

Joint Base Cape Cod Cantonment Area Master Plan

Stakeholder Listening Sessions



Mass Development

May 2026

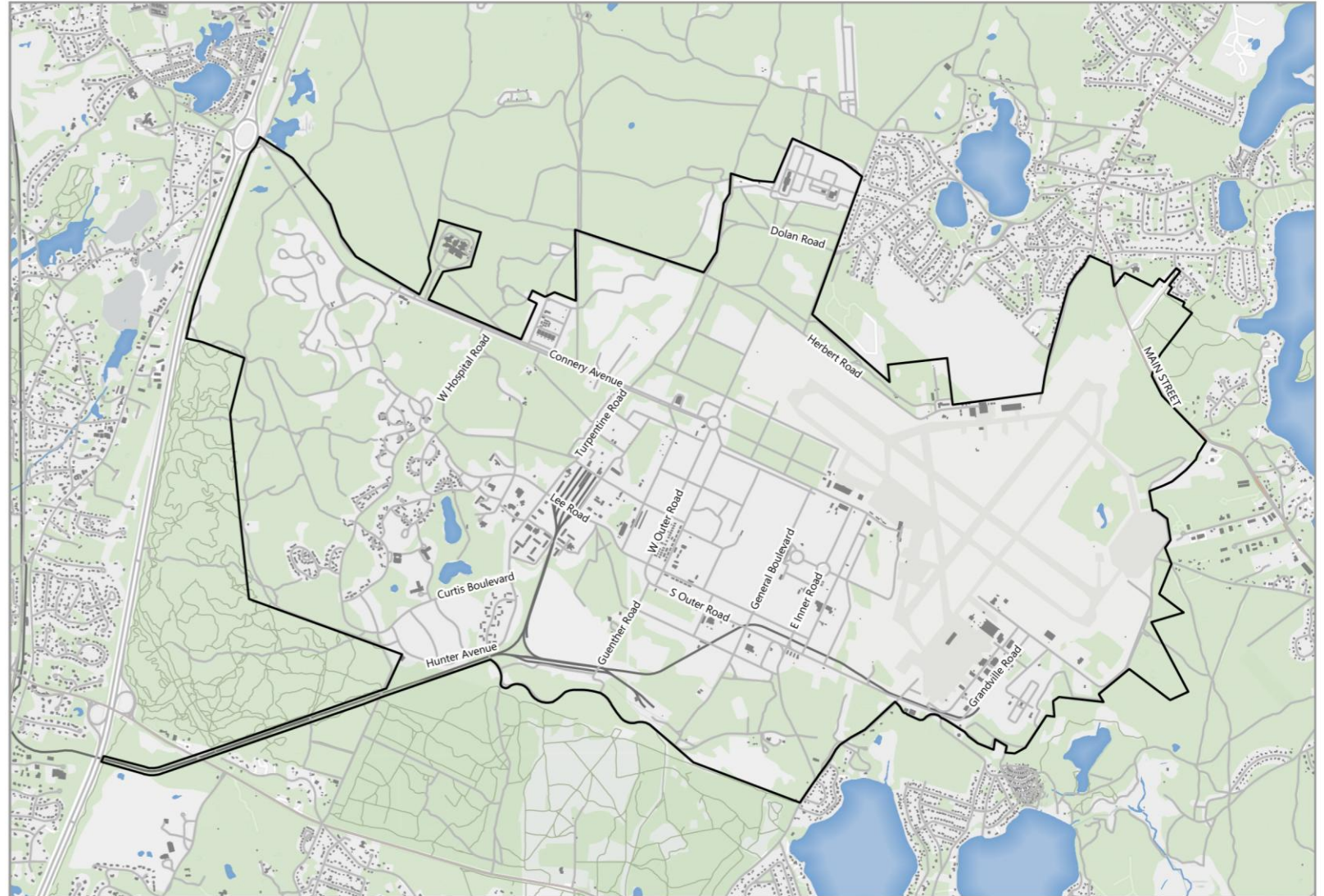
Project Purpose

Develop a **Cantonment Area Master Plan** to identify current and future spatial needs for the base and plan for redevelopment of any surplus property.

