



“Your Source for New Construction Real Estate Information”
Serving Puget Sound, Portland Metro, Salem, Spokane and Boise

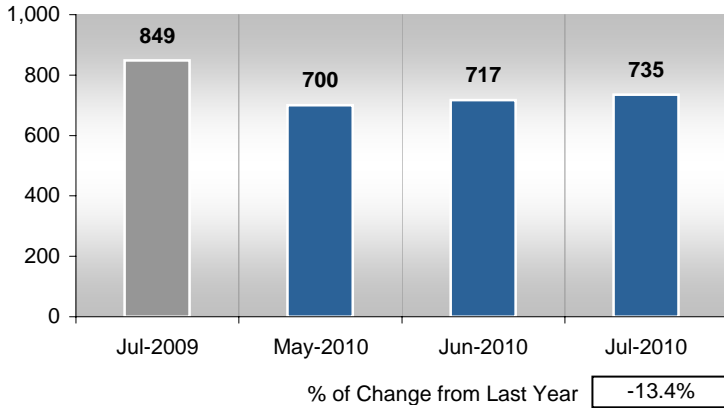


Monthly Monitor Report Portland Market, OR & WA August 2010

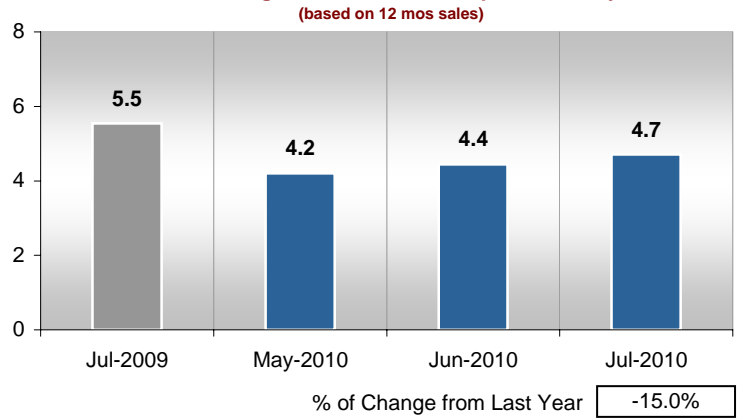
New Home Trends Inc. Monthly Monitor Portland (WA & OR) Market

