



CHAPTER 5

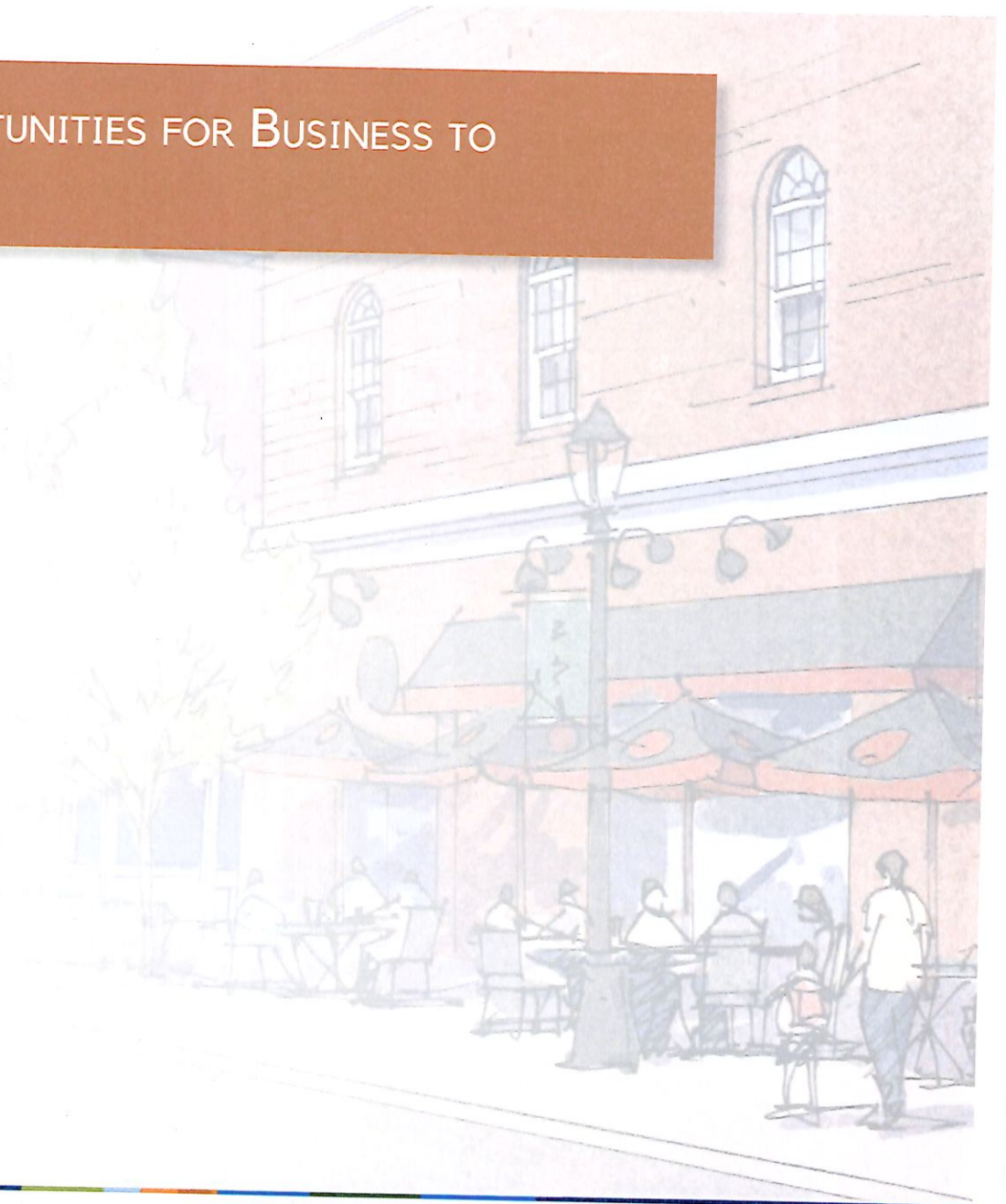
ECONOMIC PROSPERITY



ECONOMIC PROSPERITY: CREATING OPPORTUNITIES FOR BUSINESS TO INNOVATE AND THRIVE

This chapter highlights values, policies, and initiatives that will strengthen Howard County's position as a self-sustaining, diverse employment center for the region. It outlines land use, housing, arts, entertainment, transportation, and other infrastructure considerations that will reinforce the County's overall strategy for economic development. It acknowledges that new technologies, such as e-commerce and automation, will influence current industries and will change land use needs. Finally, the chapter underscores the impact and importance of agriculture on the County's economy.

Key approaches to enhancing Howard County's economy include supporting industrial growth, creating opportunities for mixed-use activity centers, ensuring a healthy jobs-housing balance, supporting modern agriculture, enhancing access to employment training and education, promoting job diversity, and supporting businesses of all sizes so that they can be strong and prosperous in the future.



WHAT WE HEARD

Throughout the public engagement and planning process, community members, residents, and stakeholders discussed economic growth in the context of its potential impact on jobs, schools, transportation, and housing needs.

Community members expressed a need for improved transportation services, specifically transit. Others identified a need to increase housing supply to serve local jobs. Participants suggested that employment centers should be located in areas that are more accessible to workers. Some remarked that it is difficult to grow a diverse job base without affordable housing in places served by public transit. There was concern that housing in Howard County is not financially attainable for many people, and that the County needs a greater variety and supply of housing types at various price points (for both renters and homeowners). Others suggested that Howard County and neighboring jurisdictions need to offer ample housing opportunities for a growing workforce.

While some community members advocated for more commercial and office development, others were skeptical about the future of modern office parks and buildings, noting concerns that office space and shopping centers would become obsolete. Many participants nonetheless supported efforts to attract major employers. Others commented that the County should focus on small business development. The lack of affordable commercial space was noted as a potential barrier to establishing small, diverse, minority-owned, and local businesses.

In the Diversity, Equity, and Inclusion focus group conversations, business owners commented on capital access challenges for Black-owned businesses and the need for services to help young entrepreneurs. Business owners advocated for more affordable housing for low and middle income earners to attract employees.



Some participants advocated for targeting new jobs in the manufacturing, distribution, and logistics sectors to build on the current strength of these industries located in major interstate highway corridors. While some community members supported industrial growth in the Route 1 Corridor, others felt that housing and mixed-use development should be priorities there.

Employers remarked that well-paying industrial jobs could increase in the future. They said these jobs typically require training, certification, and apprenticeship and offer career opportunities for those without a four-year college degree. They indicated that vocational and technical training should be made accessible to community members near neighborhoods, at community centers, and at facilities served by transit.

Additionally, community members expressed concern with expressed concern with growing costs and the difficulty of building housing and commercial projects in the County, and advocated for consideration of how changes in the cost of development could affect affordability in the County.

Howard County residents expressed strong support for local farming and agribusiness. They embraced the importance of locally-grown food, noting the shortcomings of the global food supply system during the Covid-19 pandemic. Some participants advocated for more food options located closer to carless households. Columbia's walkable village centers were identified as good locations for restaurants and grocery stores featuring locally-sourced food. The public also expressed interest in more farmers markets to support local agriculture.

Participants remarked that the County should invest in the arts—including supporting artists and creative infrastructure. Community members expressed interest in more cultural and entertainment options (such as independent movie theaters, museums, and unique recreational/cultural events) that appeal across generations.

The community advocated for enhanced countywide broadband infrastructure. Participants pointed to the Covid-19 pandemic's role in making high-speed internet access an essential component of remote learning and employment. Others emphasized the environmental benefits of virtual work made possible by broadband, such as reduced road congestion and air pollution.



Diversity, Equity, and Inclusion Focus Groups Findings

- Be intentional about increasing jobs in the manufacturing/distribution/logistics industries.
- Locate jobs where workers can access them, especially via public transit.
- Create more opportunities for career development and vocational/technical training for youth and adults, particularly through Howard Community College.
- Need for affordable commercial space to increase the number of small, diverse, local businesses in the County
- Need housing that is affordable for workers in the County
- Lack of cultural activities and entertainment that appeal to multiple generations and diverse backgrounds
- Use creative solutions to address food deserts (areas without healthy, fresh food options).

Equity in Action

The following equity best practices inform several of the policies and implementing actions in this chapter. Each policy or implementing action that directly advances equitable outcomes will be noted with a "🌍" symbol.

- Plan for a housing supply that meets the needs of the workforce and offers a healthy jobs/housing balance.
- Support retention and attraction of jobs that offer employment opportunities for a diverse workforce.
- Promote inclusive activation and programming of public spaces.
- Support planning and funding that enhances or expands multi-modal transportation infrastructure that provides access to jobs and amenities.
- Plan for training and educating a diverse workforce.
- Address the needs of small, minority-owned businesses.
- Plan for access to healthy, locally-grown food for all neighborhoods.

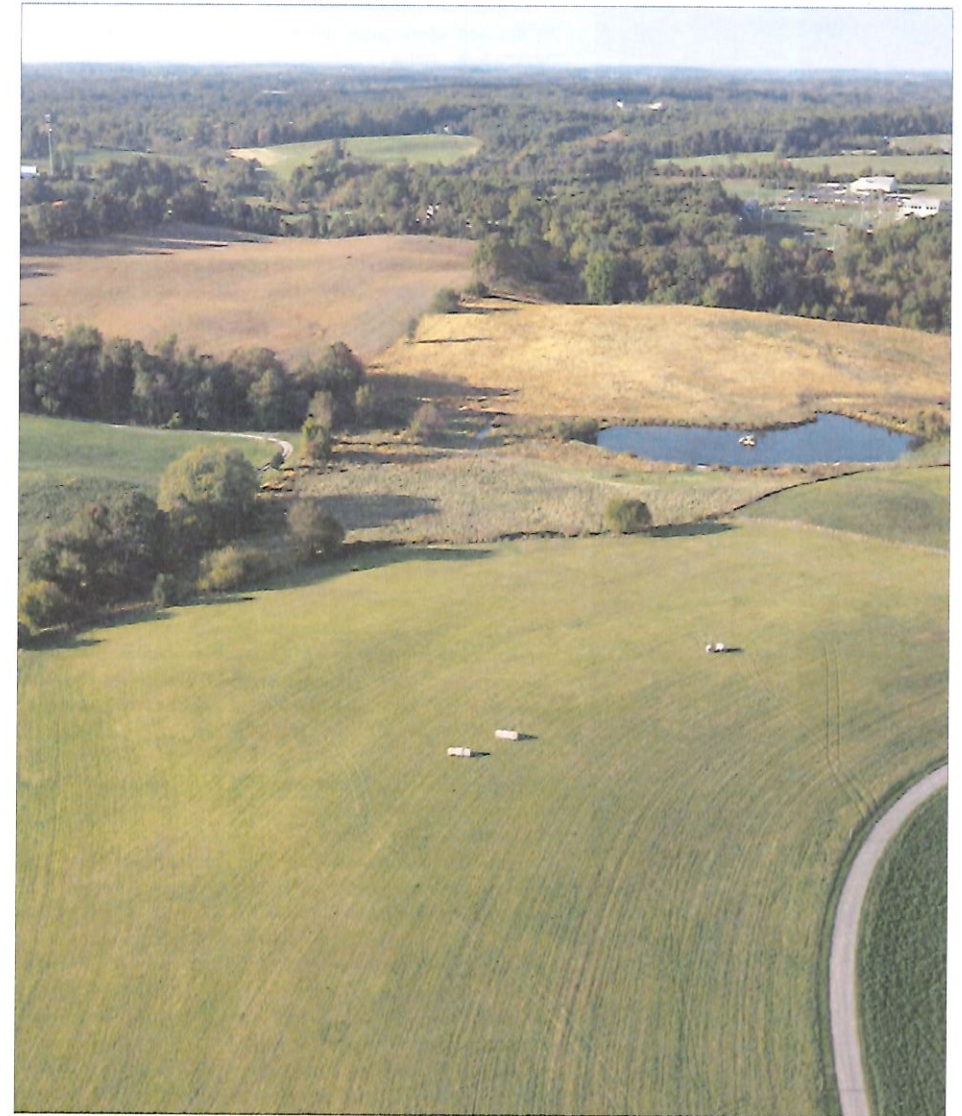
ECONOMIC PROSPERITY TERMS

E-Commerce: Business transactions (buying and selling) conducted online.

Co-Working: A situation where individuals from different companies work in a shared space.

Last-mile delivery: The last step in a supply chain, when a good is transported from a warehouse to its final delivery destination (for example, a personal residence or retail storefront).

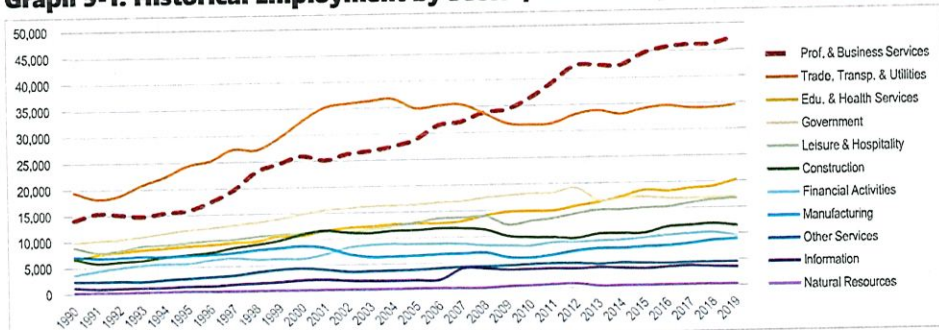
Automation: Technologies and machinery that operate with minimal or reduced human interaction.



Existing Market and Land Use Conditions

Howard County is located in the center of the nation's fourth largest metropolitan area. This has positioned the County as a regional employment center, attracting both business and job-seekers from across central Maryland and the nation as a whole. Over the last ten years, an average of more than 3,000 new jobs per year have been added to the County's employment base. Key employment sectors in the County include professional and business services; trade, transportation, and utilities; and education and health services. Growth in these sectors—particularly the professional and business services sector—is partly attributed to the County's favorable location in the broader Baltimore-Washington region, as well as Howard County's reputation as an attractive place to live and do business.