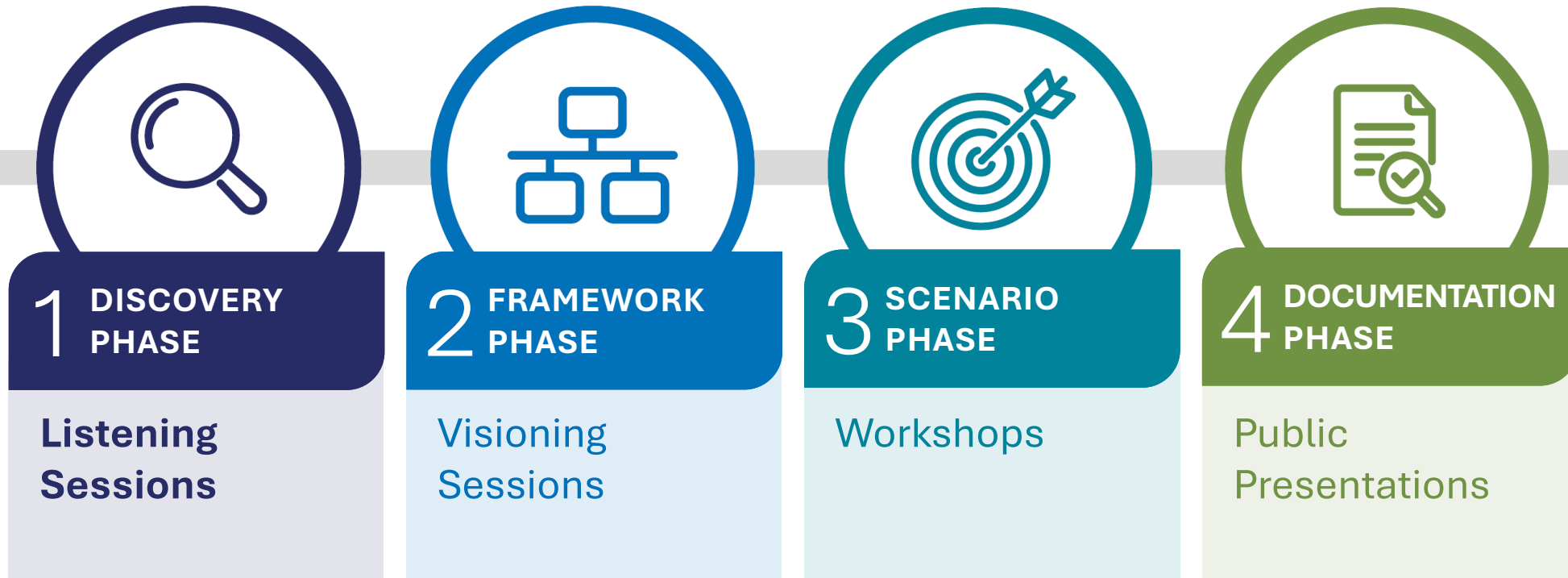
Goals:

- Optimize JBCC's operational efficiency
- Support current military missions and accommodate future needs
- Identify opportunities to address the regional housing shortage and grow the local economy

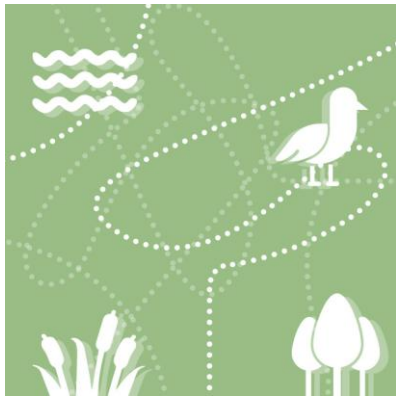
Plan will be informed by significant **public input**, including military commands, community groups, residents of nearby towns, and other stakeholders.



