-18: Summary of Service Population Growth
By Subarea from 2024 to 2050 (“Bottom-Up” from Traffic Zones)**

| | January 1, 2024 | 2050 | Change/Growth 2024-2050 (People) | Change/Growth 2024-2050 (%) |
|----------------------|-----------------|----------------|--|--------------------------------|
| Northwest | 49,558 | 76,820 | 27,282 | 55.01% |
| Northeast | 45,531 | 59,766 | 14,235 | 31.26% |
| Downtown | 69,707 | 92,912 | 23,205 | 33.29% |
| Southwest | 149,154 | 164,942 | 15,788 | 10.59% |
| Southeast | 166,078 | 297,182 | 131,104 | 78.94% |
| Orlando Total | 480,028 | 691,622 | 211,594 | 44.08% |

Significant growth in service population is expected in the northwest with the build-out of projects such as the RoseArts PD and Packing District PD, and in the northeast with growth associated with the Advent Health campus and redevelopment of Orlando Fashion Square Mall. Downtown Orlando’s service population will increase with continued build-out of Creative Village and significant growth in office space and hotel rooms throughout the Central Business District. In the southwest, it is anticipated that service population will increase with commercial and hotel growth associated with major attractions such as Universal Studios. By far, the greatest amount of service population growth ($\pm 131,104$) will occur with the continued development in the Southeast area including expansion of the Orlando International Airport, including the East Airfield Planned Development, Lake Nona, and development of the recently annexed Sunbridge, Camino, and International Corporate Park properties. Overall, it is anticipated that service population will grow by $\pm 211,594$ between 2024 and 2050.

Comprehensive Plan Requirements of Chapter 163, Florida Statutes

Originally adopted in 1991, Orlando's Growth Management Plan has been updated for the planning horizon of 2050. This update complies with the requirements of Chapter 163.3177, Florida Statutes, and provides data and analysis related to projected growth and demand for services throughout the planning period.

Orlando's GMP, like all local government comprehensive plans in the State of Florida, is designed to guide and balance the future economic, social, physical, environmental, and fiscal management of development and redevelopment within the corporate limits of the City of Orlando.

These goals, objectives, policies (GOPs), and figures reflect our community's commitment to implement the GMP and are used to conscientiously guide future decisions, programs, and activities to ensure that the plan is implemented. It is not the intent of the GMP to include implementing regulations, but rather to outline and identify the programs, activities, and land development regulations that form the overall strategy for implementing the plan.

How To Use This Plan

Orlando's 2050 Growth Management Plan is structured to reflect our community's vision with each of the Chapter 163, F.S. – required Elements, as well as several optional Elements, being consolidated into the following Chapters:

Chapter 1 – Vision Statement & Introduction provides Orlando's overall community vision, and a summary of the GMP 2024-2050 Growth Projections Report.

Chapter 2 – A Vibrant, Livable, and Inclusive Community integrates the Future Land Use, Housing, Preservation & Design, Parks, Recreation & Open Space, Cultural Arts, and Property Rights Elements to support a healthy, age-friendly, future-ready, and inclusive quality of life.

Chapter 3 – Safe and Convenient Mobility Options focuses on the various modes of transportation necessary for the efficient movement of people and goods, but with a special emphasis on safety.

Chapter 4 – Efficient and Well-Maintained Infrastructure brings together the provision of urban services including the Stormwater & Aquifer Recharge, Potable Water, Wastewater (Water Reclamation), and Solid Waste Elements all focused on protecting the quality and quantity of our surface waters and groundwaters.

Chapter 5 – A Beautiful and Environmentally-Friendly Community includes the Conservation Element which emphasizes the protection and preservation of the natural environment as well as sustainability and resiliency.

Chapter 6 – Responsible and Accessible Government consists of the high standard the City holds itself to in communicating with its citizens and other governmental agencies through the Capital Improvements, Intergovernmental Coordination, and Public School Facilities Elements. This chapter also includes a monitoring and evaluation section.

Technical Support Document includes a list of the materials used to inform the development of Orlando’s 2050 Growth Management Plan. These varied resources have been consolidated into one convenient location at Orlando.gov.