Graph 5-1: Historical Employment by Sector, 1990-2019, Howard County, MD

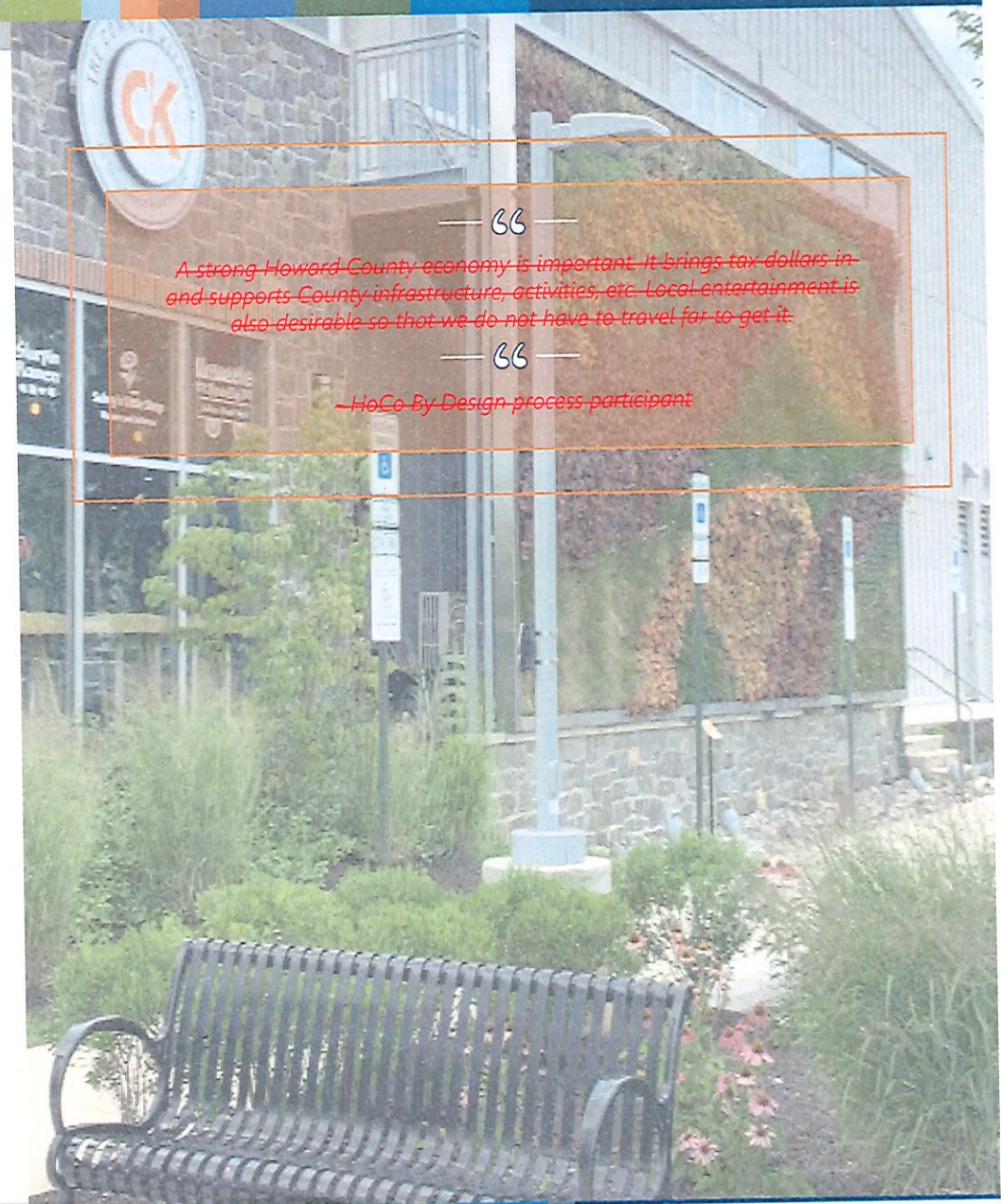


Source: Bureau of Labor Statistics, RCLCO

This trend in job growth is expected to continue over the next 20 years, as the regional job market continues to grow. The HoCo By Design team evaluated baseline conditions and emerging trends in a series of assessments completed in late 2020. The Market Research and Demand Forecast completed at that time projects Howard County could be home to up to 282,000 jobs by 2040, an increase of 59,000 jobs from estimated totals in 2019. By continuing to attract a diverse and highly-talented pool of workers, Howard County will earn its share of regional jobs. But capturing this share requires accessibility to workforce housing, transit, and other lifestyle amenities.

Growing local jobs will also help expand the County's commercial tax base, which was a key recommendation in the FY22 Spending Affordability Advisory Committee (SAAC) Report. The SAAC is tasked with annually reviewing County revenues and expenditures, and making recommendations on revenue projections, bond authorizations, long-term fiscal outlook, and other findings or recommendations that the committee deems appropriate.

According to the SAAC FY22 report, "[b]oosting commercial-base development is one of the most promising strategies to help rebalance the expenditure needs and fiscal resources. The County should continue to build on its current strengths in developing and implementing comprehensive strategies to promote, retain, and expand its commercial base." The report further detailed the importance of the General Plan in guiding development decisions that consider fiscal impacts on the County's budget and maintaining existing commercially zoned land to allow for additional commercial development. This conclusion was reiterated in the FY23 SAAC report, which called for the General Plan to encourage redevelopment and commercial growth in defined employment centers.



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 6th greatest number of jobs in Central Maryland and the 2nd 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.

Table 5-1: Jobs in Central Maryland

| | 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% |
| Howard County* | 141,169 | 7% | 174,390 | 8% | 33,221 | 23.5% |
| 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% |
| TOTAL | 1,983,192 | 100% | 2,255,980 | 100% | 272,788 | 13.8% |

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 (HCEDA). Howard County continues to be an attractive place for large businesses. However, as important as large companies may be, HCEDA'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~~ **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. The commercial space needs are broken down by industry in Table 5-3 and housing units are broken down by type.¹ The housing unit projection includes demand for 20,000 homeownership opportunities (single family attached, detached, and condos) and 11,000 apartment units.

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

| Employer | Estimated Employees | Product/Service |
|---|---------------------|-------------------------------|
| Howard County Public School System | 8,561 | Education |
| Johns Hopkins Applied Physics Laboratory | 7,200 | R&D systems engineering |
| Howard County Government | 3,200 | Government |
| 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: HCEDA 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)

¹ 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 employer (adjusting for online space).

Commercial

Commercial land uses comprise 3%, or approximately 6.9 square miles, of land in the County. Included in this category are retail, office, hotel, and service-oriented business uses. As shown in Map 5-1, these uses are primarily concentrated along major roads—Route 29, Route 1, and Route 40—or in suburban activity centers such as Downtown Columbia, Maple Lawn (including the neighboring Johns Hopkins Applied Physics Laboratory), and the Columbia Gateway area. Other locations are scattered throughout the County.

Most residents and employees will shop in-person near their home or place of work, while certain destinations are likely to draw users from across Howard County for specific shopping needs. Commercial uses are expected to be heavily concentrated in denser and/or more accessible parts of the County, such as Columbia, where office and retail demand is likely to be strongest. However, declining demand for “brick and mortar” retail and the changing needs of office users may lead to workplace transformations.

Based on the Department of Planning and Zoning (DPZ) land use database and CommunityViz modeling, it is estimated that there is potential to build about 10.1 million square feet of new non-residential building space in Howard County under current zoning, as shown in Table 5-4. This figure includes an additional 4.7 million square feet planned for Downtown Columbia. The Market Research and Demand Forecast indicated that there is a potential market demand in Howard County for 16.5 million square feet of new non-residential building space through the year 2040. As such, a shortfall of about 6.4 million square feet, or 38%, exists.

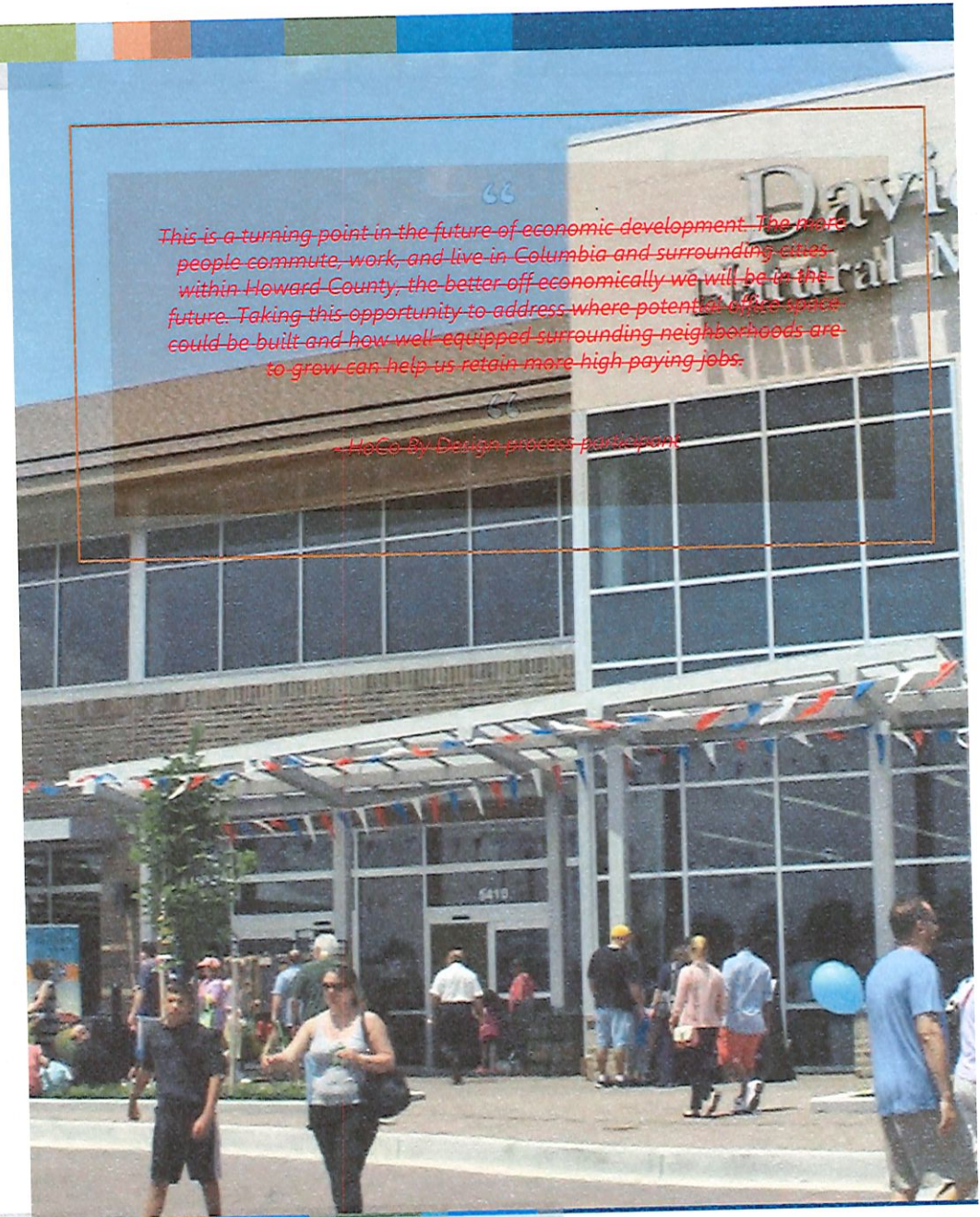
Table 5-4: Non-residential Jobs and Building Square Feet Potential Under Current Zoning and Undeveloped Land Capacity in Howard County

| Non-Residential Building Type | Square Feet (X 1,000) | Estimated Jobs |
|-------------------------------|-----------------------|----------------|
| Retail | 1,700 | 4,100 |
| A/B+ Office | 5,200 | 17,300 |
| B/C/Flex Office | 800 | 2,600 |
| Total | 10,100 | 28,300 |

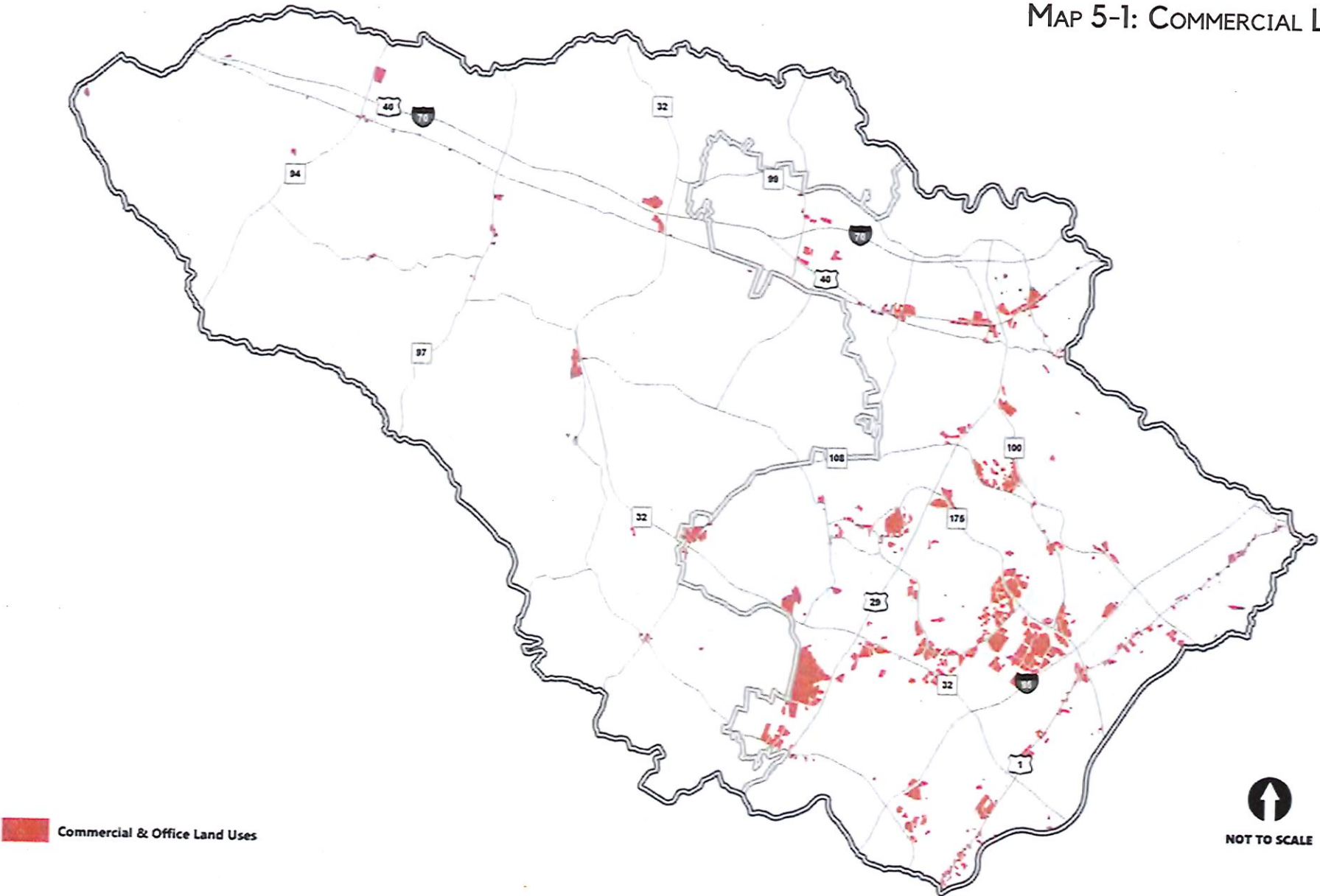
Source: DPZ Land Use Database and CommunityViz modeling

The existing capacity of 10.1 million square feet of non-residential space is estimated to accommodate 28,300 jobs, based on current jobs to building space ratios. This is less than half of the market demand of 59,000 new jobs over 20 years. This additional job demand could be accommodated through redevelopment opportunities in the activity centers and other non-residential character areas as identified on the Future Land Use Map (FLUM). These places can meet the greater market demand for non-residential space.