Public Engagement



Natural Resources



- Landscape Systems
- Vegetation and Wildlife
- Contamination and Remediation
- Open Space Uses

Infrastructure



- Water Supply
- Stormwater Treatment
- Wastewater Treatment
- Solid Waste and Compost
- Energy Infrastructure
- Telecommunications Infrastructure

Mobility



- Road Network
- Access and Security
- Aviation
- Rail
- Regional Transportation Considerations

Land Use



- Market Conditions
- Regional Land Use
- Cantonment Area Uses (Operational)
- Cantonment Area Uses (Non-Operational)

Stakeholder Listening Session: Land Use, Housing & Economic Development

Land Use



Market Conditions

Regional Land Use

Cantonment Area Uses (Operational)

Cantonment Area Uses (Non-Operational)

Baseline Documents and Data

Regional and Statewide Planning

- 2025 Cape Cod Commission Regional Policy Plan
- 2021 Solid Waste Management on Cape Cod and the Islands
- 2022 Massachusetts Military Installations Economic Contributions and Linkages
- 2024 Cape Cod Regional Housing Strategy
- 2024 Cape Cod Comprehensive Economic Development Strategy
- 2024 Cape Cod Regional Transportation Plan

Local Planning Context - Bourne, Falmouth, Mashpee, and Sandwich

- Comprehensive Plans – 2019, 2016, 1998, and 2024 respectively
- Housing Production Plans – 2023, 2024, 2025, and 2021 respectively
- Open Space and Recreation Plans – 2018, 2014, 2009, and 2018 respectively
- Zoning Bylaws

Land Use



Market Conditions

Regional Land Use

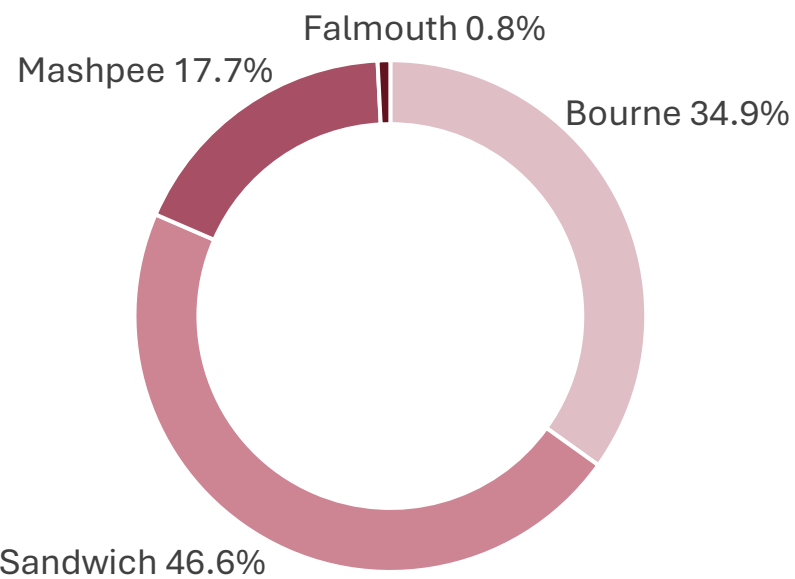
Cantonment Area Uses (Operational)

Cantonment Area Uses (Non-Operational)



Municipal Boundaries

The Cantonment Area's 7,000 acres are primarily located in Bourne and Sandwich, with portions in Mashpee and Falmouth.