New Construction - Single-Family Residential Real Estate

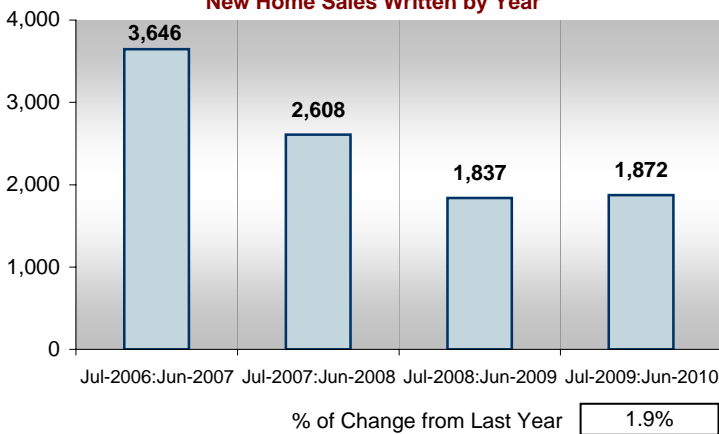
Unsold Available Spec Homes



Remaining Months of Unsold Spec Inventory



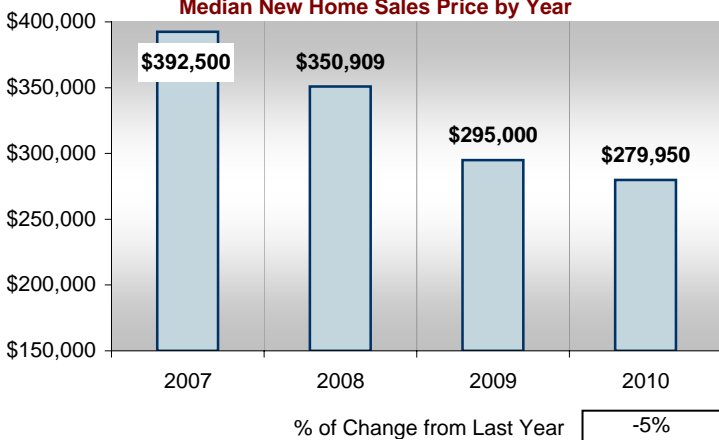
New Home Sales Written by Year



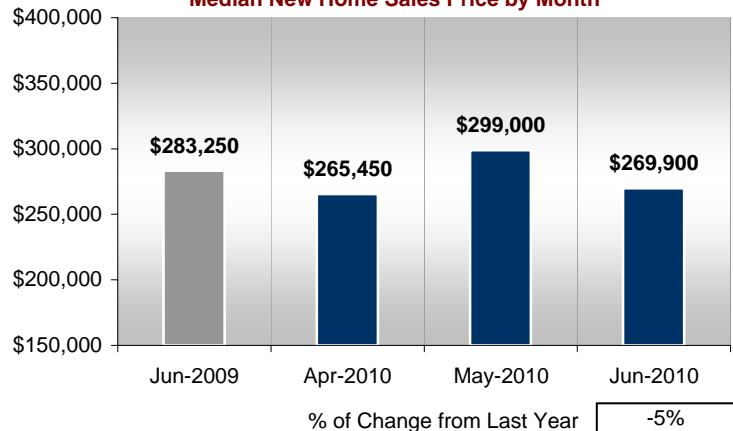