The greatest opportunity to accommodate the additional job demand would be the redevelopment of the large Regional Activity Center shown on the FLUM (the current Gateway office park). A master plan for Gateway could explore a variety of mixed-use development opportunities. Development in Gateway will extend beyond 2040 and could therefore accommodate additional demand after the 20-year timeframe of this Plan.



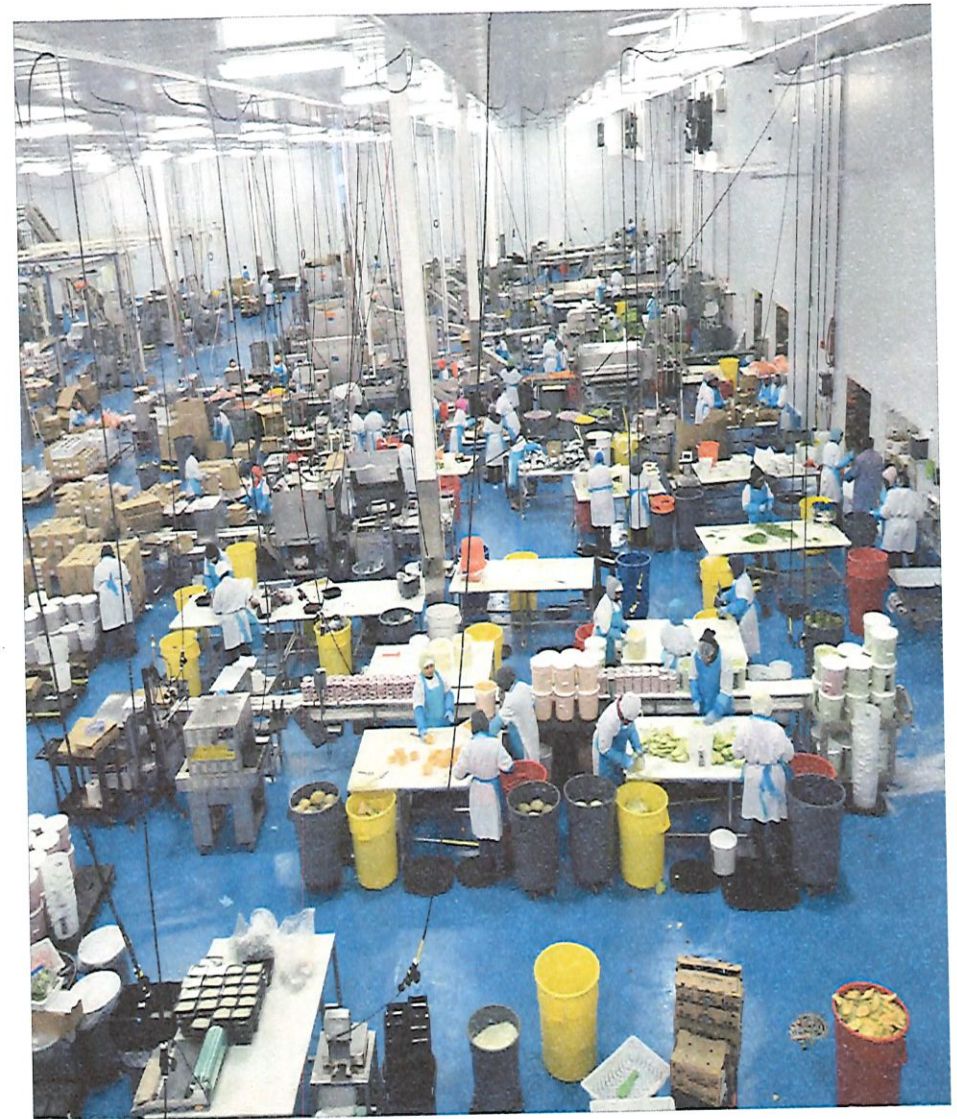
MAP 5-1: COMMERCIAL LAND USES



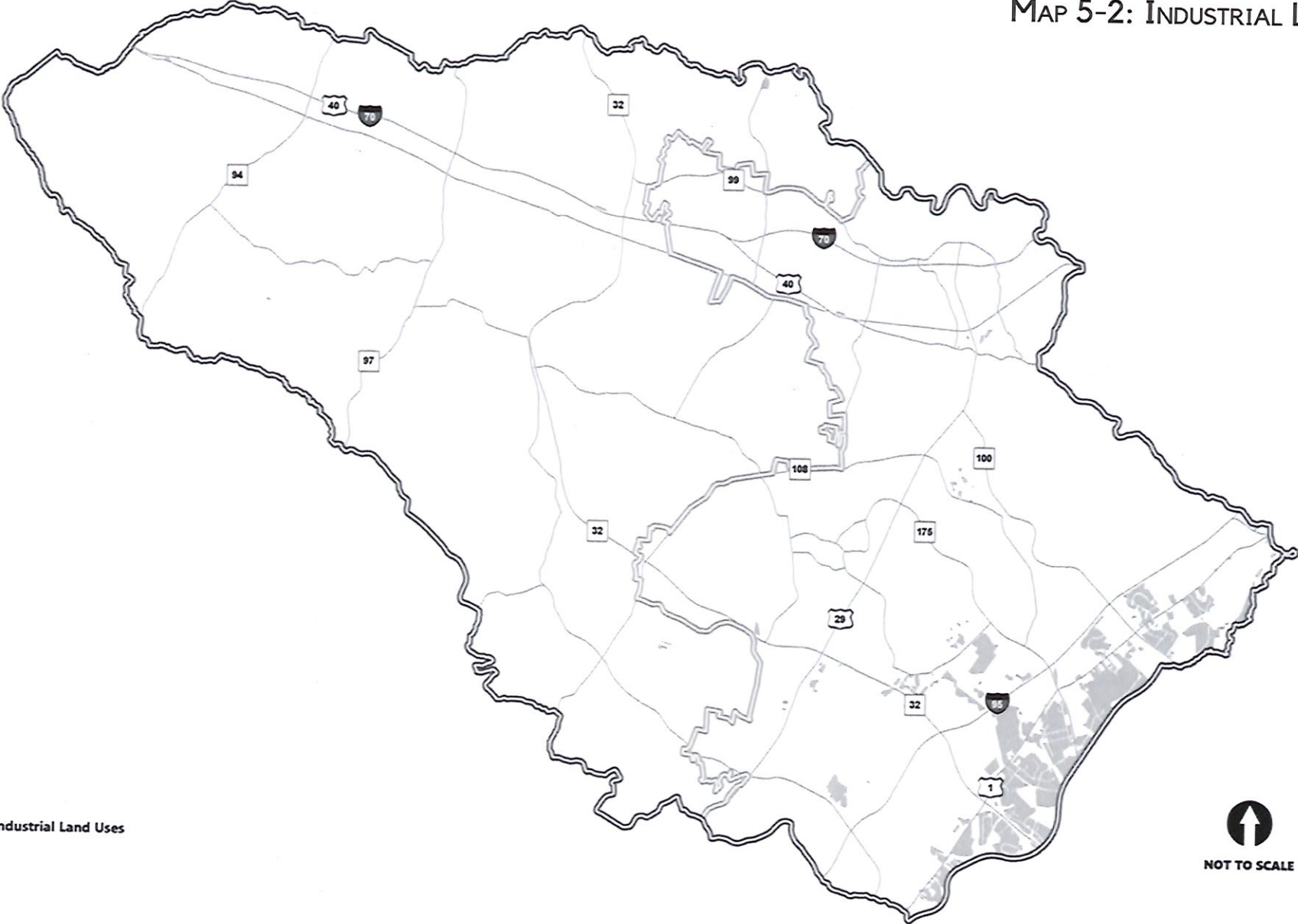
INDUSTRIAL

Industrial land, including manufacturing, warehousing and distribution, and utilities, represents 3% of the County, or approximately 7.12 square miles. As shown in Map 5-2, industrial land is concentrated in the Route 1 Corridor and eastern Columbia. Under current zoning regulations, the County has the potential for 2,400,000 new square feet of industrial space, or an estimated 4,300 jobs in industrial, manufacturing, or warehousing.

Howard County's industrial markets are strongest along the Route 1 Corridor (home to 25% of all jobs in Howard County) and in East Columbia (the Snowden-Dobbin Corridor and Gateway area). While East Columbia has industrial and employment zoning on about 2,100 acres, nearly half of this area has been converted to commercial use over time, further reducing the supply of available land for moderate to heavy industry. Additionally, the location of these industrial lands limits access for trucks responsible for the distribution of goods. Recommendations for industrial redevelopment and enhancement in appropriate locations of the Route 1 Corridor are further described in Route 1 Corridor: A Plan for Washington Boulevard.



MAP 5-2: INDUSTRIAL LAND USES



Industrial Land Uses

↑
NOT TO SCALE

KEY BUSINESS DISTRICTS AND CORRIDORS

Seven business districts (shown in Map 5-3) represent opportunities for employment growth at different scales. Each area presents diverse prospects for business to thrive and contributes different levels of economic impact. However, they all work together to maintain Howard County's regional status and high quality of life.

Main Streets

Howard County's main streets are anchored in areas with rich histories, featuring historic buildings of significance within unique built environments and landscapes. The County's only state-designated Main Street, Old Ellicott City, is an economic engine and boasts a collection of independent merchants and restaurants in an historic environment. As such, it is a regional tourism destination, a center for entrepreneurial endeavors, and an active, nationally-significant historic commercial district. The Ellicott City Watershed Master Plan (ECWMP), while a stand-alone document, is incorporated by reference in HoCo By Design and includes an economic development framework of policies and actions that are based on a market assessment and community engagement conducted through that planning process. These policies and actions guide new construction, redevelopment, existing business support, attraction and retention, and branding and marketing efforts along Main Street in Ellicott City.

While not designated as Main Streets or historic districts, smaller commercial districts also exist in Elkrigde and Savage Mill. Both areas host a growing presence of small businesses that embrace the character of a typical main street and possess the potential to become destinations through deliberate placemaking, partnerships, and marketing.



MARYLAND MAIN STREET PROGRAM

In 1988, the Maryland Department of Housing and Community Development established Main Street Maryland, a comprehensive program for traditional downtown revitalization. This program follows similar tenants to the National Trust for Historic Preservation's Main Street approach, focusing on economic development through activities such as historic building rehabilitation, organizational partnerships, marketing and promotion, special events, and improvements to public areas. Old Ellicott City became a state-designated Main Street in 2015.



Route 1 Corridor

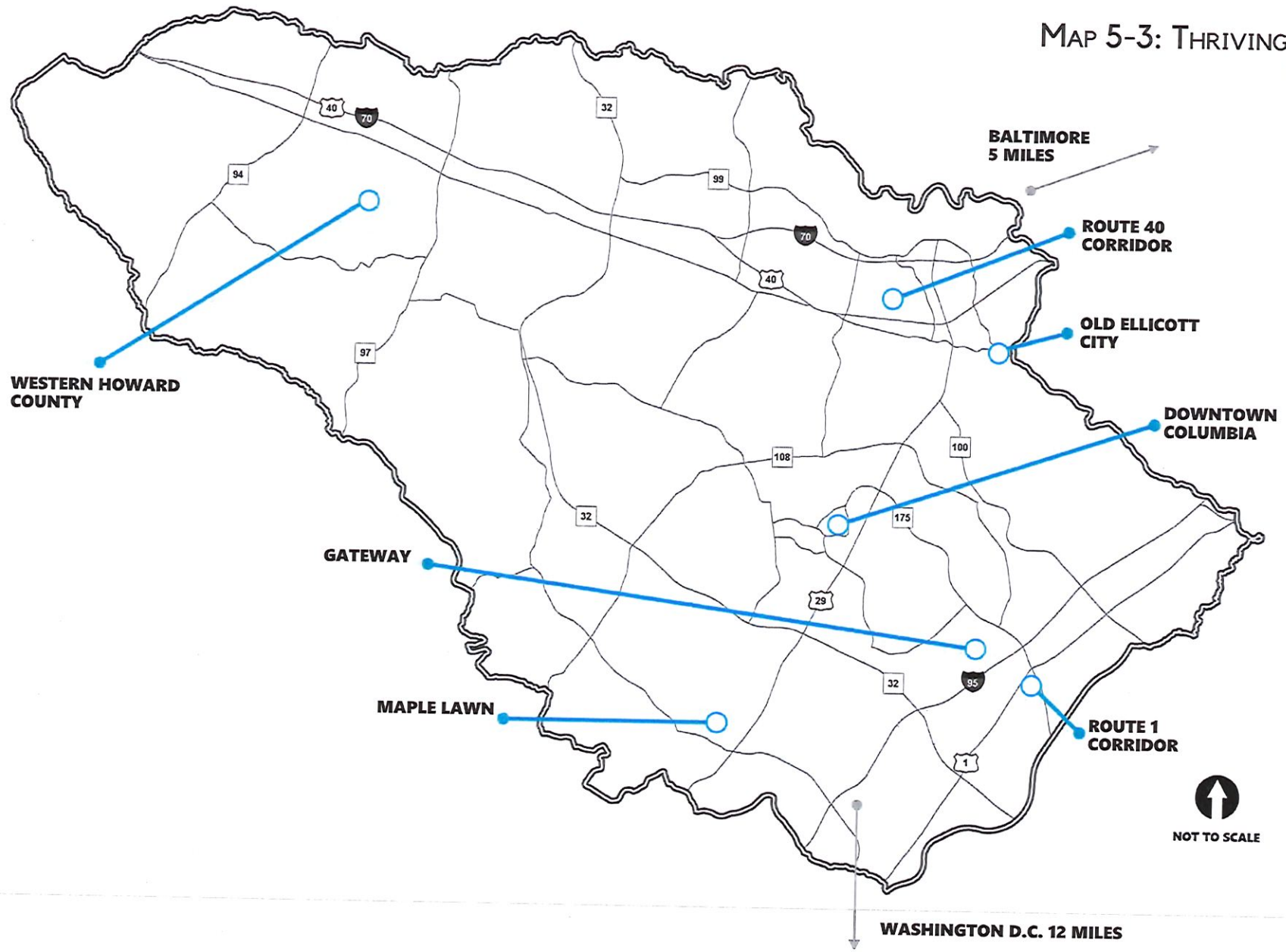
The Route 1 Corridor is located a few miles from the Baltimore Washington International Thurgood Marshall Airport (BWI), Fort Meade, the National Security Agency (NSA), the Port of Baltimore, and other important federal institutions. First known as the Washington and Baltimore Turnpike in the early 1800s, Route 1 currently serves as a critical eastern transportation corridor connecting major employment centers in Baltimore and Washington, DC. The nearly 12-mile stretch of Route 1 is an essential part of the vibrant neighborhoods and economy of Howard County. In 2020, the Route 1 Corridor's total employment accounted for 25.2% of all jobs in Howard County, according to the Maryland Department of Labor data, and is projected to grow an additional 1,000 jobs by 2025.