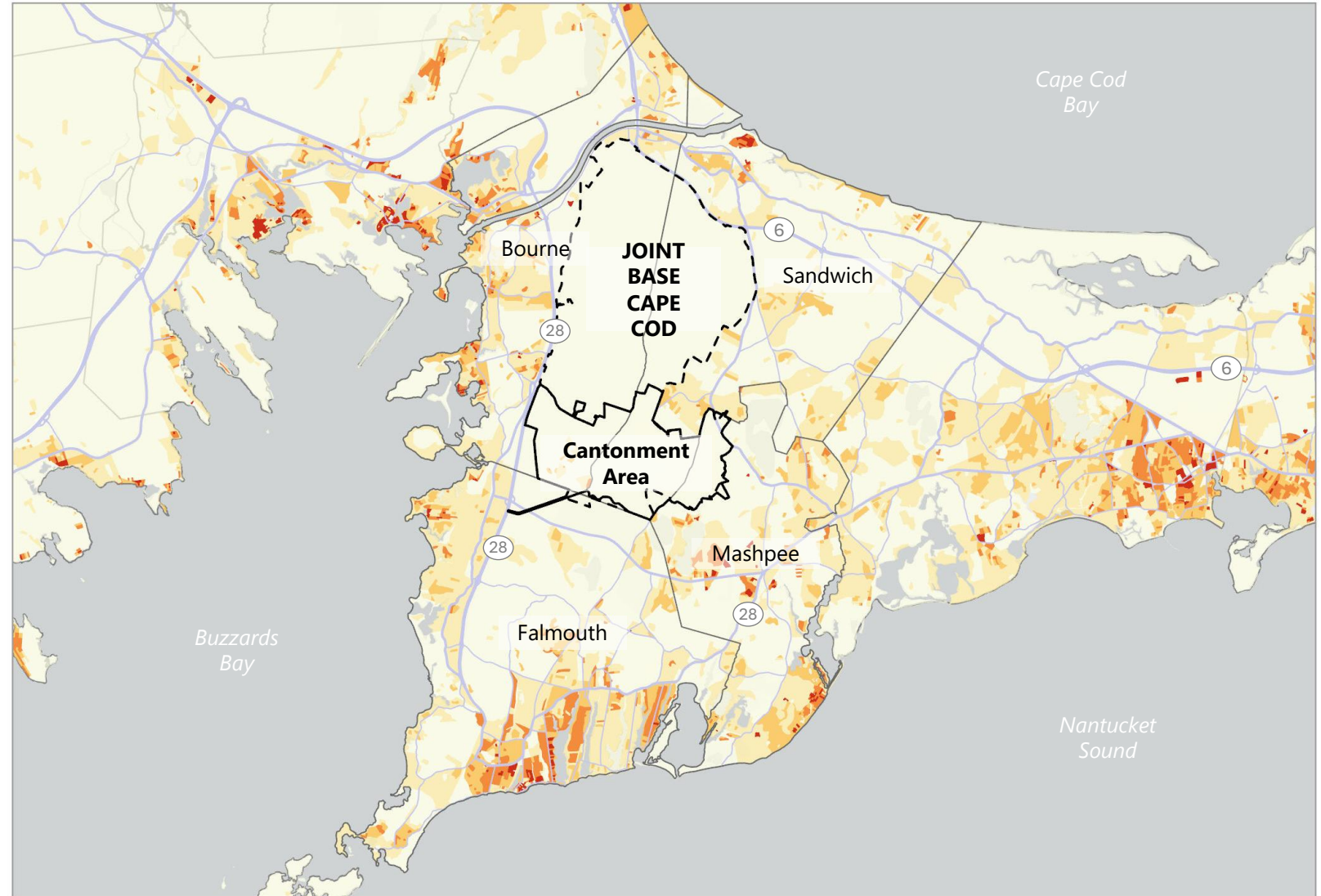
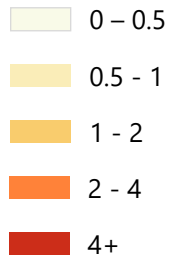
Data source: MassGIS



Residential Density

- Low-density residential neighborhoods in Bourne, Sandwich, and Mashpee are adjacent to the Cantonment Area.
- Higher density residential areas do not abut the Cantonment Area, though some are in proximity

