

**Amendment 35 to Council Bill No. 28 -2023**

**BY: The Chairperson at the Request  
of the County Executive**

**Legislative Day 11  
Date: October 2, 2023**

**Amendment No. 35**

*(This Amendment makes a technical correction to Tables 5-2 and 5-3 to include Howard County Government and Howard County Public School System employees, to indicate that Freshly has closed as of early 2023 and to list the source citation for Table 5-3.)*

- 1 In the *HoCo By Design* General Plan, attached to this Act as Exhibit A, amend the following
- 2 pages as indicated in this Amendment:
- 3     • Chapter 5, Economic Prosperity – page 12
- 4
- 5 Correct all page numbers, numbering, and formatting within this Act to accommodate this
- 6 amendment.

## Current Jobs and Unemployment

According to the Maryland Department of Labor, there were over 174,000 jobs in Howard County in 2020. As indicated in Table 5-1, Howard County had the 6<sup>th</sup> greatest number of jobs in Central Maryland and the 2<sup>nd</sup> greatest 10-year job growth rate at 23.5%, just behind the 24.5% growth rate experienced in Anne Arundel County. Montgomery County had the greatest number of jobs in Central Maryland, followed by Baltimore City and the other large counties surrounding Howard County.

	2010		2020		2010 to 2020	
	Jobs	Percent	Jobs	Percent	Jobs	% Increase
Montgomery County	433,226	22%	469,462	21%	36,236	8.4%
Baltimore City	320,403	16%	389,738	17%	69,335	21.6%
Baltimore County	355,189	18%	374,165	17%	18,976	5.3%
Prince George's County	292,271	15%	318,755	14%	26,484	9.1%
Anne Arundel County	220,228	11%	274,102	12%	53,874	24.5%
<b>Howard County</b>	<b>141,169</b>	<b>7%</b>	<b>174,390</b>	<b>8%</b>	<b>33,221</b>	<b>23.5%</b>
Frederick County	89,106	4%	104,013	5%	14,907	16.7%
Harford County	78,828	4%	93,784	4%	14,956	19.0%
Carroll County	52,772	3%	57,571	3%	4,799	9.1%
<b>TOTAL</b>	<b>1,983,192</b>	<b>100%</b>	<b>2,255,980</b>	<b>100%</b>	<b>272,788</b>	<b>13.8%</b>

Source: Maryland Department of Labor (1st quarter)

Table 5-2 shows the major employers in Howard County, based on information provided by the Howard County Economic Development Authority (HCEA). Howard County continues to be an attractive place for large businesses. However, as important as large companies may be, HCEA's Strategic Plan suggests that fostering small to mid-size companies should be prioritized to achieve maximum future job growth. As new businesses expand, new job opportunities will arise, particularly in the professional and business services and technology sectors.

Given the highly-educated workforce in Howard County, the unemployment rate is typically among the lowest in Maryland. As of August 2021, the unemployment rate in Howard County was 4.3%, compared to 5.8% in Maryland and 5.2% in the US. It is anticipated that the unemployment rate will remain low in Howard County over the next 20 years as the County's job base and population continue to grow. Howard County's location in the middle of the Baltimore and Washington regions will continue to be an asset, attracting new businesses and offering opportunities for residents to find work that matches their education and skills.

## Market Demand Conditions

In addition to projecting the need for 30,000 new housing units, the Market Research and Demand Forecast projected the need for 16.5 million square feet of commercial space and 1,000 hotel rooms. The commercial space needs are broken down by industry in Table 5-3 and housing units are broken down by type.<sup>1</sup>

**Table 5-2: Howard County's Largest Private Employers (2022 2021)**

Employer	Estimated Employees	Product/Service
<u>Howard County Public School System</u>	<u>8,561</u>	<u>Education</u>
Johns Hopkins Applied Physics Laboratory	7,200	R&D systems engineering
<u>Howard County Government</u>	<u>3,200</u>	<u>Government</u>
Howard County General Hospital	1,800	Medical services
Verizon	1,700	Telecommunications
Howard Community College	1,400	Higher education
The Columbia Association	1,200	Nonprofit civic organization
Lorien Health Systems	1,190	Nursing care
Coastal Sunbelt Produce	1,050	Food products distribution
Nestle Dreyer's Ice Cream	835	Frozen desserts
Freshly *	820	Prepared meals manufacturing
Wells Fargo	810	Financial services
Maxim Healthcare Services	675	HQ/Medical staffing, wellness
Oracle	650	Software development
W.R. Grace & Co.	600	HQ/Chemical R&D
Sysco Food Services	515	Food products distribution
Enterprise Community Partners	505	HQ/Community development

Note: Excludes post offices and state ~~and local~~ governments

Source: HCEA Research \*In early 2023, Freshly closed its warehouse located in Howard County.

**Table 5-3: Summary of Demand 2020-2040**

	Cumulative Demand By 5-Year Increment			
	2025	2030	2035	2040
Single-Family Detached (units)	3,428	5,808	7,996	9,807
Single-Family Attached (units)	2,743	4,685	6,502	8,033
Rental Apartment (units) For-	3,626	6,320	8,947	11,249
Sale Condominium (units)	437	859	1,361	1,884
Office (sf)	1,828,711	3,289,007	4,741,323	6,315,129
Flex (sf)	317,406	564,815	792,410	1,030,921
Industrial (sf)	2,358,227	4,164,086	5,570,199	7,150,158
Retail (sf)	642,400	1,125,800	1,603,300	2,037,600
Hotel (keys)	246	509	752	1,019

Source: RCLCO's Market Research and Demand Forecast (2020)

<sup>1</sup> As previously noted, RCLCO's Market Research and Demand Forecast projected a 59,000 increase in jobs by 2040. To arrive at this figure, RCLCO first examined Baltimore Metropolitan Council (BMC) projections for the region, then used Moody's Analytics projections to distribute regional growth by industry (adjusting for COVID-19 impacts), and finally determined the County's future share of regional industry growth using historical trends. RCLCO then projected household growth based on this projected employment growth, arriving at a projected need for 31,000 new housing units in the County. In addition to projecting the need for 31,000 new housing units, the Market Research and Demand Forecast projected the need for 16.5 million square feet of commercial space and 1,000 hotel rooms. RCLCO projected demand for office, flex, and industrial space by estimating the type of space and square footage needed to accommodate each new employee by industry; projections for hotel rooms were based on the current ratio between jobs in the County and hotel rooms. RCLCO projected demand for retail space based on estimated spending from new households and employees (adjusting for online spending).