The Route 1 Corridor is characterized by a mix of heavy industrial, warehouse/distribution, and pockets of residential uses. Additional legacy uses include motels, trucking facilities, car repair businesses, fueling stations, and storage facilities. The Corridor also has a considerable number of underutilized properties woven into these various active uses, which have potential for redevelopment. The Corridor is also home to several historic communities, stable single-family subdivisions, and newer multi-family developments. The Corridor has four Transit Oriented Development (TOD) Districts—Oxford Square, Dorsey, Annapolis Junction, and Laurel Park—that allow for employment center opportunities within walking distance of public transportation.

The success of this industrial Corridor hinges on key economic trends, consumer preferences, and the changing retail climate. One trend is industrial space expansion from manufacturing to distribution and warehousing in submarkets along the Corridor—the southeast and east Elkrigde. This expansion is partially driven by location and the profound shifts occurring in consumer spending patterns from point-of-sale locations to e-commerce sites. Retaining industrial land is of primary importance and often competes with efforts to create a safer, more attractive, and higher-functioning corridor. With the limited availability of large industrially-zoned properties, these limited resources must be closely managed and retained over time. Ground floor retail along the Corridor is struggling and will require regulatory changes to remain viable. Many parcels along the Route 1 Corridor are zoned Corridor Activity Center (CAC). The purpose of the CAC District, as stated in the Zoning Regulations, is to "...provide for the development of pedestrian-oriented, urban activity centers with a mix of uses which may include retail, service, office, and residential uses." This intended purpose has not been realized. As noted in the 2018 Land Development Regulations Assessment, many stakeholders indicated the 50% retail requirement was difficult to meet given retail market conditions along the Corridor. While the goals of this district remain desirable, the locations of these centers and incentives to create them must be revisited.

HoCo By Design's Future Land Use Map (FLUM) identifies focused activity centers throughout the Corridor to create compact, walkable environments that serve broader economic, entertainment, and housing needs in the community, including an Industrial Mixed-Use Activity Center character area. More information on the CAC district and activity centers in the Route 1 Corridor can be found in Route 1 Corridor: A Plan for Washington Boulevard.

MAP 5-3: THRIVING BUSINESS DISTRICTS



Route 40 Corridor

Route 40 was initially constructed in the 1930s as an east-west interstate highway. Today, Interstate 70 now serves as the primary east-west interstate, and Route 40's role has shifted to a predominantly commercial corridor that serves the local community. As defined in the Route 40 Manual, the Route 40 Corridor includes approximately seven miles of Route 40 and the surrounding properties from the Howard County line at the Patapsco River west to the interchange with Interstate 70. Along these seven miles, there are multiple shopping centers, gas stations, automobile dealerships, service businesses, and restaurants that were built in different eras. These commercial uses are largely clustered into three areas, each centered around a large shopping center: 1) Enchanted Forest; 2) Chatham; and 3) Normandy. There are also multiple residential neighborhoods along the Corridor and behind the commercial areas.

As Howard County has grown more diverse in recent decades, a variety of business offerings have emerged with a cluster of 170 Korean-owned establishments along the Route 40 Corridor. In 2016, a five-mile stretch of the Corridor was named "Korean Way," and in 2021, two Koreatown signs with pillars and tiled roofs were placed along the Corridor.

Like the CAC District along Route 1, the Traditional Neighborhood Center (TNC) Zoning District applies to many properties along the Route 40 Corridor. The purpose of the TNC District is to "provide for the development of pedestrian-oriented, urban activity centers with a mix of retail, service, office, and residential uses." Unlike the CAC District, the TNC District is an overlay, which means underlying commercial zoning still applies. To date, property owners have not opted to redevelop sites along Route 40 under the TNC overlay. The 2018 Land Development Regulations Assessment recommended that the TNC overlay be eliminated and replaced with a new community-scale mixed-use zoning district. HoCo By Design's Future Land Use Map (FLUM) recommends these areas become Mixed Use Activity Centers or Suburban Commercial areas to provide compact, walkable environments that serve broader economic, entertainment, and housing needs in the community.

EP-1 Policy Statement

Update County programs and policies to embrace and enhance commercial revitalization along the Route 40 Corridor.

Implementing Actions

1. Support the establishment of a business district association specific to the Route 40 Corridor.
2. Update the Route 40 Design Manual.
3. Develop design guidelines defining the desired character of Korean Way specifically, evoking relevant architectural elements in that portion of the Route 40 Corridor's built structures, site layouts, signage and landscaping.
4. Leverage partnerships and funding opportunities with local, regional, State and federal governments and nonprofit organizations to prioritize and implement multi-modal improvements along the Route 40 Corridor and at intersections leading back into surrounding residential communities.



Downtown Columbia

The Downtown Columbia Plan (DCP), adopted in 2010, and incorporated by reference in HoCo By Design, sets forth a 30-year plan to transform Downtown into a major mixed-use economic center for the County. The DCP includes 4.3 million square feet of new office and conference center space, 1.25 million square feet of new retail space, and up to 640 hotel rooms to be developed in phases over its 30-year timeframe. By providing space for current employers to expand and opportunities for new and relocated businesses, this additional commercial space is expected to generate significant new employment opportunities and millions of dollars in wages and tax revenues.

The DCP also calls for 6,244 new residential housing units. More residents living in Downtown Columbia will create an active pedestrian environment, as well as customers for shops, restaurants, and other entertainment uses during and after normal working hours. Additional housing will contribute to more activity in the Downtown area both day and night, enhancing the safety of residents, workers, and visitors.

In addition to plans for new residential, office, retail, and hotel development, the DCP includes recommendations for arts and culture, recreation and open space, environmental sustainability, and reconfigured road and pedestrian networks, all aimed at redeveloping Downtown Columbia into a mixed-use urban center. HoCo By Design carries this vision forward and creates a separate Downtown Columbia Character Area in the FLUM that is supported and implemented through the DCP



Gateway

In addition to Downtown Columbia, the Gateway area—located generally north and west of Interstate 95 and Route 32 and south and east of Route 175 and Snowden River Parkway—represents one of the last large potential growth centers in Howard County. The area, comprised of over 1,000 acres and situated along a major interstate, is poised to be the County's next big mixed-use center and will help accommodate future jobs and housing demand. HoCo By Design's Focus Areas Technical Appendix discusses in more detail the economic opportunities in Gateway's development as a Regional Activity Center and lays a foundation for a future master plan for Gateway.

Maple Lawn

Maple Lawn is a large, planned community built under the Mixed-Use District (MXD) overlay zone situated in the southeastern portion of the Planned Service Area. This neo-traditional neighborhood contains a mix of residential, retail, and commercial buildings oriented to streets and prominent public open spaces. Maple Lawn has been constructed in phases following the approval of its comprehensive sketch plan in 2007, which established maximum permitted uses, including 1.86 million square feet of commercial office and retail space and 1,340 residential units. As of early 2022, the majority of the community's approved commercial office and retail space has been constructed and filled by businesses, and a new office building was proposed for construction on the community's last undeveloped employment use parcel. Businesses have cited the community's walkable amenities as an attraction, and the Howard County Economic Development Authority (HCEDA) has observed continued demand for commercial spaces in Maple Lawn despite the economic downturn caused by the Covid-19 pandemic. The HCEDA observed a similar continuing demand for Downtown Columbia as well, indicating sustained business interest in walkable, mixed-use centers.

Western Howard County

Western Howard County contains the majority of the County's farms and farm acreage. Existing conditions, policies, and implementing actions pertaining to the agricultural industry are described at the end of this chapter. Western Howard County is also home to several small traditional business crossroads and more recently built suburban shopping centers.

HOWARD COUNTY ECONOMIC DEVELOPMENT AUTHORITY

The Howard County Economic Development Authority (HCEDA) is a quasi-governmental organization whose mission is to be a catalyst for economic growth and stability in Howard County. HCEDA performs an essential public function in promoting and enhancing the economic welfare of the County through its programs to encourage job creation, retain existing businesses, and attract new businesses. HCEDA promotes small business growth, entrepreneurship, and innovation, and assists companies with land and building selection, financing, employee recruitment and training, permit and regulatory issues, and other development support services. HCEDA is tasked with producing a strategic economic development plan for the County every five years, the goals of which are guided by the General Plan.

The 2017 Strategic Economic Development Plan acknowledges that a lack of available land is a major hurdle to attract new businesses, thus placing a renewed emphasis on expanding and retaining existing firms and scaling up start-up firms. One such program is HCEDA's Maryland Innovation Center, which assists start-ups with technology, resources, and mentorship to innovate and grow locally. This type of support will become increasingly important as new industries and trends emerge and as working environments shift to a broader digital economy.



Retaining Industrial Lands

Industrial land loss is common in urban and suburban areas where higher-value commercial and residential uses compete for scarce land supply. However, industrial jobs, particularly the manufacturing, distribution, and warehousing sectors, not only supply the region with goods but also address wage inequality by providing middle-income wages in jobs that do not require an advanced education, as shown in Table 5-5. With only 3% of the land in Howard County available for industrial uses and a limited supply of large industrially zoned properties, the County must enact policies and regulations and make thoughtful planning decisions that ensure the long-term viability of the industrial economy.

Table 5-5: Howard County Annual Average Employment and Wages by Industry

| CALENDAR YEAR 2020 | | |
|---|---------------------------|--------------------------------|
| INDUSTRY | ANNUAL AVERAGE EMPLOYMENT | AVERAGE WEEKLY WAGE PER WORKER |
| GOVERNMENT SECTOR -- TOTAL | 16,210 | \$1,329.00 |
| Federal Government | 740 | \$1,598.00 |
| State Government | 1,731 | \$1,369.00 |
| Local Government | 13,740 | \$1,309.00 |
| PRIVATE SECTOR TOTAL -- ALL INDUSTRIES | 145,159 | \$1,553.00 |
| GOODS-PRODUCING | 19,932 | \$1,553.00 |
| Natural Resources and Mining | 301 | \$1,001.00 |
| Construction | 10,962 | \$1,516.00 |
| Manufacturing | 8,669 | \$1,620.00 |
| SERVICE PROVIDING | 125,223 | \$1,552.00 |
| Trade, Transportation, and Utilities | 32,526 | \$1,287.00 |
| Information | 3,588 | \$3,040.00 |
| Financial Activities | 9,480 | \$1,927.00 |
| Professional and Business Services | 45,528 | \$2,080.00 |
| Education and Health Services | 18,278 | \$1,061.00 |
| Leisure and Hospitality | 11,894 | \$476.00 |
| Other Services | 3,929 | \$916.00 |

Source: Maryland Department of Labor

— ☺ —

Route 1 has been industrial for decades and has the infrastructure. Industrial is important to the County tax base and needs to be encouraged.