New Home Sales Written by Month



Median New Home Sales Price by Year

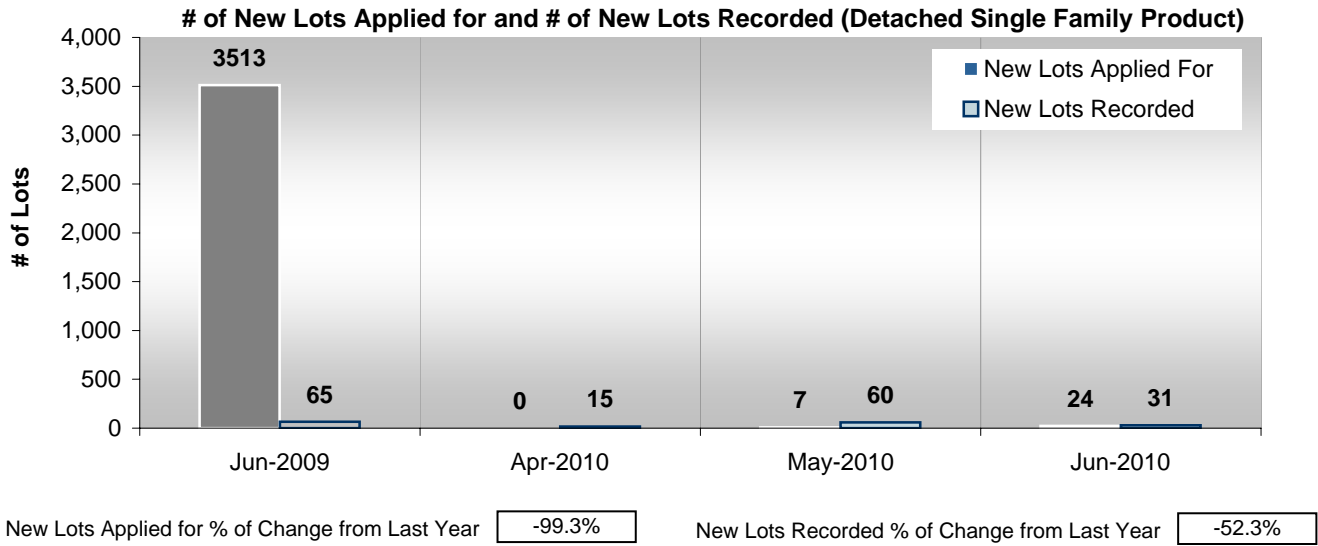


Median New Home Sales Price by Month

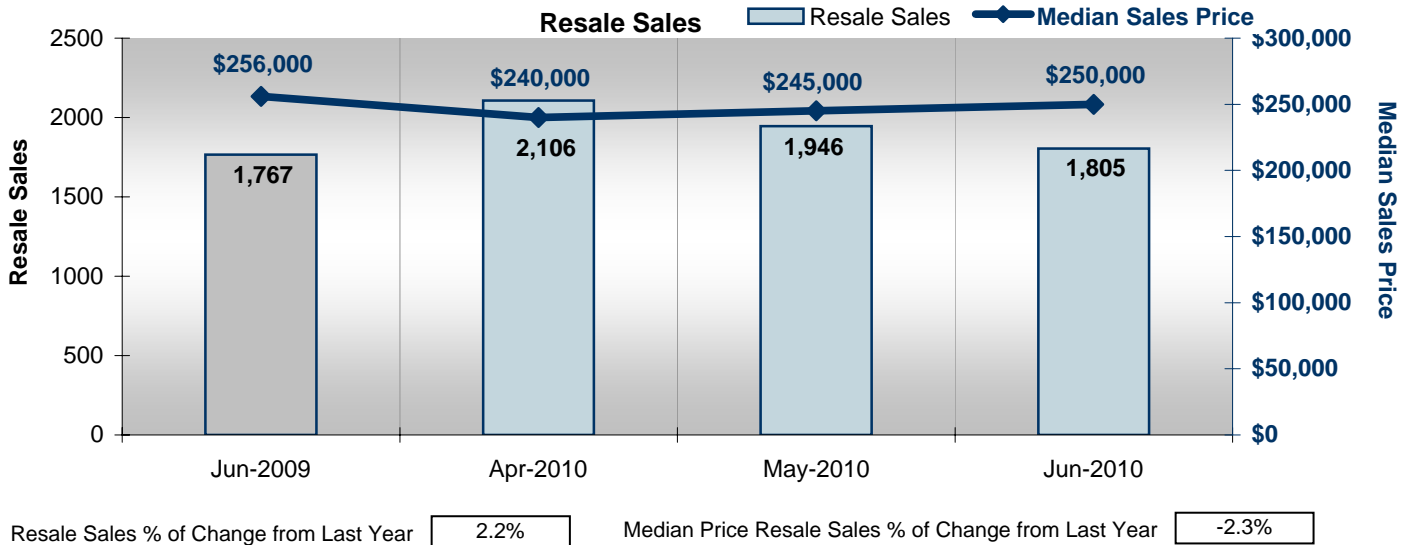


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New Construction - Single-Family Residential Real Estate