The following cross-reference table provides a summary of the required elements according to Chapter 163, F.S., and where to find each element in the plan:

| Chapter 163, F.S. Reference | Required or Optional | Location By Plan Chapter |
|---|----------------------|--------------------------|
| 163.3177(3)(a) – Capital Improvements | Required | Chapter 6 |
| 163.3177(6)(a) – Future Land Use | Required | Chapter 2 |
| 163.3177(6)(b) – Transportation | Required | Chapter 3 |
| 163.3177(6)(c) – Sanitary Sewer | Required | Chapter 4 |
| 163.3177(6)(c) – Solid Waste | Required | Chapter 4 |
| 163.3177(6)(c) – Drainage | Required | Chapter 4 |
| 163.3177(6)(c) – Potable Water | Required | Chapter 4 |
| 163.3177(6)(c) – Natural Groundwater Aquifer Recharge | Required | Chapter 4 |
| 163.3177(6)(d) – Conservation | Required | Chapter 5 |
| 163.3177(6)(e) – Parks, Recreation and Open Space | Required | Chapter 2 |
| 163.3177(6)(f) – Housing | Required | Chapter 2 |
| 163.3177(6)(g) – Coastal Management | Not Applicable | Not Applicable |
| 163.3177(6)(h) – Intergovernmental Coordination | Required | Chapter 6 |
| 163.3177(6)(h) and 163.31777 – Public School Facilities | Required | Chapter 6 |
| 163.3177(6)(i) – Property Rights | Required | Chapter 2 |
| 163.3177(1)(d) – Monitoring and Evaluation | Required | Chapter 6 |
| N/A – Preservation & Design | Optional | Chapter 2 |
| N/A – Cultural Arts | Optional | Chapter 2 |

Each Chapter consists of the following sections:

- **Vision** – An overarching goal statement that provides our vision for the Chapter, weaving all the Elements together into a cohesive whole.
- **Guidance** – The documents, plans, regulations, and policies that influence each Element of the Plan including the data and analysis requirement citations specified in Chapter 163, Florida Statutes.
- **Trends** – The current and anticipated conditions that influence each Element of the Plan including all relevant data and analysis.
- **Adopted Goals, Objectives, Policies (GOPs), and Figures (including Maps)** – The adopted regulatory guidance of each Element of the Plan. This section of each Chapter, coupled with the adopted Future Land Use Map and Map Series, meets the legal requirements of Chapter 163, F.S.

The GMP has been formatted in this way so that people can better understand the direct relationship between the Vision > Guidance > GOPs & Figures/Maps, and simply to make the document more readable and user-friendly.

The Chapters and individual Elements of Orlando's 2050 Growth Management Plan work together to guide new development and redevelopment, as well as the provision and coordination of services while protecting natural resources and enhancing the quality of life for all residents of the City through the year 2050. No single Element, Goal, Objective, Policy or Figure should be considered in isolation; rather, they should be considered as part of a whole to achieve Orlando's overall community vision.

Interpretation

Shall; Must; May; Includes

The words "shall" or "must" are mandatory if included in an adopted goal, objective, or policy; the word "should" is directive but not necessarily mandatory; the word "may" is permissive. The word "includes" does not limit a term to specific examples, but is intended to extend its meaning to all other instances and circumstances of like kind or character.

Interpretation of Undefined Terms

Terms not otherwise defined herein shall be interpreted first by reference to the City's GMP; second, by the City of Orlando Land Development Code (LDC); third, by reference to generally accepted engineering, planning, or other professional terminology if technical; and otherwise according to common usage, unless the context clearly indicates otherwise.

Definitions

City Planning Official (or Planning Official) – The City Planning Division Manager, or his or her designee.

Commercial use - Activities within land areas which are predominantly connected with the sale, rental and distribution of products, or the performance of services.

Conservation use - Activities within land areas whose boundaries have been designated by the conditions of a development order or other governmental action for the purpose of conserving or protecting natural resources or environmental quality.

Conventional LDC - The City of Orlando Land Development Code, as it may be amended from time to time (Chapters 58-67).

Educational use - See public, recreational and institutional use.

Industrial use - Activities within land areas predominantly connected with manufacturing, assembly, processing or storage of products.

Office use - Activities within land areas used predominantly for the conduct of business or occupation; however, commercial and industrial uses are not consistent in these areas.

Principal Use - The primary or predominant activity within a structure or land area, as distinguished from accessory or secondary activities.

Public, recreational and institutional use - Activities within areas used predominantly for structures or lands that are owned, leased or operated by a government entity or public/private partnership, educational uses such as public or private primary or secondary schools, vocational and technical schools, colleges and universities, or areas where public or private recreation occurs, or other public facilities or public benefit uses.

Recreational use - *See public, recreational and institutional use.*

Residential use - Activities within land areas used predominantly for housing.

Secondary use - An activity which occupies a clearly minor proportion of a structure or land area, as distinguished from the principal use of that structure or area.

Traditional Design - Land use and development standards that apply in the Southeast Orlando Sector Plan area, as described under Goal 4 of the Future Land Use Element and Chapter 68 of the Land Development Code.

Transportation Official – The Director of the Transportation Department, or his or her designee.