— ☺ —

-HoCo-By-Design-process-participant

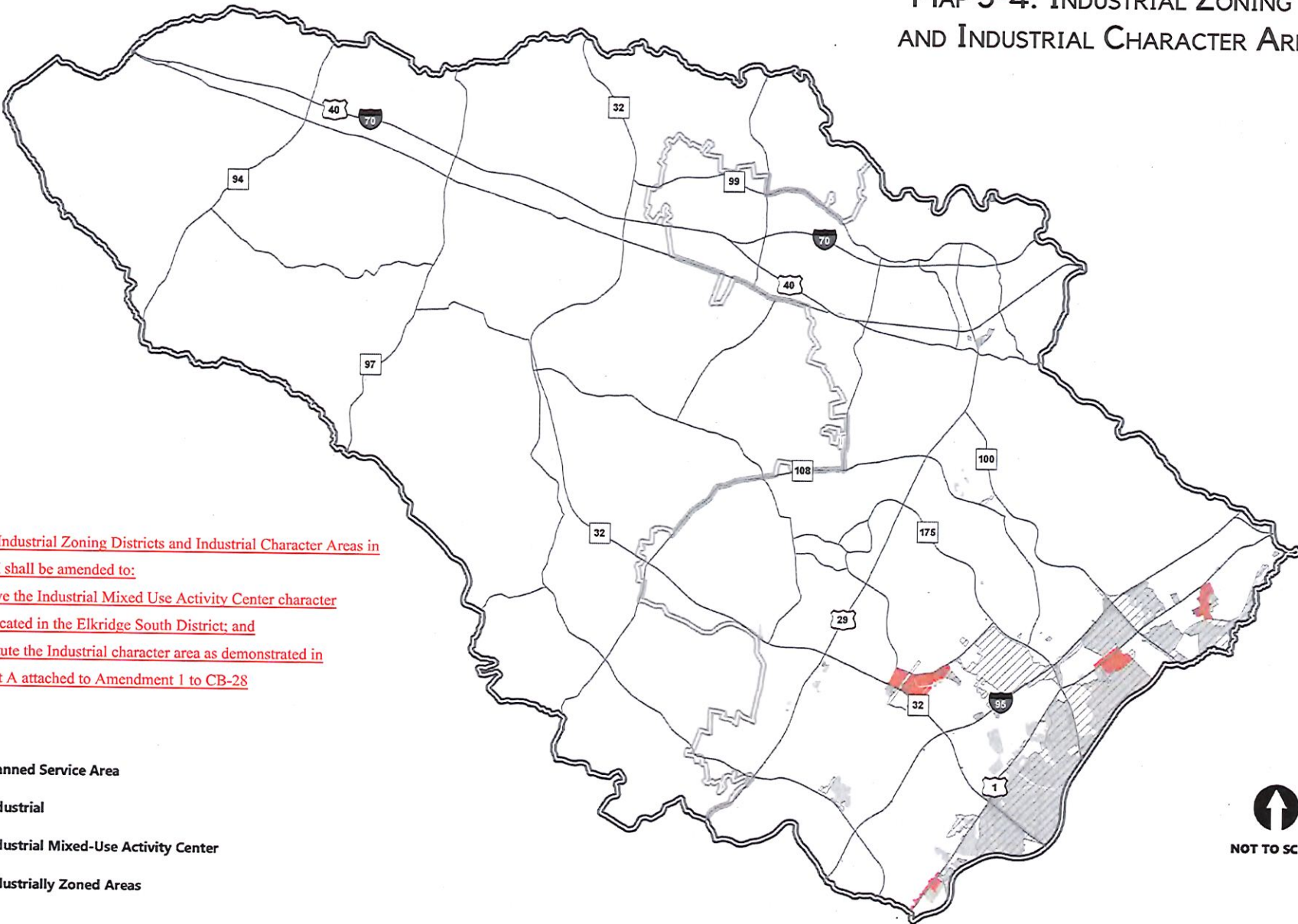
HoCo By Design establishes two industrial based character areas: Industrial and Industrial Mixed-Use. The Industrial Character Area supports both larger-scale, single-user industrial, warehouse, and flex spaces and smaller, multi-tenant industrial buildings that are clustered and support one another. The Industrial Mixed-Use Character Area is designed with Route 1 activity centers in mind. This character area is applied to select nodes along the Corridor that are positioned for mixed-use development but contain existing industrial uses that may be integrated into future redevelopment, as shown in Map 5-4. This character area advances dual goals of providing redevelopment opportunities and preserving industrial uses.

As noted earlier in this chapter, while most of the County's industrial land uses are located in the Route 1 Corridor, a portion is located in eastern Columbia. While challenges like truck access exist, industrial uses should continue to be part of the area. During the Zoning Regulations update, the County should ensure that existing industrial uses are able to continue or expand operations.

Future industrial uses along the Interstate 70 corridor should be supported. However, they should be designed with sensitivity to the surrounding rural context and be able to operate on well and septic systems.



MAP 5-4: INDUSTRIAL ZONING DISTRICTS AND INDUSTRIAL CHARACTER AREAS IN THE FLUM



Map 5-4: Industrial Zoning Districts and Industrial Character Areas in the FLUM shall be amended to:

- Remove the Industrial Mixed Use Activity Center character area located in the Elkridge South District; and
- Substitute the Industrial character area as demonstrated in Exhibit A attached to Amendment 1 to CB-28

- Planned Service Area
- Industrial
- Industrial Mixed-Use Activity Center
- ▨ Industrially Zoned Areas



EP-1 Policy Statement

Retain and expand the use of industrial land to support employment opportunities that pay a living wage.

Implementing Actions

1. As part of the Zoning Regulations update, consider protective measures to ensure an adequate long-term supply of industrial land, such as additional requirements or impact statements for rezoning industrial land, zoning that discourages incompatible uses in heavy industrial areas, heavy buffer requirements for non-industrial users locating near heavy industrial land, or industrial overlay zoning for prime industrial land.
2. Determine how compatible uses can co-locate in designated Industrial Mixed-Use character areas to support industrial operations and create an active sense of place.
3. Prioritize for retention industrial land that is uniquely accessible to regional highways for continued industrial use.
4. During the Zoning Regulations update or via Zoning Amendments, favorably consider context-sensitive industrial uses along the Interstate 70 corridor.

EP-2 Policy Statement

Ensure redevelopment is consistent with the character of industrial areas.

Implementing Actions

1. Update the Route 1 Design Manual to include Industrial Mixed-Use character areas and incorporate buffers between redevelopment areas and industrial areas.

— 66 —

The Plan needs to anticipate a changing economy and create economic opportunities for new enterprises and a diverse economy.

— 66 —

—HoCo By Design process participant

Growing Emerging and Significant Industries

Howard County has a strong local economy and serves as a regional employer. As shown in Table 5-2, Howard County's major employers represent a diverse set of industries. Strong and significant industries in the County include cybersecurity, information security, information technology, green technology, higher education, research and development, and finance. The nonprofit sector also plays an important role in the County; according to Maryland Nonprofits, Howard County was home to 2,094 nonprofits in 2019 (the largest of which was the Columbia Association). To maximize Howard County's economic competitiveness in the region, economic development should support emerging and significant industries to continue to diversify employment opportunities. By keeping apprised of changing economic trends, Howard County will be able to attract new and diverse industries that support expected job growth. This economic development focus should include the manufacturing, distribution, and logistics industries, which are responding to changes in consumer trends.

The green or environmental industry is another important and emerging employment sector. According to the Bureau of Labor Statistics, green jobs are "jobs in businesses that produce goods or provide services that benefit the environment or conserve natural resources" or "jobs in which workers' duties involve making their establishment's production processes more environmentally friendly or use fewer natural resources." Investment in the environmental sector accomplishes multiple sustainability goals. The environmental sector tends to endure through economic downturns, bolstering a sustainable economy. This sector traverses multiple industries and creates a significant job pool accessible to a variety of skill sets. By creating opportunities for workers without a college degree, green jobs promote economic mobility and help to close the opportunity gap. Importantly, green jobs also promote environmental sustainability through more efficient energy consumption, reduced greenhouse gas emissions and waste, ecosystem protection, and climate mitigation and adaptation.

Policies and the Zoning Regulations should support these emerging and significant industries to ensure a healthy and diverse local economy. This support will ensure that the County will be able to meet the future job demand, as indicated in the market study conducted for this General Plan. Deliberate efforts and investments would demonstrate the County is committed to being competitive to attract and grow emerging industry sectors.

EP-3 Policy Statement

Support and diversify the local job market to maximize opportunities to grow regional employment.

Implementing Actions

1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.

Promoting a Healthy Jobs/Housing Balance

To remain an attractive community for today's businesses and their employees, Howard County will need to support new and emerging industries and promote a healthy mix of employment and housing opportunities. Such opportunities include replacing the traditional single-use office park of the 1980s and 1990s with offices integrated into mixed-use settings, as many new businesses desire to locate in walkable activity centers that offer diverse housing options and an amenity rich environment for their employees.

HoCo By Design proposes a variety of activity center character areas at different scales. Activity centers allow for infill opportunities to co-locate diverse housing options and jobs in compact, walkable, mixed-use environments. Furthermore, through deliberate placemaking, these centers can become destinations that incorporate useable and inviting open space, transportation connections, pedestrian and bike facilities, and other amenities to attract employers.

To be self-sufficient, these activity centers must support a variety of businesses. As noted earlier in this chapter, it is estimated that the existing capacity of 10.1 million square feet of new non-residential space could accommodate 28,300 jobs, based on estimated jobs-to-building space ratios. This capacity reflects an average of 1,415 new jobs per year, or less than half of the 3,000+ new jobs per year added in Howard County over the last 20 years. The Future Land Use Map (FLUM) contains character areas with land capacity to accommodate approximately 7,800 retail, 23,000 office, and 4,200 industrial jobs (a total of 35,000 jobs and an average of 1,750 new jobs per year over 20 years). Much of this capacity to accommodate job growth is attributed to proposed mixed-use activity centers and industrial/flex centers along the Route 1 Corridor. The capacity for 35,000 jobs would still fall short of the market demand of 59,000 new jobs by 2040, as indicated in the Market Analysis and Demand Forecast prepared for HoCo By Design. However, these additional jobs could be accommodated in Gateway, which HoCo By Design envisions will serve as a regional activity center with a strong focus on innovation, education, research, and technology.

There is a close relationship between employment growth and housing demand, with new jobs fueling a need for nearby homes. Howard County has fewer housing units for each job than nearly every other jurisdiction in the region, with an estimated undersupply of more than 20,000 units. This metric does not account for new housing needed to support the targeted 3,000 new jobs per year the County seeks to maintain over the planning horizon.

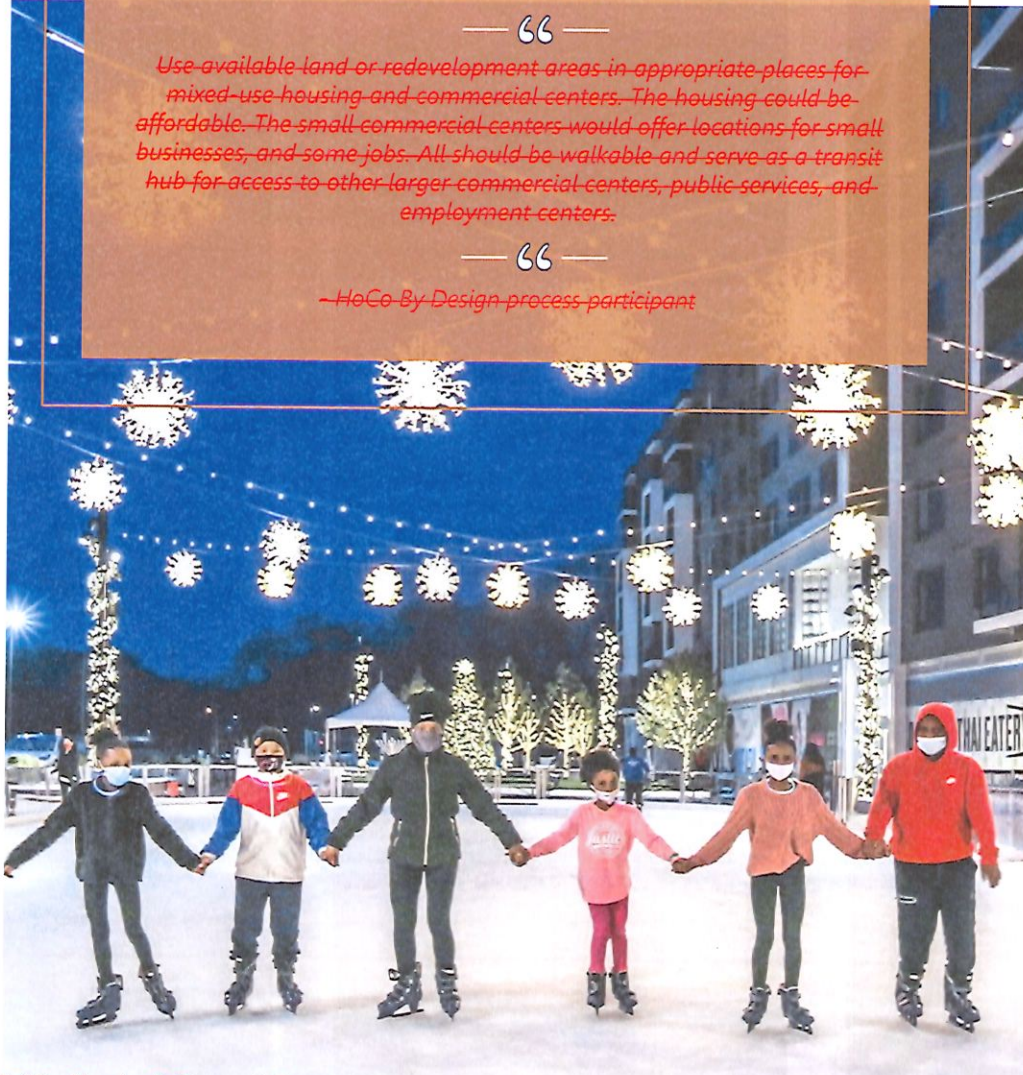
As described in the Dynamic Neighborhoods chapter, the majority of the homes built in Howard County today are higher-end single-family homes. Without more housing choices, it will become more difficult to recruit workers that may be priced out of the local market. Failure to meet the County's workforce housing demands will exacerbate the housing affordability challenge and cause more of the County's workforce to live in neighboring counties—resulting in increased traffic congestion and sprawl.

— “ —

Use available land or redevelopment areas in appropriate places for mixed-use housing and commercial centers. The housing could be affordable. The small commercial centers would offer locations for small businesses, and some jobs. All should be walkable and serve as a transit hub for access to other larger commercial centers, public services, and employment centers.

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— HoCo By Design process participant



Greater housing diversity increases economic diversity, contributes to wealth expansion, creates new investments, and drives community growth by attracting young professionals, entrepreneurs, and workers with varied educational and professional backgrounds. While housing is primarily provided by the private sector, public policies will help to ensure a healthy balance of housing at different price points located in the right places. Map 5-5 shows the current locations of housing types relative to activity center locations. As activity centers grow, they can serve as locations for both jobs and housing and can provide amenities and job opportunities to the existing communities surrounding them.