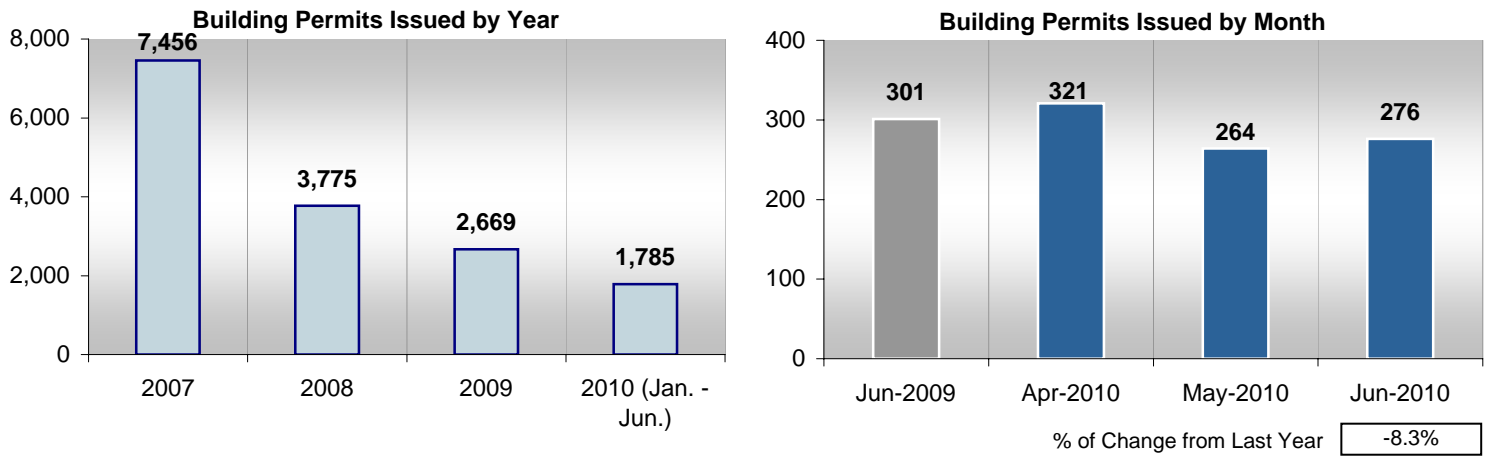


Resale - Single Family Residential Real Estate



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Single Family Building Permits Issued



Employment & Foreclosures

Unemployment Rate					
	Jun-09	Apr-10	May-10	Jun-10	Change from last year
Portland-Vancouver-Beaverton, OR-WA MSA	9.9	10.8	10.9	10.2	0.3

Employment					
	Jun-09	Apr-10	May-10	Jun-10	Change from last year
Portland-Vancouver-Beaverton, OR-WA MSA	1,061,360	1,037,691	1,031,740	1,036,308	-25,052
Change			-5,951	4,568	

Oregon State Foreclosures					
	Jun-09	Apr-10	May-10	Jun-10	Change from last year
Properties with Foreclosure Filings	3,113	3,813	3,146	3,843	23%
State Foreclosure Rank	14	23	25	22	-8

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Employment by Industry

Portland-Vancouver-Hillsboro MSA			
Industry	Jun-2009	Jun-2010	% of Change
Mining and logging	1,200	1,100	-8.3%
Construction	50,000	44,900	-10.2%
Manufacturing	107,500	105,100	-2.2%
Trade, transportation, and utilities	188,800	185,400	-1.8%
Information	23,000	21,900	-4.8%
Financial activities	64,400	62,300	-3.3%
Professional and business services	124,600	122,200	-1.9%
Educational and health services	133,000	131,700	-1.0%
Leisure and hospitality	95,600	94,300	-1.4%
Federal government	18,500	20,000	8.1%
State government	22,500	22,900	1.8%
Local government	110,000	110,100	0.1%