Dwelling Units / Acre



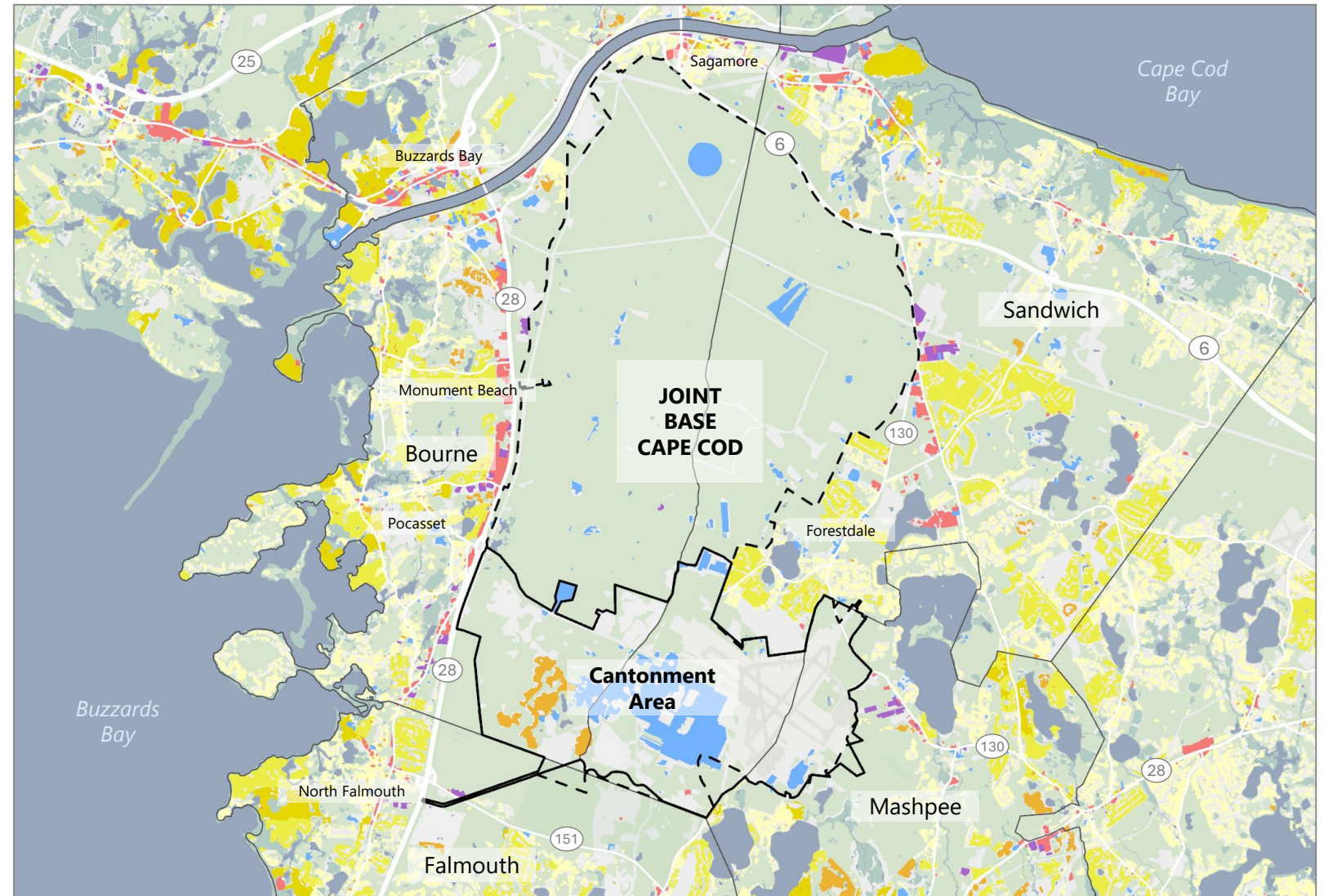
Data source: MassGIS



Regional Land Use

Land use nearby the Cantonment Area includes:

- Bourne: Mixed-use corridor on Route 28 with housing and commercial properties
- Mashpee and Sandwich: low-density residential areas



Data source: MassGIS (2005 data)



Local Zoning

	Bourne	Falmouth	Mashpee	Sandwich
Current Zoning in Cantonment Area	Government District	Public Use	Industrial 1	Government District
Abutting Zoning Districts	B2, 3, & 4, R40, and Scenic Development District (SDD)	Agricultural A and AA, and Business 2	Mostly R5, and some I1 and C2	R-1, R-2, B-2 and Flexible Growth (FLEX)

The zoning districts allow for a wide range of allowable uses, with certain municipalities putting more emphasis on industrial uses. Housing is generally not emphasized through the zoning within and adjacent to the Cantonment Area, despite it being a priority in local comprehensive plans.

Economic Base Conditions Summary

- Upper Cape Cod employment dominated by lower-wage, high-seasonality industries with minimal growth over the past decade.
- High cost of housing and limited commuting options create risk of labor shortages, reinforcing workforce housing needs in Barnstable County.