EP-4 Policy Statement

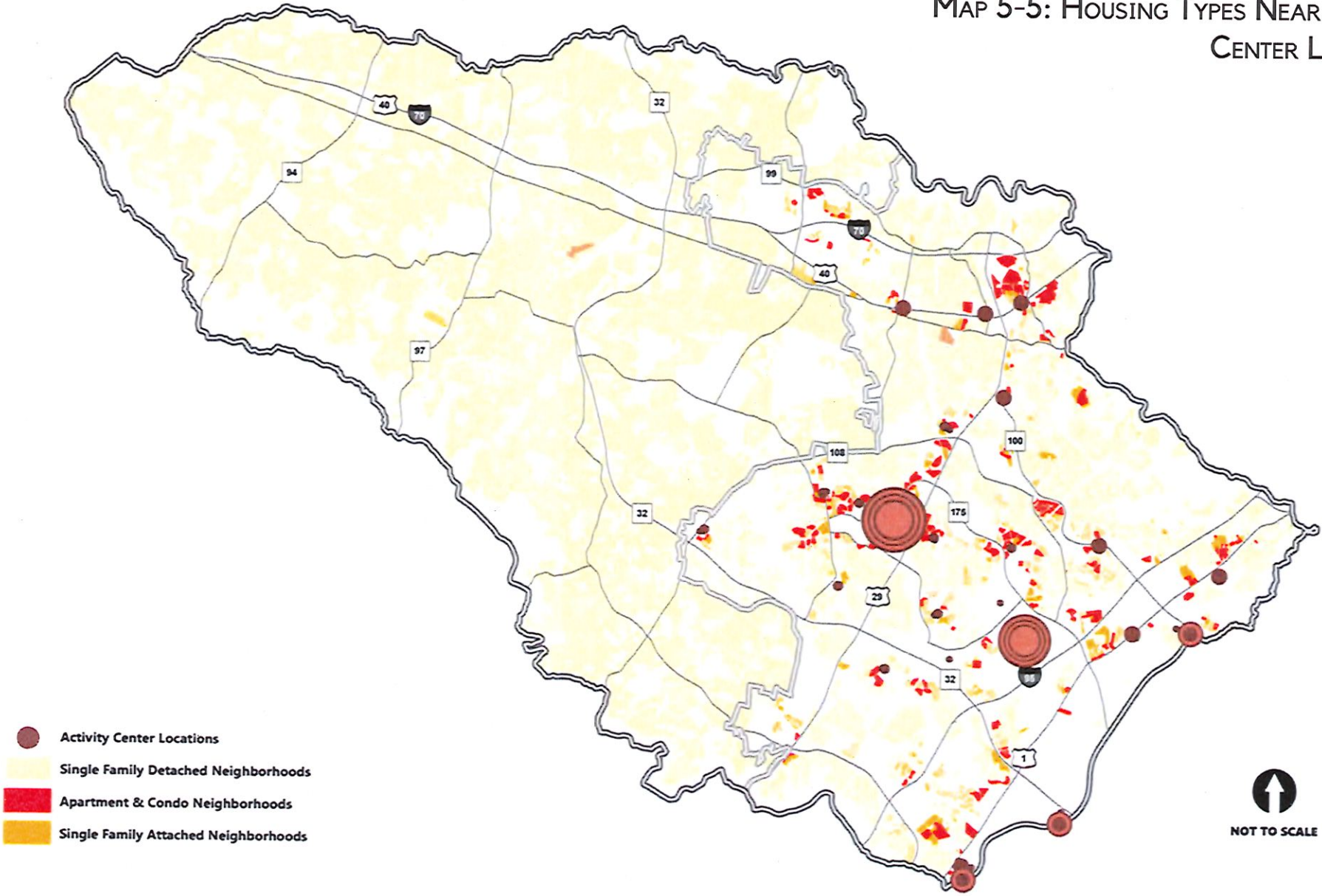
Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.

Implementing Actions

- ~~1. Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.~~
- ~~2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village activity center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.~~
- ~~3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.~~
- ~~4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.~~
- ~~5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.~~
- ~~6. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.~~



MAP 5-5: HOUSING TYPES NEAR ACTIVITY CENTER LOCATIONS



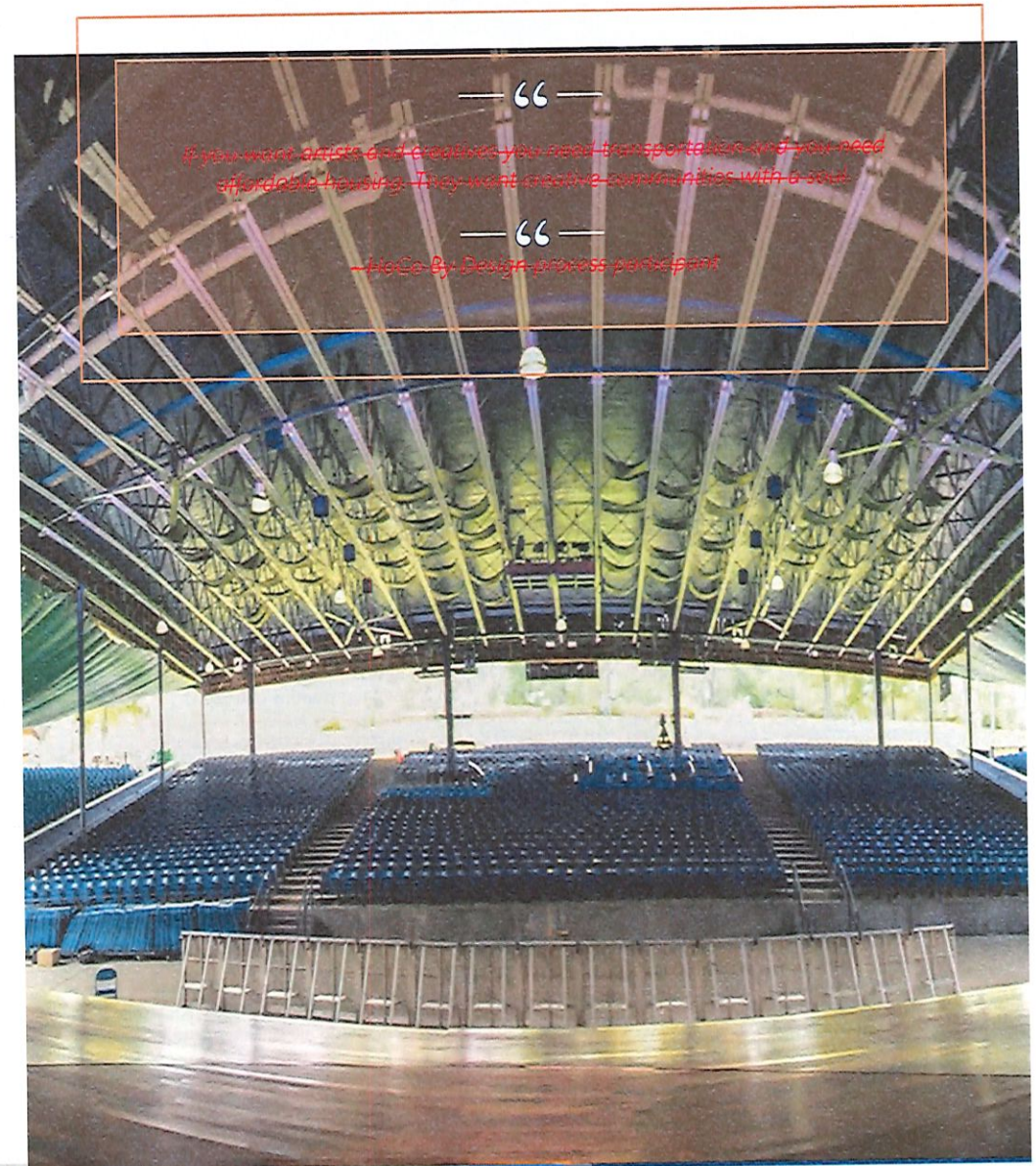
Creating Economic Vibrancy through Arts and Culture

The arts and cultural initiatives are important to many Howard County residents and businesses, enhancing the quality of life and helping to establish a unique sense of place. Such activities also greatly benefit local tourism, offering a destination to those who wish to experience something new and special. Public art instills beauty, character, and a noteworthy signature to particular locations and environments. Incorporating the arts and cultural initiatives into activity centers, main streets, and mixed-use business districts will help to spur further economic activity in these areas of the County.

Artistic and cultural activities, including but not limited to the visual arts, cinema, music, dance, theater and distinctive cultural events, offer opportunities to showcase Howard County's diverse population. The Howard County Arts Council currently advocates and provides for many unique and diverse art experiences in the County. Among the organization's core values is the goal of "cultivating a diverse and inclusive arts culture." The Arts Council operates the multi-purpose Howard County Center for the Arts facility, which provides studio and meeting space and features galleries, classes, and events. The Howard County Tourism Council (Visit Howard County) markets the County as a premier leisure and business travel destination. The Tourism Council collaborates with the County's tourism community "to drive new visitor demand, promotion, product development, and education and advocacy." It will be important to continue to support the Arts Council and Tourism Council, and build upon the work that they do to benefit residents, businesses, and tourists into the future.

At Long Reach Village Center, the arts are an important component of the Long Reach Rising revitalization initiative. The Columbia Art Center has long served as a cultural anchor at the village center and offers gallery space, an artisan shop, and educational programming. The African Art Museum of Maryland, which increases awareness of diverse cultural expression through exhibition of African art, moved to the village center in 2020. Also that year, the Howard County Arts Council began a satellite program to lease studio space to artists at the village center.

Arts and culture are featured prominently in the Downtown Columbia Plan (DCP), which acknowledges the vital role of public art and cultural activities in shaping the cultural history of Columbia. The DCP envisions a dynamic and continuously increasing role for visual and performing arts and identifies locations throughout downtown for public art. The DCP's adoption codified requirements for art in private downtown development. Merriweather Post Pavilion serves as an existing cultural anchor for Downtown Columbia. This open-air concert venue draws many thousands of concert goers annually, and is surrounded by Symphony Woods and the Chrysalis amphitheater, which provide space for festivals and community events.



— “ —
If you want artists and requires you need transportation and you need affordable housing. They want creative communities with a soul.

— “ —
HoCo By Design process participant

A countywide arts and culture center in Downtown Columbia was envisioned by the community over 10 years ago and was ultimately incorporated into the DCP. ~~This vision became reality in 2016 when the New Cultural Center (NCC) was included in the affordable housing plan for Downtown Columbia as one of the public amenities that would also provide mixed-income housing.~~ The NCC is a redevelopment project planned at the current site of Toby's Dinner Theater. The NCC will include a new theater and commercial kitchen, two black box theaters, a gallery, dance studios, various classrooms/performing arts rooms, and mixed-income housing.

The Ellicott City Watershed Master Plan (ECWMP) supports the expansion of arts-related uses and public art in the Main Street area. It recognizes the potential to grow arts and entertainment offerings, build upon existing arts-related events, and give public art a prominent role in the community. Among its policies and implementing actions, the ECWMP recommends that upon expansion of arts-related uses in the area, a Maryland Arts Council, Arts and Entertainment District designation be re-explored. As described in the ECWMP, "Maryland's A&E Districts provide local tax-related incentives to attract artists, arts organizations, and other creative enterprises to towns and cities within the State." Support for additional arts and entertainment uses in Ellicott City may include incentives, reduced rent, or space in county-owned buildings.

In all of these destinations, investments in design value and quality of the public realm create safe and inviting spaces for pedestrians and cyclists, better wayfinding, improved landscaping, enhanced stormwater management, and spaces for civic gatherings, outdoor events, cultural activities, and the arts. The public realm is further described in the Quality By Design chapter.



EP-5 Policy Statement

Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses, and visitors that reflect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.

Implementing Actions

1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, including
3. ~~Re-explore~~ establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.
4. ~~3.~~ Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.
5. ~~Continue to integrate the arts into revitalization efforts at Long Reach Village Center.~~
5. Continue to integrate the arts into revitalization efforts at Long Reach Village Center.
6. ~~4, 6.~~ Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.
7. Continue to ensure arts and craftsmanship are an integral part of Savage revitalization and explore incentives to support their expansion, especially through the sustainable communities program.



Anticipating Future Trends

Economic disruptors and technologies such as autonomous vehicles, teleworking, and e-commerce are likely to lead to demand shifts, requiring future adaptation. New technologies will influence current industries and will likely change land use needs. While in some cases workers will continue to work in office buildings, they may also work in new flex spaces or home offices that are better adapted to the innovation economy. This trend could significantly impact land use demand in Howard County and regionally.

Impact of Covid-19

Despite speculation that Covid-19 and the rise of teleworking would diminish office demand, the need for office space is likely to remain for many businesses and organizations. However, companies are approaching the future of the office differently. Some are shifting to all-remote environments, but most are looking at a hybrid of in-person and remote work in the future. While the internal design of office space may shift to multi-purpose and co-working space, many see the value of a physical office to inspire teambuilding and collaboration. While flagship corporate headquarters may no longer be needed to attract employees, small-scale and regional offices will likely remain in demand. With more employees opting to work remotely, co-working spaces could become an attractive alternative.

Ultimately, as the demand for office space shifts, the location of available space will drive real estate decisions. Places like Columbia are desirable for many office tenants because they feature a central location in a mixed-use environment, walkability, and proximity to retail and other attractions.

E-Commerce and the Future of Retail

E-commerce sales have grown significantly in the last several years, even pre-Covid-19, leading to a rise in physical store closings. Retailers in Howard County will likely choose smaller retail spaces and rely more heavily on “last-mile” inventories stored in local and regional fulfillment centers. When a retailer offers the option to buy online and pick up in-store, the fulfillment center delivers the inventory on-demand from the warehouse to the retail store. The growing need for last-mile distribution to both personal residences and retail stores will likely increase demand for local and regional warehousing.

Industrial land in places along the Route 1 Corridor could provide spaces for last-mile distribution. In the long term, office parks, suburban retail, and other activity centers may be transformed to reflect shifting business models, and large retail stores may become a mix of an in-store and warehouse pick-up.

Emerging theories and trends about the future of the retail sector are changing quickly and sometimes conflict with each other in terms of the magnitude and timing of expected changes. However, most retail market experts agree that customers’ desires for experience-based destinations in the future favor the type of new mixed-use activity centers proposed for Howard County on the Future Land Use Map (FLUM). Restaurants, entertainment venues, services, and retail storefronts organized around a network of walkable streets and public spaces will likely be competitive assets in the new retail market.

Improved Business Technologies and Automation

Industries are already seeing a shift in increased levels of artificial intelligence incorporated into their business models. This trend is likely to impact most industries in the long run, with near-term impacts affecting industrial and office users more than others. New and large machinery and automated processes will require roomier and different types of industrial space with less need for a human workforce as jobs are replaced by machines. Improved and efficient construction techniques may give rise to more affordable manufactured and modular housing. Autonomous check-in and online accommodation marketplaces (such as Airbnb and VRBO) will likely continue to change the hospitality industry in the future.