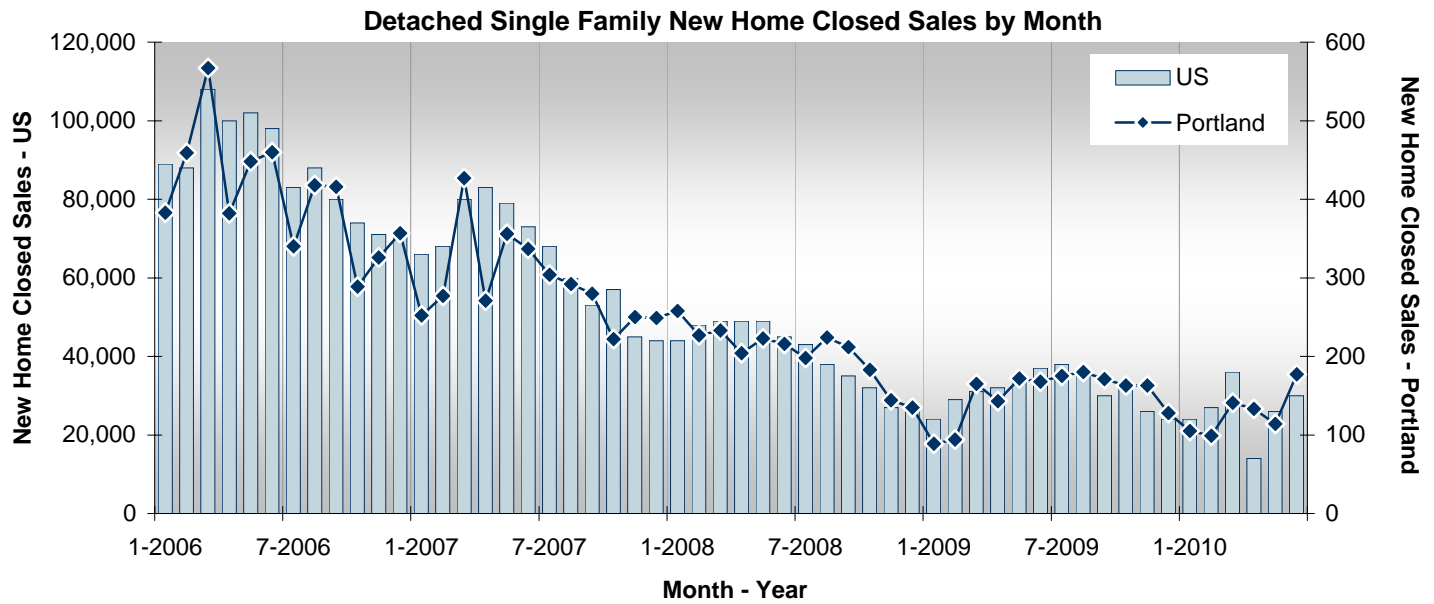
Source: Oregon Employment Department

Out of State Drivers Licenses Surrendered By County, By State of Origin (Jul-2009:Jun-2010)

From / To	Oregon	
	Total	Rank
California	16,799	1
Washington	9,749	2
Arizona	2,832	3
Idaho	2,248	4
Texas	2,002	5
Nevada	2,001	6
Colorado	1,816	7
Florida	1,582	8
Utah	1,288	9
Alaska	1,185	10
New York	1,054	
Illinois	1,020	
Michigan	1,000	
Montana	968	
Hawaii	901	
Ohio	789	
Minnesota	747	
Virginia	744	
Pennsylvania	730	
Missouri	668	