SEASONAL EMPLOYMENT SWING

+5,800 jobs

peak-to-trough jobs added
(accom. & recreation)

Accommodation and food service nearly doubles from winter to summer. This seasonality constrains the year-round workforce base and limits the renter pool available to support multifamily development at JBCC.

LOW-WAGE EMPLOYMENT BASE

~12,500

jobs in near-zero-growth
low-wage occupations

Food preparation, building maintenance, transportation, and sales together account for roughly a third of all jobs — and all cluster near zero growth. COL-adjusted wages in these occupations fall well short of what is needed to afford market-rate housing on the Cape.

CONSTRAINED LABOR SHED

~50%

of workers live within 10
miles of their jobs

Bridge access limits commute flexibility. Workers cannot offset rising housing costs by commuting from cheaper communities off-Cape.

Housing Market Conditions Summary

- Upper Cape housing supply hasn't kept pace with demand; ownership affordability has deteriorated sharply.
- Year-round rental pool shrinking due to seasonal conversions, second-home purchases, and investor activity.
- Workforce housing is a high-priority opportunity on Cape Cod.

MEDIAN HOME SALE PRICE

+114%

decade-over-decade price increase (\$375K → \$801K)

Prices have more than doubled in a decade. At \$800,700, the median sale price is accessible only to households earning well above 120% AMI.

RENTAL MARKET TIGHTENING

-63%

decline in rental vacancies over the past decade

Seasonal conversion, second-home purchases, and investor activity have dramatically reduced units available for year-round rent (794 to 293 units).

HOUSING STOCK COMPOSITION

87%

of the housing stock is single-family

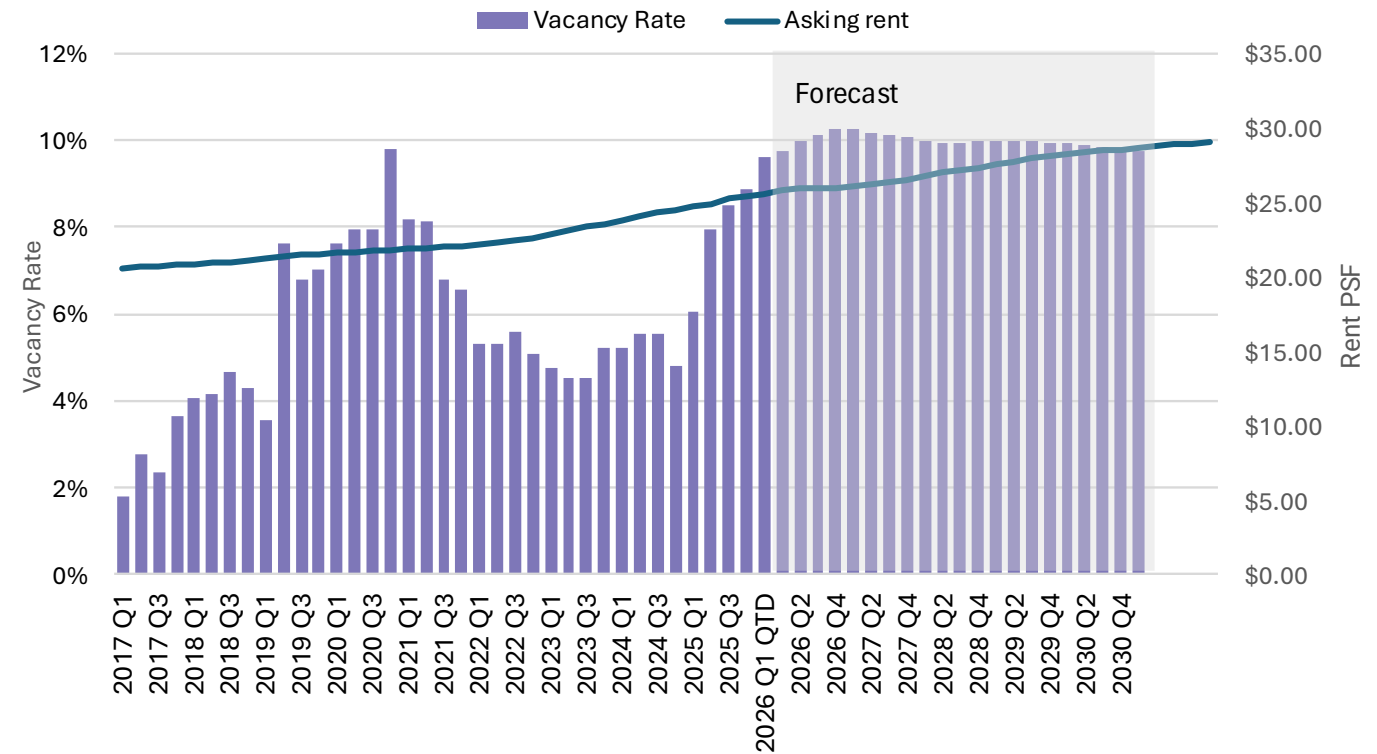
The housing stock is overwhelmingly single-family, peaked in construction during the 1980s, and has seen declining new supply each decade since.