Autonomous Vehicles

~~Daily commuting is an essential part of life for many Howard County residents and workers. Like the shifts toward telecommuting and innovative workplaces and businesses, autonomous vehicles may alter commuting patterns in the County. Autonomous vehicles, through the deployment of ever-evolving technology, are expected to increase traffic efficiency and reduce travel times. With more efficient commutes, residents could have greater choices in where they wish to live.~~

~~Howard County stands to benefit from autonomous vehicles as reduced commute times may attract workers who currently live closer to large employment centers like Baltimore and Washington, DC. The County may experience an uptick in residential demand if autonomous vehicles become more commonplace and if workers therefore grow less apt to want to live in large city centers.~~

~~Additionally, if the use of autonomous vehicles (or non-vehicular options including electric bicycles, transit, etc.) grows, the need for large parking lots will decline, increasing the availability of land for new housing and businesses. Reduced parking requirements would decrease development costs and increase the opportunity to meet future housing and job demands.~~

EP-6 Policy Statement

Monitor economic disruptors, such as new technologies, autonomous vehicles, teleworking, and e-commerce, and employ adaptive and innovative strategies to meet emerging economic shifts.

Implementing Actions

1. Assess and adapt the Zoning Regulations to provide greater flexibility under broader use categories and respond to changing industries and technologies.
2. Continue to intentionally grow jobs in the manufacturing, warehouse, distribution, and logistics industries in response to last-mile distribution demand, new machinery, innovation practices, and other automated processes.
3. Consider reduced parking ratios for commercial uses if the adoption of ~~autonomous vehicles, other new technologies, or~~ shifts in behavior ~~lead~~ **lead** to reduced parking demand over the Plan’s 20-year timeframe.


ExPanding Economic OPPortunity through Workforce and Small Business dEVELOPmEnt

Access to Education and Jobs

Access to education, training, and skills development is critical to closing the opportunity gap in the workforce. Investing in local talent and human resources keeps residents from commuting elsewhere for jobs, improves their quality of life, reduces greenhouse gas emissions and traffic congestion, and keeps dollars circulating in the local economy. Workforce development initiatives provide investment in human capital and can be particularly helpful to individuals of limited financial means. The Howard County Office of Workforce Development, Howard County Economic Development Authority, Howard Community College, and the nonprofit community are all involved in developing a skilled workforce in the County, through career training, professional certification, and apprenticeship programs. The Howard County Public School System offers high schoolers education in specific industries (such as cybersecurity, computer programming, biotechnology, and many other industries) through its career academies. Vocational and technical training should be made accessible to residents near their neighborhoods and at community centers and facilities served by transit. To ensure underserved populations can participate in training, entities involved in workforce development should partner to offer resources such as child care. Training should also support skills that provide living wages. Well-paying industrial jobs, which require training and certification but less than a four-year college degree, could grow in the future.

The Covid-19 pandemic has spurred increased awareness of the importance of broadband access throughout the County. During the pandemic, high-speed internet access was an essential component of remote learning for children and employment for adults. Those without access were left behind academically and economically. It is important to invest in reliable, affordable broadband in underserved areas.

EP-7 Policy Statement

 Support an educated and skilled workforce with specific attention and resources devoted to breaking barriers to employment and education while achieving greater racial and social inclusion in the workplace.

Implementing Actions

1. Increase job training, internships, and job placement to overcome barriers to employment and achieve greater racial and social inclusion in the workforce.
2. Partner with organizations that specialize in workforce development to help those experiencing multiple barriers to employment access education, apprenticeship programs, and training opportunities aligned with in-demand local workforce needs.
3. Ensure job training programs support skills that provide living wages.
4. Communicate the available jobs in the region and identify the skills workers need to be successful.
5. Invest in reliable affordable broadband to ensure that lower-income residents have equal access to education and employment opportunities.




Supporting Small, Local, and Minority-Owned Business

Many local businesses provide inviting places to connect with other community members. They are often family-owned and offer fresh, customized approaches that are not found in chains or big-box outlets. However, despite the unique and creative experience these businesses provide, they are traditionally more susceptible to changing economics and redevelopment pressures. Over the past several years, small businesses have faced pandemic disruptions, supply chain problems, and staffing shortages. These recent challenges have left some small businesses struggling to remain afloat, with minority-owned enterprises among the hardest hit.

As technological advances continue to lower the costs of launching new businesses, opportunities for economically-disadvantaged entrepreneurs grow. Ongoing support is critical to assist small local businesses in Howard County as economic changes and redevelopment occur to retain small, culturally diverse businesses that support the local community. Throughout the HoCo By Design public engagement process, small business owners voiced concerns about being priced out of owning a business and noted village centers as ideal locations for small businesses today and a redeveloped Gateway as ideal for the future.

EP-8 Policy Statement

 Encourage a business climate that supports growth of and opportunities for small and diverse businesses, and values cultural diversity and inclusion.

Implementing Actions

1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and Maryland Small Business Development Center.
5. Through adaptive reuse and redevelopment, particularly within village centers, particularly within activity centers, provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.

— “ —
There is a lack of local business growth, and especially businesses-owned by people of color. Ownership needs to be within reach and other financial supports to get started as it's currently cost prohibitive.
— “ —
~HoCo By Design process participant



Sustaining our Agricultural Economy

Agriculture is an important economic driver in Maryland that contributes to Howard County's thriving economy. According to the 2017 US Department of Agriculture (USDA) Census of Agriculture, farming in the County directly contributes approximately \$27.3 million annually, with an overall economic impact of \$43.7 million. The key contributors to the agricultural economy are horticulture, crop production, livestock production, equine operations, direct to consumer enterprises, and agritourism.

Agriculture in the County faces significant challenges. The availability of affordable farmland, particularly for the next generation of potential farmers, labor shortages, impediments to accessing agricultural infrastructure, and the high cost of insurance threaten the long-term viability of farming. Input costs continue to rise, and profit margins remain slim, which is a reality for agricultural producers nationally and locally. Climate change adds a layer of uncertainty to these challenges. Additionally, conflicts with residential neighbors over on-farm uses restrain farmers' ability to experiment with potentially higher-income operations that draw large numbers of people to the farm.

On the other hand, Howard County offers unique opportunities for farms to diversify their sales channels. County farms are close to residential neighbors who have a growing desire for locally-sourced food and an interest in visiting nearby farms for product, entertainment, and agricultural education. Howard County Government hosts an agricultural subcommittee representing several agencies that, together, buttress the industry through technical and financial assistance and farm-friendly policies and regulations.

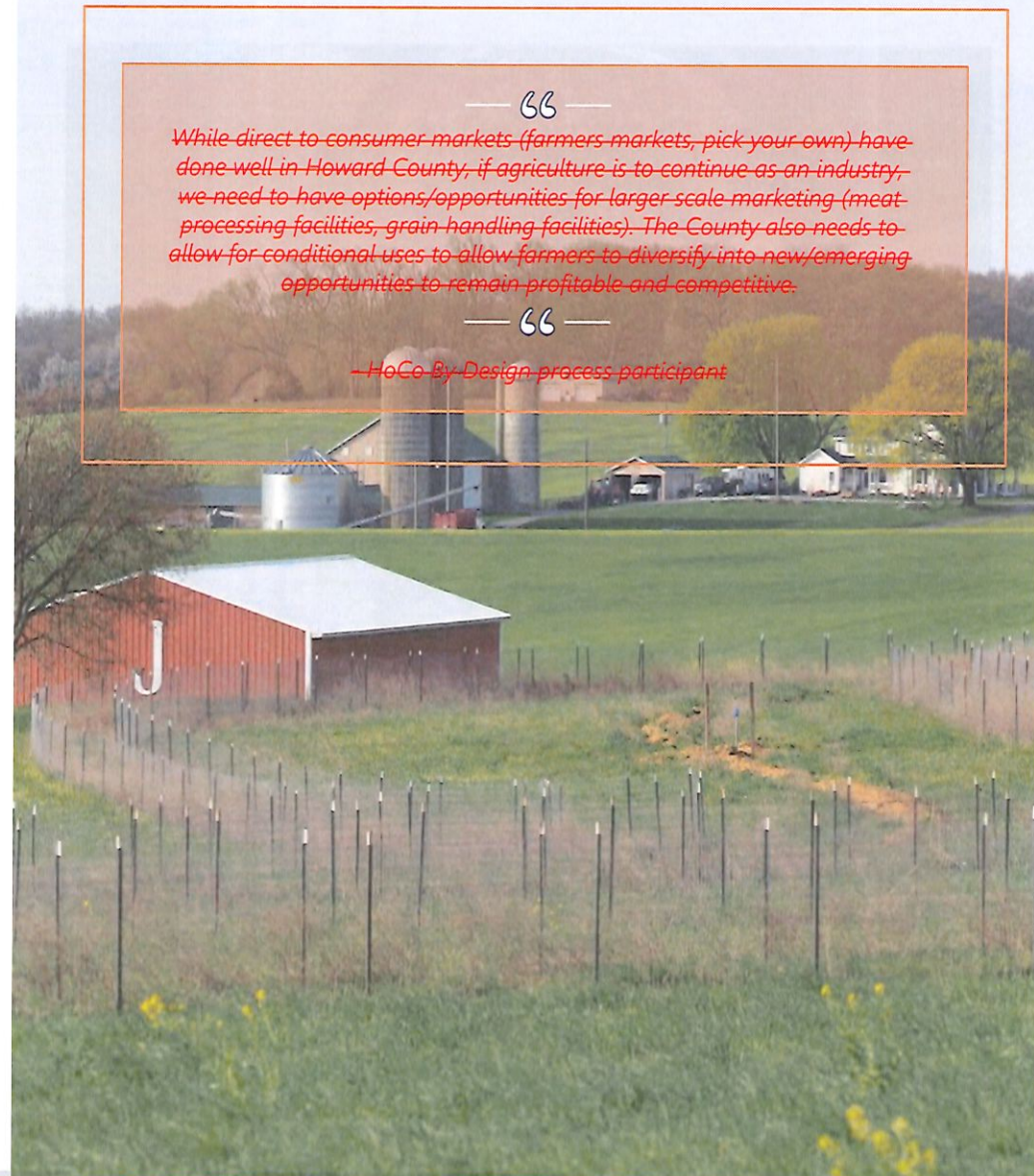
As agriculture continues to evolve, the farming community will need flexible and prompt support to prosper and remain competitive. Howard County farmers have been on the forefront of innovation and diversification for years, due to both the challenges and opportunities they face. County policies and regulations should continue to keep pace with changes to farming in the future.

Current Status and Trends

Much of the data that informs the policies and implementing actions for the agricultural industry is derived from the USDA Census of Agriculture, which is conducted every five years and was last completed in 2017. The Census is based on self-reporting and is the most comprehensive source of information regarding agriculture in the County. A detailed analysis of the data provided by the last several USDA Censuses is provided in the Agriculture Assessment prepared for HoCo By Design.

Farmland

In 2017, 321 farms responded to the USDA Census of Agriculture in Howard County. Together, they accounted for 32,436 acres of farmland. USDA's definition of a farm is any place from which \$1,000 or more of agricultural products will be sold or normally are sold within any given year. Compared with Census figures over the previous 15 years, the general trend shows a gradual rate of decline in farm numbers and farm acreage.



— “ —
While direct to consumer markets (farmers markets, pick your own) have done well in Howard County, if agriculture is to continue as an industry, we need to have options/opportunities for larger scale marketing (meat processing facilities, grain handling facilities). The County also needs to allow for conditional uses to allow farmers to diversify into new/emerging opportunities to remain profitable and competitive.

— “ —
—HoCo By Design process participant

Farms are becoming smaller in acreage within the County, with the average farm size declining by 7% between 2002 and 2017. In that same time frame, the number of farms that were less than 10 acres increased by 63%. There are many possible explanations for this change, including increases in retirement among farmers and the ability to produce many crops on smaller acreages.

Farming by Industry

The 2017 Census reports these statistics:

- About 39% of farms are involved in crop production, mostly corn, soybeans, and wheat.
- The other 61% of farms are involved in livestock production.
- Sales involving cattle and milk generated most of the value.
- The inventory of sheep and goats has increased, part of a growing trend towards grazing operations.
- About 14% of the farms were involved in "other crop farming."

The "other crop farming" sector is important because it covers the production of hay, which is crucial for supporting the County's equine, cattle, and dairy operations. Other crop farming also covers diversified farms such as community-supported agriculture (CSA) operations that focus on produce and flowers.

Approximately 31% of the farms were involved in "other animal production." This sector includes farms primarily engaged in raising one or more of the following: bees, horses and other equine, and rabbits and other fur-bearing animals. The equine industry is significant to the County's economy, but its impact goes beyond the total asset value. These operations are essential for maintaining a critical mass in demand for large animal veterinarians, agricultural services, farm supplies, and farm equipment. Additionally, the Census indicated that there were 30 honey operations in Howard County in 2017.

Direct-to-consumer sales, which includes farmers markets, farm stands, CSA, and pick-your-own farms, generated \$3.5 million in 2017. In 2022, the County had five farmers markets, six CSAs, and two pick-your-own farms. In addition, value-added processing and direct-to-retail sales amounted to \$1.1 million and are two important strategies farmers can use to improve their profitability. Value-added processing includes taking raw or whole food products and creating new products that are then sold at a higher price (for example, taking fruit grown on the farm and processing it into jam). Value-added processing also includes producing a product in a way that enhances its value, such as growing vegetables organically.

Interest in the local farm-to-table experience has increased among both consumers and farmers, a connection that is fostered by the County through the Roving Radish program. The Roving Radish promotes healthy eating habits in the community by selling meal kits with locally-sourced ingredients. The meal kits are available to all County residents and are offered at a discounted price to income-qualifying households. Additionally, the Roving Radish provides a marketplace that has been an outlet for local farms to sell their products.

Finally, [demand for](#) agritourism in Howard County has grown rapidly over the last decade, with 19 farms holding special farm use permits for agritourism uses as of January 2023. Agritourism enhances income potential [for farmers and exposes the public to agriculture](#) by using agriculture and tourism to attract, entertain, and educate visitors. Popular examples in Howard County include petting farms, programs for school children, and seasonal activities, such as pumpkin picking and corn mazes. Also included in this category are farm breweries, wineries, and cideries, which are growing in popularity and demand across the

region. There is also growing interest in farm stays, or overnight accommodations on working farms (regional examples include farmhouses, cottages, tents, and yurts). The County should update the Zoning Regulations to incorporate a definition of farm stays as a special farm use.

Critical Infrastructure

The agricultural industry requires certain infrastructure to serve its basic needs and allow it to diversify and remain profitable. These include transportation, access to new technologies, processing facilities, technical assistance, and funding for business development.

Transportation

Farm equipment can be slower, taller, and wider than residential and commercial vehicles, a circumstance that can prevent farmers from using them safely on local roads. Problems like a lack of clearance under overhanging trees or difficulties with passage at narrow bridges can delay passage for the farm equipment, as well as local traffic, which in turn can cause conflicts between agricultural and other users on the roads.