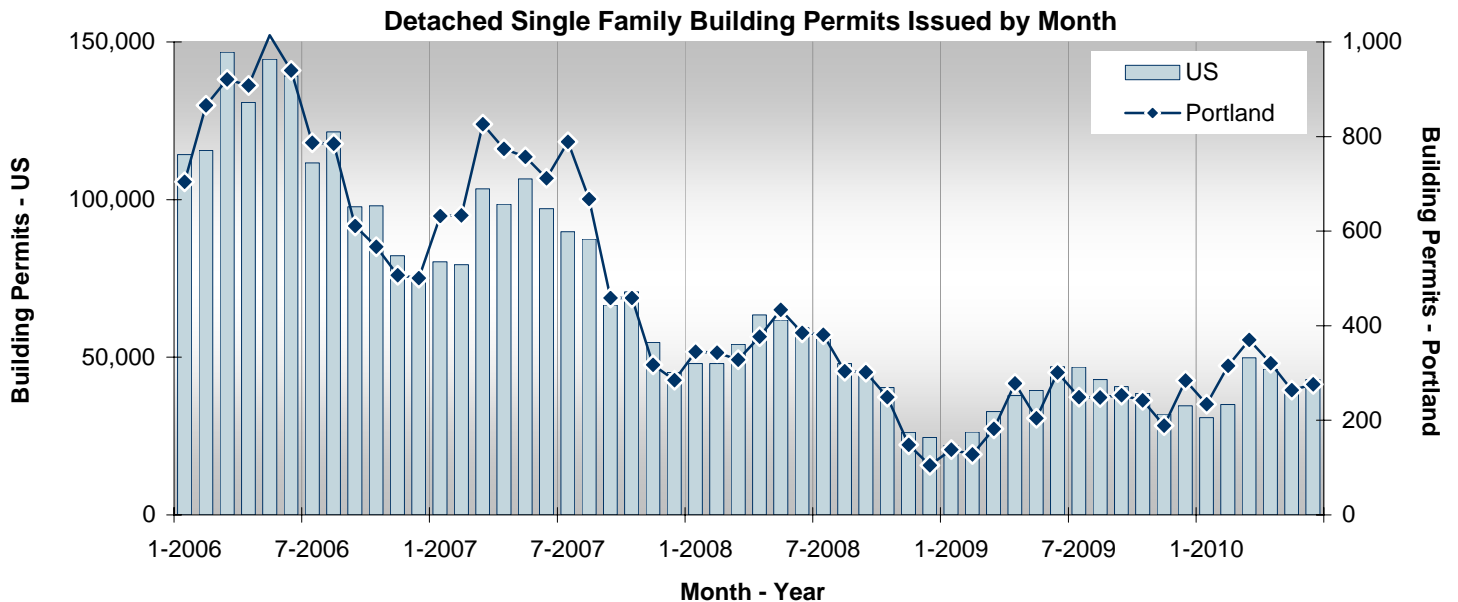
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Detached Single Family New Home Closed Sales - US and Portland



US Source: US Census, Portland Source: New Home Trends

Detached Single Family Building Permits Issued - US and Portland



Data Sources:

New Construction - New Home Trends Inc.
Resale - RMLS
Employment: Oregon Employment Department

Foreclosures: realtytrac.com
Drivers Licenses: Oregon Department of Transportation
Building Permits: U.S. Census Bureau



Company Profile



Data and Research - “Informed Choices - Not Chances”

If you are part of – or affected by – the residential real estate industry, NewHomeTrends will provide a competitive advantage to help you stay ahead of the market.

NewHomeTrends’ combination of expertise, experience and knowledge can help you gain confidence with virtually any development, building, or sales and marketing situation. Our team approach taps the talents of builders, developers, government officials, sales and marketing professionals, and financial institutions to give you a complete picture of the market.

It starts with an extensive database that is updated daily. NewHomeTrends tracks almost all data related to the residential building industry, including plat submittals/approvals, construction start dates, lot sizes, square footages, selling prices, amenities, sales and closings.

We gather this information the old-fashioned way; by personal, face-to-face contact with builders, realtors, and city and county officials. We have the “feet on the street” to search through jurisdiction records, visit sites, track published information, and conduct focus groups and other surveys.

By utilizing our website, you can access the most current information available regarding new residential construction 24/7. Our database is more comprehensive than ever, offering:

- Detailed information on residential new housing construction
- Complete tracking for each community from plat submittal to final closing
- Continual updates for active communities
- A comprehensive selection of reports for your business solutions.

Consulting and Custom Reporting – “If you don’t know, don’t build!”

Data itself is not knowledge. Knowledge comes from interpreting data and understanding how it might impact the real estate industry. Our experience, vision, and understanding of the marketplace allow us to provide both quantitative and qualitative reports and make realistic recommendations to our clients for successful projects.

We tell our clients what they *need* to hear, even if it isn’t what they *want* to hear. While this may not make us the most popular folks at the table, it certainly makes us among the most valuable.