Retail Market Conditions

- The Upper Cape faces a softening retail market. Vacancy is 9.6%, above the 10-year average of 6.1%, and is expected to remain near 10% through 2030.
- Net absorption is negative 20,000 SF, meaning tenants are giving back more space than they are occupying.
- No new retail space has been delivered in the study area over the past decade.

Historic and projected retail vacancy rate and rent
Upper Cape Cod, 2017-2030



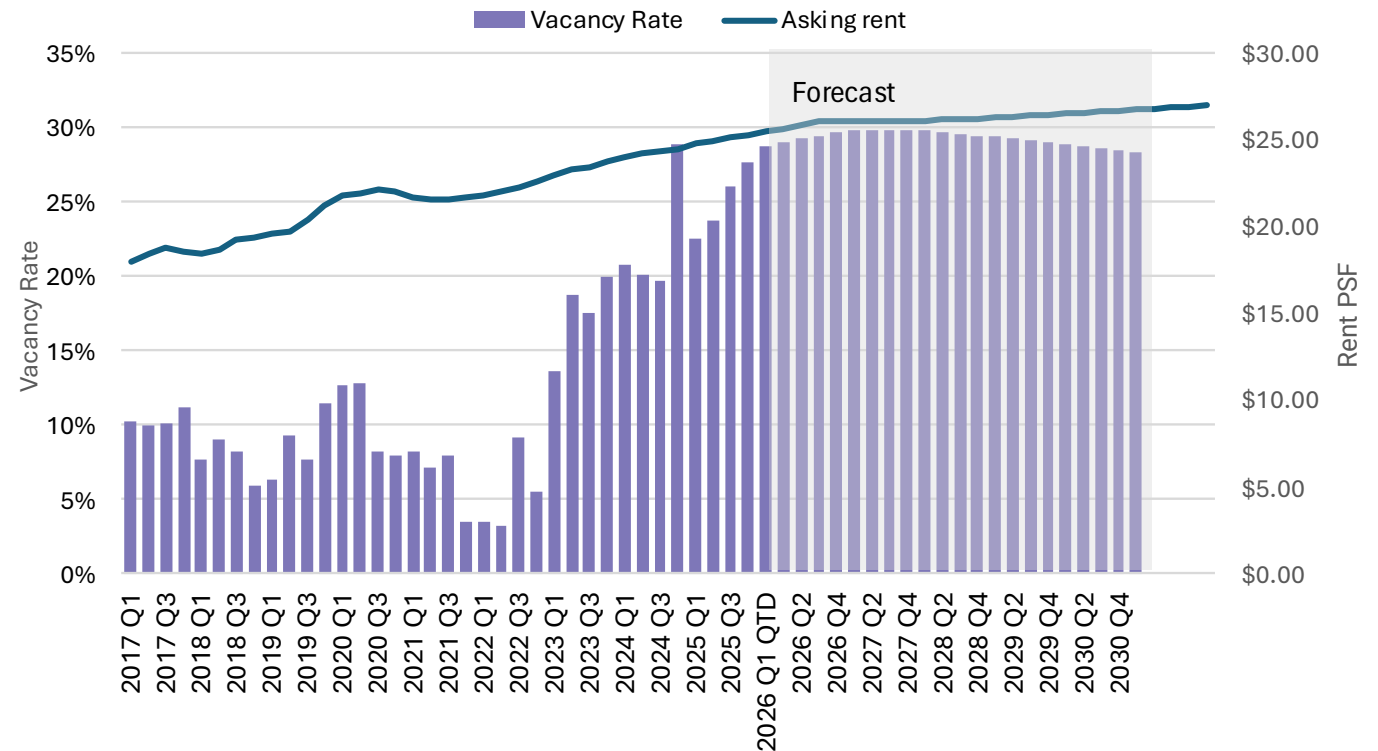
Source: RKG analysis of CoStar data



Office Market Conditions

- Office vacancy has risen to 29%, far above the sub-10% levels from 2017–2021, and is expected to remain near 30% through 2030.
- Remote and hybrid work have reduced demand for traditional office space.
- Speculative office development on Cape Cod would be risky.

Historic and projected office vacancy rate and rent
Upper Cape Cod, 2017-2030



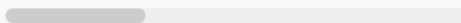

Source: RKG analysis of CoStar data



Industrial Market Conditions

- Limited active industrial listings on Cape Cod, with fewer than 15 properties available for lease
- High regional vacancy (34%) reflects functional obsolescence of older buildings, not weak demand
- Modern industrial space is leasing at \$16–\$25/SF, with newer Mashpee properties achieving occupancy at or near opening
- Strong opportunity on Cape Cod to support contractor bays and flex industrial space

Industrial market conditions Plymouth-Barnstable Region

METRIC	TIER 1 Legacy Stock	TIER 2 Modern Stock
TYPICAL YEAR BUILT	Pre-1980 <i>Many built 1900–1960s; little to no renovation</i>	2000s–2026 <i>Purpose-built; several currently under construction</i>
BUILDING CLASS	Mostly Class C 1–2 Star <i>Functionally obsolete for most modern industrial uses</i>	Class A / B 3–5 Star <i>Meets current tenant requirements for ceiling, access, power</i>
CEILING HEIGHT	10–14 ft <i>Below minimum threshold for most logistics and light industrial tenants</i>	22–40 ft <i>Suitable for racking, equipment, and contractor operations</i>
ASKING RENT	\$5–\$10 /SF/yr  Low	\$16–\$25 /SF/yr  High