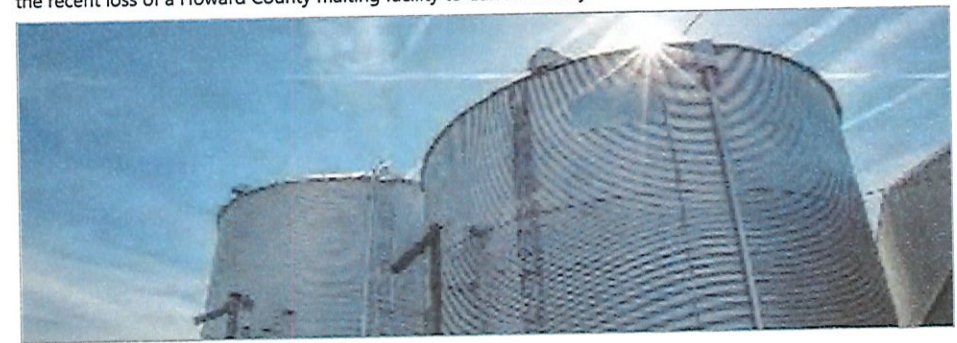
Internet Access

The County's farmers are well-connected to the internet, with about 86% having access. The use of cell phones and other mobile devices is increasingly popular as farms shift to integrating new technologies and applications, such as using GPS to increase harvesting efficiency.

Processing, Manufacturing, and Aggregation Facilities

There are few local food processing and manufacturing facilities that support the major commodities (dairy, grain, and beef) produced in the County. Two fluid milk processing plants remain: the Maryland & Virginia Milk Producers Cooperative and the Dreyer's ice cream plant, both located in Laurel. Wilkins Rogers, the closest flour mill, located in Baltimore County, closed in 2020.

Some local farms have been growing barley, rye, hops, and aronia for the brewery and distillery industries, as well as cleaning and roasting seeds. As compared to neighboring jurisdictions, County regulations are generally restrictive of on-farm activities involving microbreweries, wineries, distilleries, and cideries. This is evidenced by the recent loss of a Howard County malting facility to Carroll County.



Additionally, there are no USDA-inspected meat processing facilities in the County. While there are several located in Baltimore, Carroll, and Frederick Counties that are feasible to access, these operations are often at capacity. Many farmers find themselves having to transport their livestock to adjacent states. The lack of large-scale processing and manufacturing capacity in the County makes it challenging for farms to get their product to market, other than by direct-to-consumer or direct-to-retail sales. As a result, remaining operations are forced to transport product to other counties or states, increasing costs and losing economic opportunity for the County.

Howard County is also home to the Maryland Food Center Authority (MFCA) which provides critical infrastructure for the aggregation and wholesale distribution of food throughout the state. Totalling almost 400 acres, MFCA comprises the Maryland Food Center, which includes the Maryland Wholesale Produce Market and the Maryland Wholesale Seafood Market, a cross-dock facility, and a truck parking lot. These terminal markets will also need to adapt to changing buyer needs. Various fruit and vegetable processing operations can be found in the eastern half of the County and are generally related to the large concentration of food wholesalers in and around the Maryland Food Center in Jessup.

Some farmers engage in value-added processing on their farm, while others send their products elsewhere for processing. Value-added processing requires an upfront investment in equipment and expertise, which may not be feasible for farms with low profit margins. Farmers wishing to expand and diversify their operations through value-added processing would benefit from having access to appropriately equipped and licensed commercial processing and kitchen facilities. These facilities could also benefit food businesses involved in processing or manufacturing that may be looking to support local farms. These facilities should be located strategically to easily access consumer markets and to provide efficient inbound deliveries from suppliers. The Howard County Economic Development Authority (HCEDA) has been working for several years to bring a commercial kitchen to the County that would fill these needs.



Similarly, in May 2018, BioEnergy DevCo broke ground at MFCA to establish a biodigester that creates energy from food waste. These types of developments are important as the County works to improve sustainability and meet the state's renewable energy goals.

Technical Assistance

The Howard Soil Conservation District (HSCD) provides planning services to farmers for the design of best management practices (BMPs) to address soil conservation and water quality protection on their farms. HSCD also provides assistance for farmers to access federal, state, and/or county government cost share funds for BMP implementation. These BMPs not only improve farming practices but also help farmers meet regulatory requirements for their farm operations. Cost share funds help pay for 50-100% of a best management practice, depending on the program and practice. However, a farm must meet minimum operation size requirements to qualify for certain programs, leaving smaller operations at a disadvantage. In addition, cost-share reimbursements are based on a flat rate for the State, which does not address differences in labor or material costs due to local conditions.

Business Development Funds

The HCEDA Agriculture Marketing Program assists the farming community to access grants and financing to start or diversify their operations. Funding sources include Howard County, the Maryland Agricultural & Resource-Based Industry Development Corporation (MARBIDCO), Mid-Atlantic Farm Credit, and the USDA. Grants and loans are available for producers to buy crop insurance, expand and diversify their operations, purchase equipment and land, and incorporate value-added production. HCEDA also helps experienced and new farmers with business development, diversification, licensing and permits, and training and education.



Preparing for the Future

The rise of e-commerce, smart devices, advanced technologies, and last-mile delivery could have a tremendous impact on how farms and agricultural enterprises operate, perform transactions, and interact with buyers or consumers. Modernized infrastructure becomes important for helping farm and food businesses meet the demands of the future. Howard County's strong technology industry supports growth in many of these areas. As an example, many Howard County farmers are already taking advantage of online platforms like 1000EcoFarms to sell and locate product.

Transportation infrastructure may need to adapt to support delivery preferences. New infrastructure solutions could include e-commerce pick-up hubs where people can conveniently access food from farms, CSAs, food access providers, restaurants, and others. These hubs may even pave the way for drone-delivery depots and last-mile delivery staging. Hubs, depots, and staging could address congestion, reduce truck traffic in communities, and ensure efficient and safe delivery of products. The County's Roving Marketplace, an extension of the hugely successful Roving Radish program, facilitates the aggregation of product from farms in the Rural West to a storefront in the Long Reach Village Center in Columbia.

With the growing desire for local food, opportunities for urban agriculture could be explored in the East. Greenhouses, community gardens, vertical gardens, hydroponics, and other innovative practices create unique opportunities for agriculture just outside of major cities and within larger metropolitan areas. Local food production has many benefits, including reducing transportation challenges and the environmental harm done by long-distance transportation. Many of the County's eastern zoning districts allow farming, and emerging agricultural practices like indoor agriculture are already growing in the County. Updates to the County's Zoning Regulations should maintain the ability to farm where currently permitted.

Farm Ownership Transition

Farm ownership transition to the next generation of farmers is important for sustaining agriculture in the County. The USDA Census notes that in 2017, the principal farm operators had an average age of 61.1 years. Trends between 2002 and 2012 indicate that the number of farmers over the age of 64 increased from 26 to 34%. Meanwhile, farmers younger than 45 declined from 18 to 6%. In 2017, only 19% of principal operators were considered beginning farmers, meaning they had less than 10 years of experience in operating a farm. This is a troubling trend for an industry in transition and is related to multiple factors, including the profitability of farming and the start-up costs for new farmers (such as land, equipment, and labor).

Farms are generally not very profitable in Howard County. In 2017, 73% of farms reported losses, as expenses have continued to increase while net income has languished. In 2017, most principal operators (63%) did not consider farming to be their primary occupation and most needed another source of income. As a result, 69% of principal operators worked off-farm and 46% of principal operators worked off-farm for more than half of the year.

High land values in the County can limit the ability of beginning farmers to purchase farmland. Labor costs and availability are also an issue. Labor costs as a share of total farm expenses have tripled between 2002 and 2017, even as the number of hired laborers has declined by 12%. Currently, labor costs represent about 33% of total

farm expenses. Not only is there a lack of skilled workers and training programs, but many farms also can't afford to pay skilled worker wages.

The County could consider options to help beginning farmers get started, such as renting County land to new farmers at low or no cost and/or creating a farm equipment sharing or leasing program. The County could also consider funding assistance for farm purchases, such as providing bridge loans for the purchase of unprotected farmland (with the loan being repaid once a preservation easement is sold on the farm), or creating a low-interest revolving loan program.

In addition to a stable, significant land base, farmers need flexibility and technical assistance to prosper in a competitive global and regional economy. Howard County farmers must be able to utilize innovative farming practices so they can adapt to the evolving market. Enhancing their ability to farm efficiently is critical to the growth of Howard County and its ability to maintain a diverse economy. The County could expand partnerships between the Agricultural Land Preservation Program (ALPP), the Economic Development Authority, other agricultural resources, and the farming community to provide opportunities for innovation. Additionally, the County could work with local organizations to consolidate agricultural offices in the County to provide the agricultural community with direct access to multiple resources in a single location.

While various funding and financing programs could support individuals who have chosen farming as an occupation, education is crucial for engaging students in agriculture and helping them consider a career in the agricultural industry. The County should continue to provide support for the National FFA (Future Farmers of America) Organization and reintegrate agriculture into the public school curriculum and vocational education through initiatives such as the Howard County Public School System (HCPSS) Agriculture Science Academy.



EP-9 Policy Statement

Promote and support modern farming initiatives that reflect the changing needs and economic drivers of agriculture in Howard County.

1. Support development of appropriately equipped and licensed commercial processing and kitchen facilities that can accommodate various agricultural and food processing needs for farmers and entrepreneurs.
2. Continue and expand business development services that can position agricultural enterprises for growth, innovation, and diversification.
3. Improve opportunities for the growth of e-commerce and last-mile delivery infrastructure, including integration of technological advances in customer delivery.
4. Encourage and enhance agricultural opportunities in the eastern portion of the County.
5. Enhance and expand the partnership between the Agricultural Land Preservation Program, the Howard County Economic Development Authority, the University of Maryland, and the farming community to assist farmers as agriculture continues to evolve and diversify.
6. Consider consolidating offices, services, and educational resources for supporting the farming agriculture community in a single location to better coordinate marketing and other programs, and support operators when interacting with government agencies. Ideally these functions would be physically located in the west in a location that also hosts the public for programs and activities to learn about and promote agriculture.
7. Complete an Agriculture Master Plan within three years from the adoption of HoCo By Design. The Plan should be focused on how to best position Howard County's agriculture industry to compete, grow and prosper. The effort should include a combination of local stakeholders and experts along with external experts.

EP-10 Policy Statement

Continue and enhance established technical and funding efforts to support the farming community.

Implementing Actions

1. Continue funding for the Howard Soil Conservation District to assist farmers with design and installation of best management practices (BMPs).
2. Consider expanding County assistance to fill gaps in cost share programs for agricultural BMPs.
3. Continue the Howard County Economic Development Authority's Agricultural Marketing Program, including its Agricultural Innovation Grants, business planning, and other financial and technical assistance.
4. Expand the Agricultural Innovation Grants by allocating additional resources and creating opportunities for urban agriculture endeavors in the East.
5. Recognize the Agriculture Land Preservation and Promotion Fund as a funding source not only for acquisition of easements, but for the promotion and backing of the industry and operating businesses in accordance with applicable laws.

EP-11 Policy Statement



Support and encourage beginning farmers to build a diverse farming community.

Implementing Actions

1. Support the development of new and continue ongoing agricultural education initiatives that encourage students from a variety of backgrounds to consider agriculture as a career choice.
2. Consider establishing a financing program to help farmers purchase farmland.
3. Establish a grant program for beginning farmers.
4. Consider leasing county-owned land for start-up agricultural businesses.
5. Consider creating a program to loan or share farm equipment.
6. Enhance availability and access to community gardens that can be used by beginning farmers.

EP-12 Policy Statement

Reduce regulatory barriers to diversified agricultural operations in both the Rural West and the East.

Implementing Actions



1. Update the Zoning Regulations and other policies to promote agricultural expansion and diversification, especially for on-farm processing and other agribusiness opportunities.
2. Work with agricultural and community stakeholders to review and update the Zoning Regulations and other regulations to create more opportunities for agritourism.
3. Reduce barriers to the burgeoning demand for on-farm breweries, wineries, cideries, meaderies, and distilleries, farm stays, event venues, and other agritourism uses.

EP-13 Policy Statement

Review transportation planning and road development and maintenance standards to reduce transportation barriers to farming.

Implementing Actions

1. Improve rural road conditions by increasing overhead tree clearance and addressing passage at narrow bridges.
2. Reduce conflict between recreational, residential, commercial, and agricultural road uses.



Managing Mineral Resources

A 1981 Maryland Geological Survey study identified Howard County's principal mineral resources as sand and gravel, which are of great importance to the construction industry. These resources are confined mainly to the Coastal Plain portion of the County, specifically from the Howard and Anne Arundel County border westward to approximately midway between Route 29 and Interstate 95. The Maryland Geological Survey also indicates there is potential for crushed stone production west of Interstate 95, based on mineral resources endemic to the Piedmont region of Howard County, but locations were not identified.

The Maryland Department of the Environment (MDE) issues mining permits per the Surface Mining Act of 1975. MDE identifies three mining operations in Howard County—one in Marriottsville, and two in Jessup. However, one of the Jessup facilities is no longer mining. Both active facilities quarry stone or hard rock. Sand is no longer mined in Howard County.

Howard County's Zoning Regulations allow quarries as conditional uses in rural and industrial areas, subject to certain approvals and limitations. Pre- and post-extraction planning and ongoing management are required to ensure mining operations do not impact quality of life in adjacent neighborhoods. Existing infrastructure, such as roads, must be sufficient. Final use of a mined site is planned prior to any extraction. While it is not anticipated that quarry activities will cease during the planning horizon for HoCo By Design, if they do, a planning effort should be undertaken to identify potential reuse of the sites. For any activities that cease during the planning horizon for HoCo By Design, a planning effort should be undertaken to identify potential reuse of the sites.

Industrially zoned areas, where mining is a conditional use, are primarily in the Route 1 Corridor and coincide with the Coastal Plain area of the County. This could afford potential opportunities for additional mining, if feasible, but such activities seem unlikely, given existing and planned development in the Corridor.

Continue to balance the potential for mineral resource extraction with other land uses.

EP-14 Policy Statement

Implementing Actions

1. Continue to allow mineral resource extraction as a conditional use in the Zoning Regulations in appropriate locations.
2. Explore opportunities for the future reuse of quarry sites.