NewHomeTrends Consulting Services

- | | | | |
|-----------------------------------|---|--|--|
| <i>Market Research</i> | <ul style="list-style-type: none">• Trend tracking• Absorption studies• Market intelligence• Market opportunity analysis• Pricing strategies• Feasibility analysis• Master plan strategies• Land acquisition consultation• Buyer identification | <i>Land Planning Assistance</i> | <ul style="list-style-type: none">• Lot sizing• Lot evaluation• Market segmentation• Phasing• Street layout• Entrance• Footprint–Placement• Amenities• Buyer identification• Absorption projection• Demographics |
| <i>Master Planned Communities</i> | <ul style="list-style-type: none">• Market segmentation• Competitive analysis• Phasing• Amenities research• Absorption projection prospective buyers• Team participation | <i>Consumer Attitude Surveys</i> | <ul style="list-style-type: none">• Exit surveys• Post closing surveys• Focus groups• New product acceptance• New home owner analysis |
| <i>Feasibility Studies</i> | <ul style="list-style-type: none">• Upside issues• Downside issues• Market niche targeting• Identification of buyer trends | <i>Product Development Analysis</i> | <ul style="list-style-type: none">• Site evaluation• Product evaluation• Marketing evaluation• Hourly consulting |
| | | <i>Marketing</i> | <ul style="list-style-type: none">• Specifications• Pricing strategy & phasing• Positioning, theme & image• Sales office |
| | <i>New Home Trends Is Committed To Providing The Best</i> | <ul style="list-style-type: none">• Team players• Extensive database• Flexibility• Market knowledge | |

Information you can build on!

New Home Trends Clients

We are pleased to have served large and small builders, major developers of master-planned communities, financial institutions, and others involved in the residential building industry. Some of the companies that have relied on us are:

Developers

Aoki Corporation
Finkbeiner Development
Intracorp
Jaquith Development
Jenamar
Marathon Development
Mt. Vernon Associates
Newland Communities
Northwest Commercial
Novastar Enterprises, Inc.
Olympic Resources
Olympic Property Group
Pacific Land Management
Pope Resources
Port Blakely Communities
Quadrant Land
Star Development
Triad
Tucci & Sons
Ueki America Corporation
Weyerhaeuser Real Estate Co.

Master Planned Communities

Cascadia
Harbor Ridge
Northwest Landing
Sunrise
Lakeland
Blakely Ridge
Klahanie
Northridge
Snoqualmie Ridge
Glen Eagle
Harbour Pointe
Port Ludlow
McCormick Woods
Meridian Campus
Thurston Highlands
Overlake in Utah
Briggs Village
Issaquah Highlands
The Lakes at Black Diamond
East Village
Port Gamble
Villbois

Redevelopment Projects

High Point
New Holly
Othello Station
Rainier Vista
Westpark

Builders

Arbor Homes
Bennett Homes
John F. Buchan Homes
Wm. Buchan Homes
Burnstead Construction
Brownstone Homes
Carino Homes
CamWest Development, Inc.
Centex
Conner Development
Crest Builders
Dally Development
Fortune Development
Capstone Homes, Inc.
Henderson Homes
Intracorp
J. Scott Development
Jefferson Homes
Lexington Fine Homes
Lozier Homes
Lyle Homes
McCaugherty Companies
Newhall Jones, Inc.
Pan-Terra Homes
Quadrant Homes
Shea Homes
Stafford Homes
Lancaster Homes
Wallace Properties
Willamette Builders Group
Triad

Sales and Marketing Companies

Windermere–Ryness
Team Builder–John L. Scott
Williams Marketing
Miller Condominium Marketing
Windermere On-Site

Public Offices, Financial Institutions and Others

Bank of America
City of Mercer Island
City of Renton
City of Tacoma
City of Kent
City of Everett
City of Seattle
Seattle EDC
Cohen Financial
Homestreet Bank
Resmark
Carlyle Group
Price Waterhouse
Renton School District
Threshold Housing
Master Builders Assoc. of Pierce County
Master Builders Assoc. of King & Snohomish Counties
Security Capital Pacific Trust
Hearthstone Advisors
Heartland
Schnitzer
Seattle First National Bank
Bremerton Housing Authority
Seattle Housing Authority
King County Housing Authority

Architectural Firms

Mithun
Rice Fergus Miller
GGLO