DEMAND SIGNAL	High vacancy Negative absorption <i>Tenants vacating; space sitting idle despite discounted rents</i>	Pre-leasing activity New starts accelerating <i>Developers building speculatively; 50 Evergreen Cir, Mercantile Way leasing at opening</i>
JBCC IMPLICATION	<i>Not a model for JBCC development — existing vacancy reflects obsolescence, not oversupply</i>	JBCC opportunity: purpose-built contractor bays and flex industrial targeting the same demand driving new construction regionally

Key finding: Aggregate vacancy of ~34% across the Plymouth-Barnstable market overstates weakness. Nearly all vacant square footage is legacy Class C stock with functionally inadequate specifications. New modern product — exemplified by **50 Evergreen Circle (Mashpee, 2026)** and **68 Mercantile Way (Mashpee, 2024, \$25/SF)** — is leasing at premium rents, confirming unmet demand for quality space on the Upper Cape.

Source: RKG analysis of CoStar data

Discussion Questions

Housing

1. To what extent are the housing needs of military personnel and people working at JBCC met within the regional housing market? What housing-related challenges do military personnel and JBCC staff face?
2. Are there opportunities for partnerships between JBCC and neighboring communities to address housing affordability challenges or expand housing options?

Economic Development

1. What opportunities exist for partnerships between JBCC and regional businesses, educational institutions, or economic development organizations?
2. Are there opportunities to leverage JBCC assets, capabilities, or activities to support broader regional economic development goals or specific industry clusters?

Zoning and Land Use Planning

1. Are there areas around the base perimeter where land use transitions, buffers, or specific zoning approaches would benefit both JBCC operations, conservation programs/efforts, and adjacent communities?
2. In addition to housing, which was identified as a need in local comprehensive plans, what other land uses are of interest to the host communities?
3. Looking ahead 10-20 years, how can JBCC and neighboring communities best work together on land use planning?
4. How can the JBCC master plan effort best coordinate with municipal comprehensive plans and regional planning efforts?